

Thursday 7th March

The Conversation: The next 10 years

Reflecting on what's next for arts, museums and libraries in a changing landscape

 @HWicks

britainthinks.com

Contents

01

The starting point

02

10 key insights for
the next 10 years

03

What this means for
the sector

01 The starting point

Our starting point...

Context is everything

**Start from where people *are*, not where you
wish they *were***

Britain is a divided nation with Brexit as the poster child



Access to
opportunities



Affluence



Britain's role
in the world



Digital era



Generational
divide



London



Political
divisions



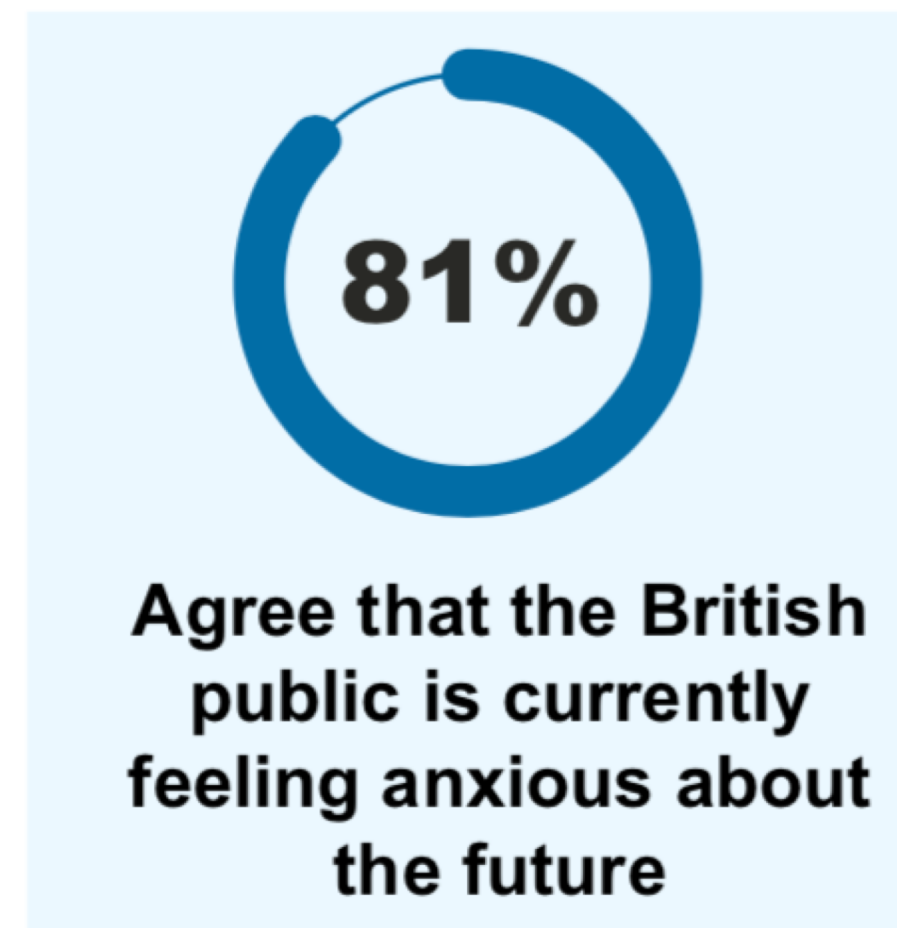
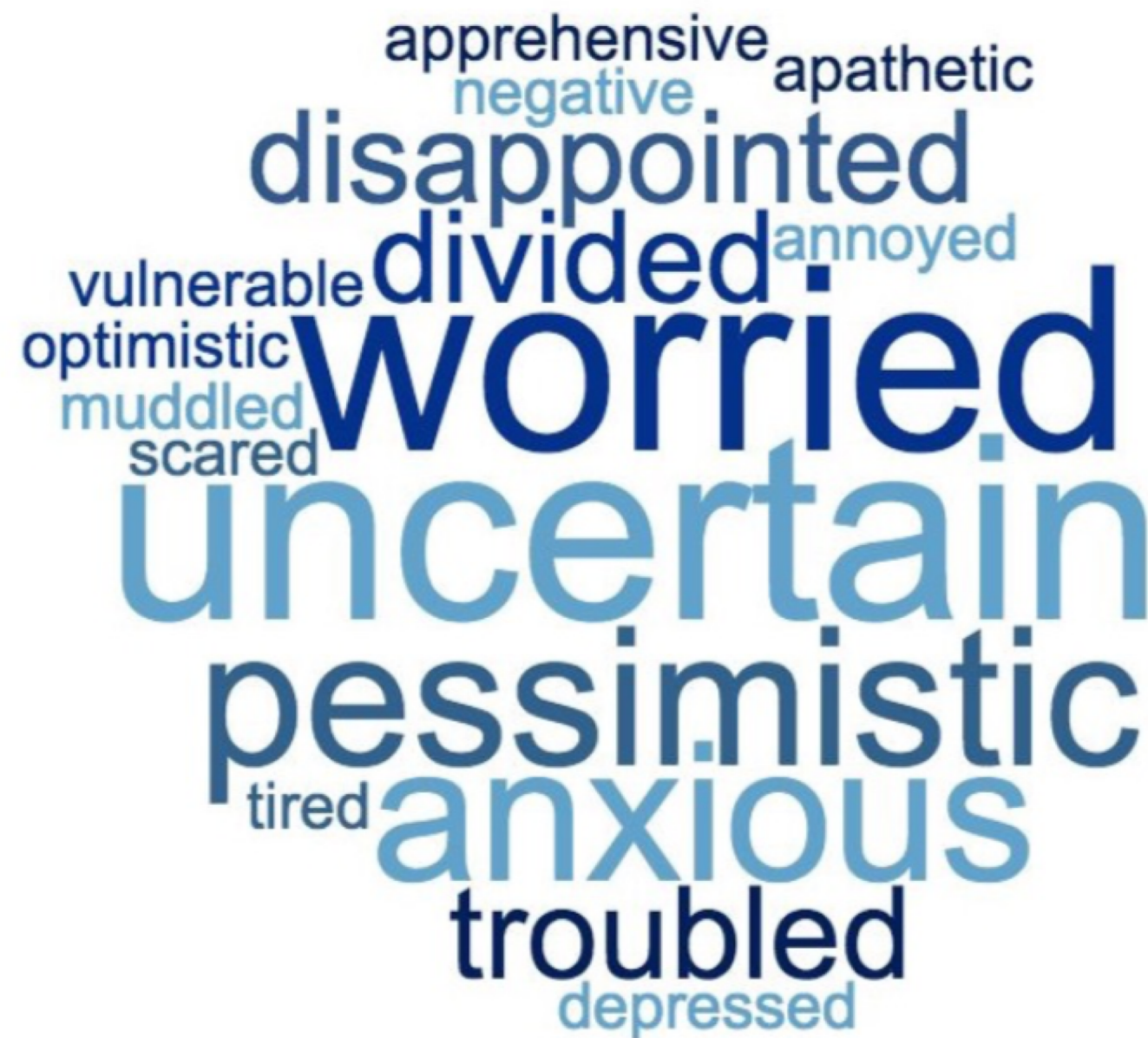
Them and us



Values

These divisions currently feel irreconcilable

Uncertainty, anxiety and worry are dominating the national mood

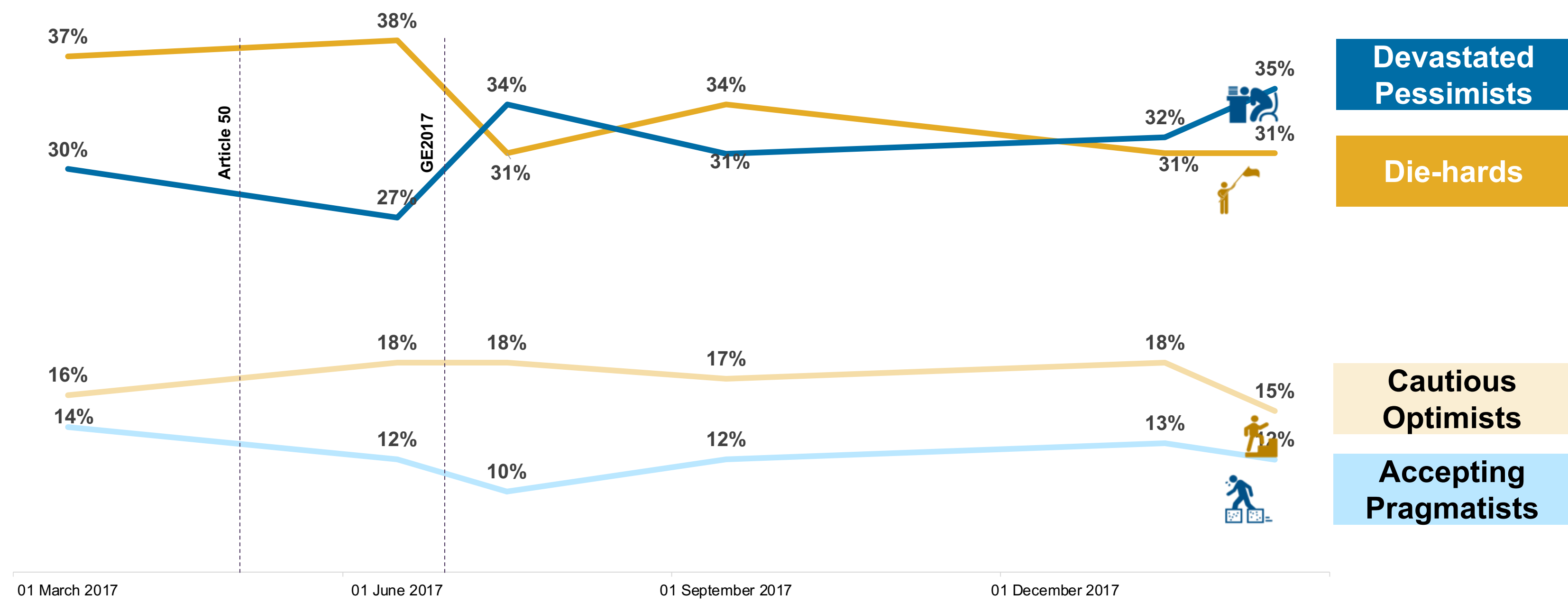


"[I think the nation is feeling anxious] from the previous year and what's happened with politics and the EU. The uncertainty."
(Participant, 18-30)

Q. What 3 words sum up the 'mood of the nation' in 2018?

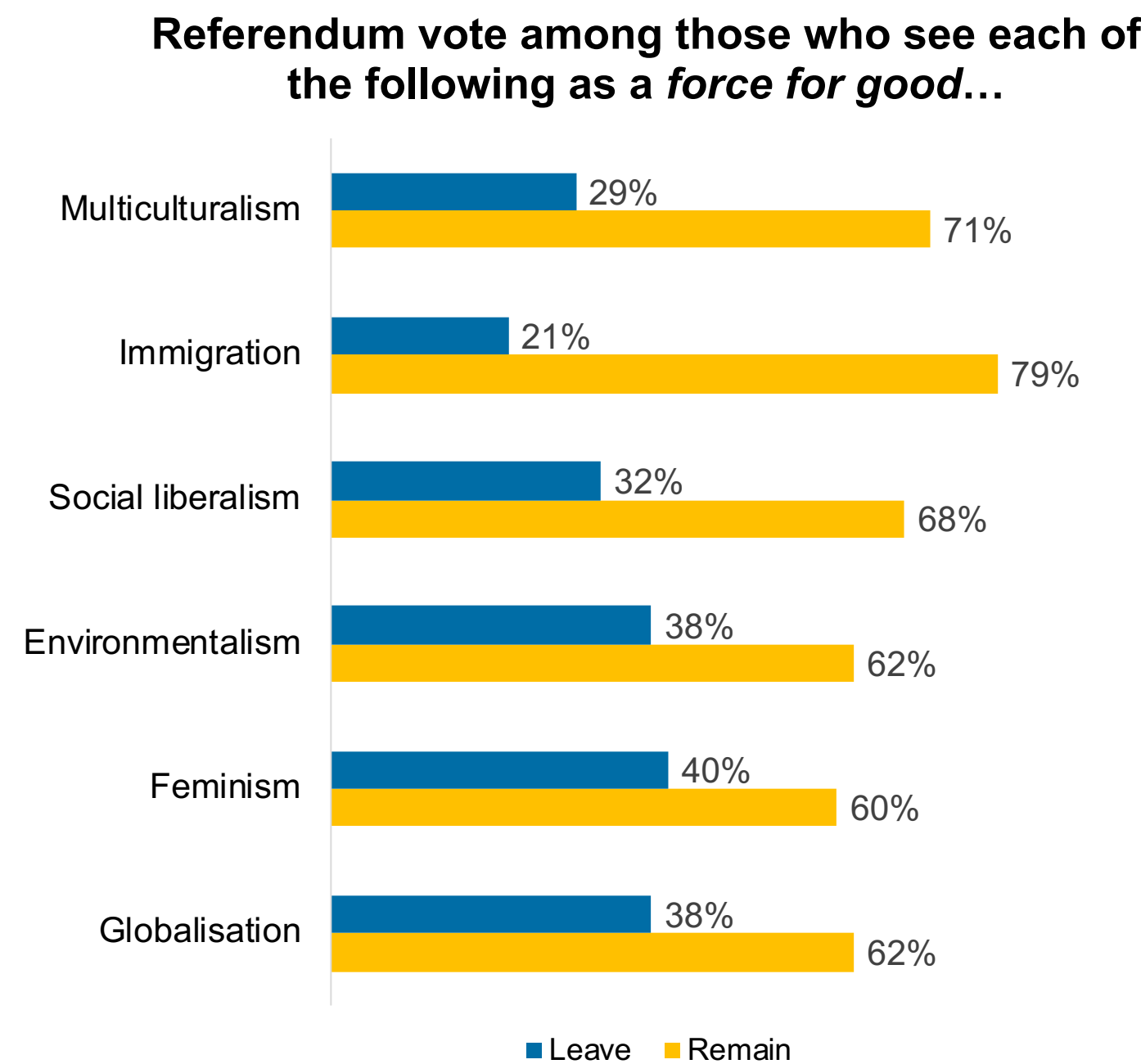
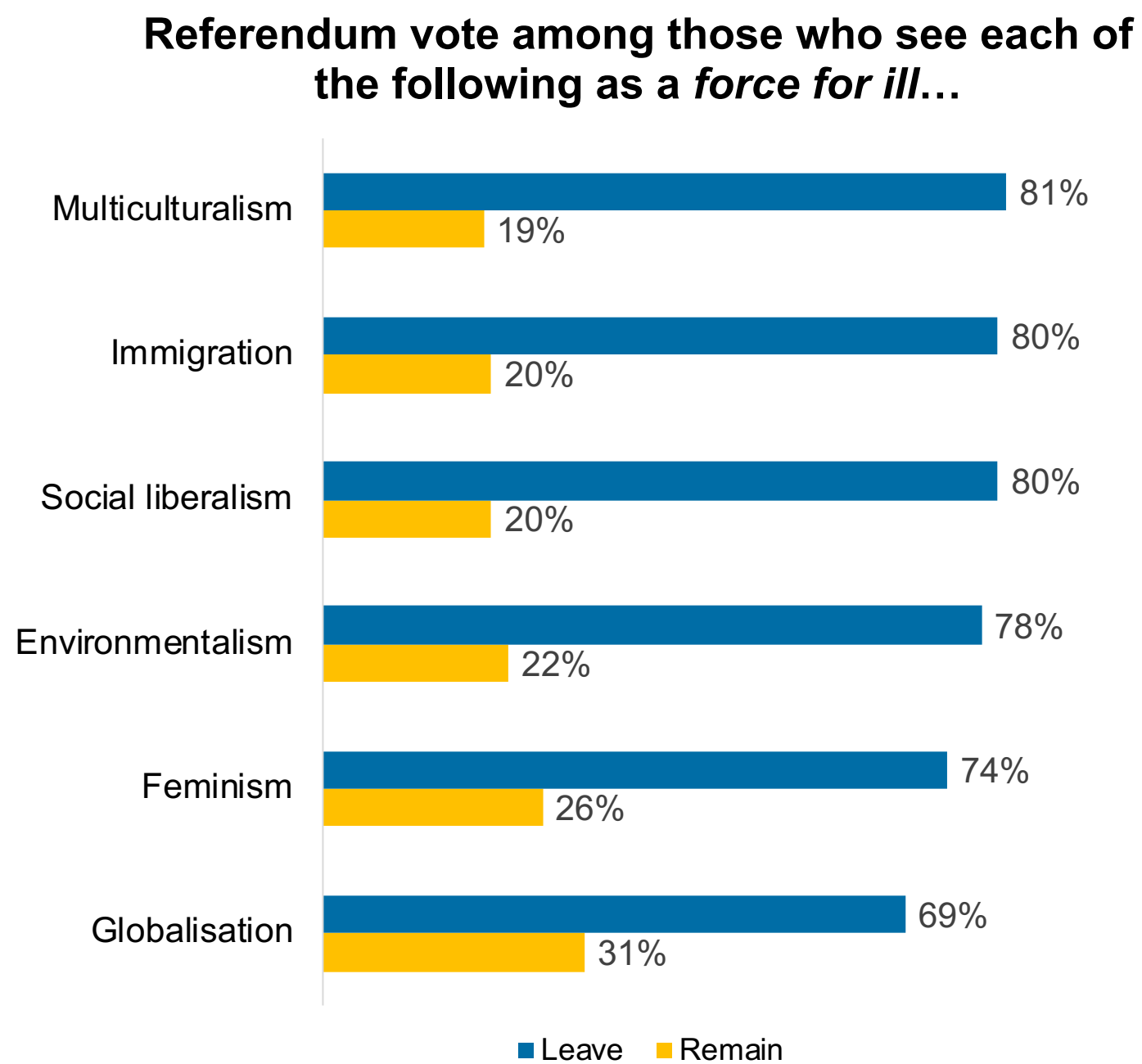
Q4. To what extent, if at all, do you agree or disagree with the following statement: The British public is currently feeling anxious about the future? Base: All respondents (n=2051)

The divisions around Brexit remain stark



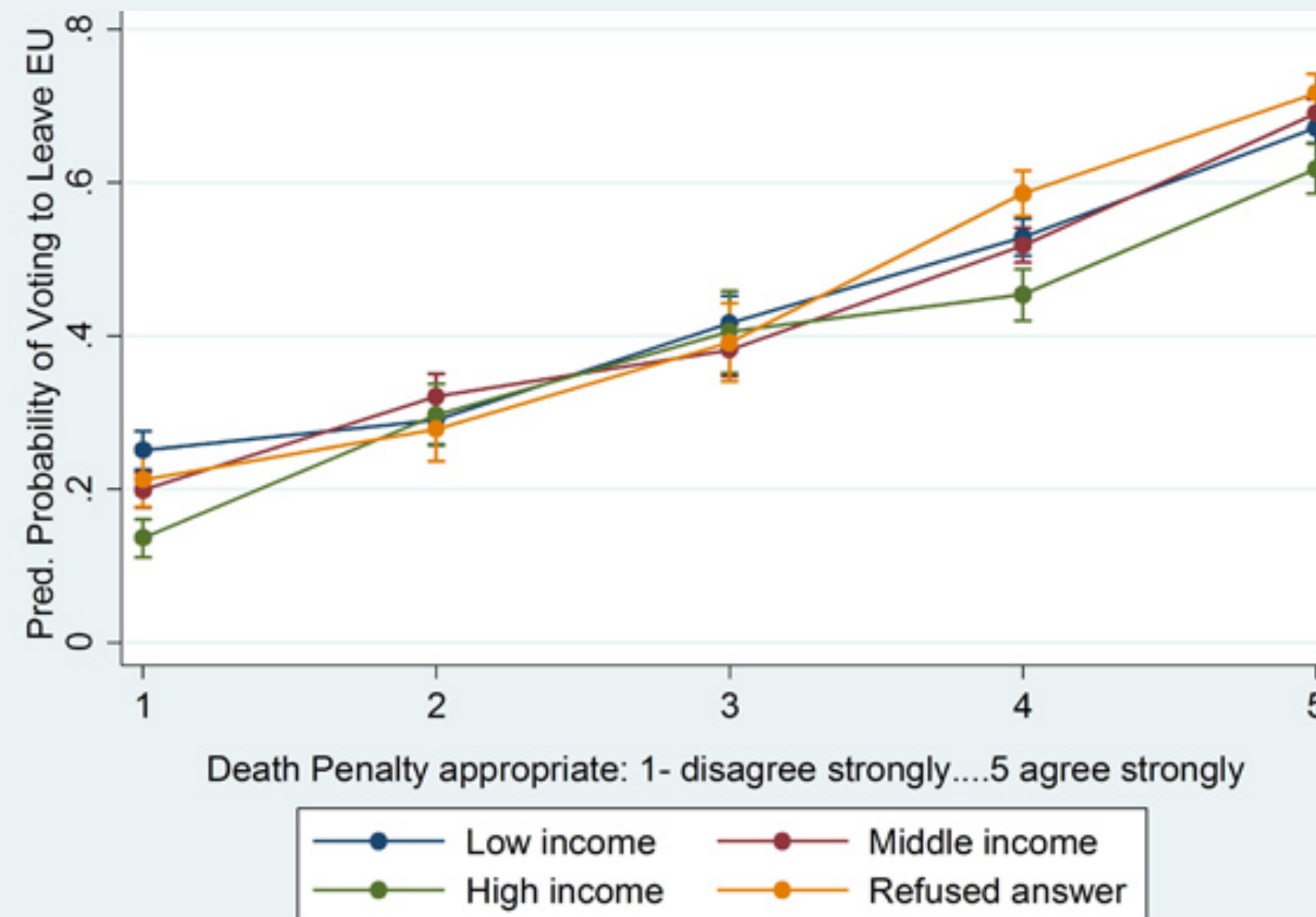
Q3. Last year the United Kingdom voted to leave the European Union, in a referendum on 23rd June 2016. Thinking about this referendum, which of the following comes closest to describing your viewpoint? Base: all respondents (n=c.2000 per wave)

Increasingly, the Brexit ‘tribes’ indicate much more than attitude to the EU – Britain is divided by age, geography and class, but, crucially, by values too



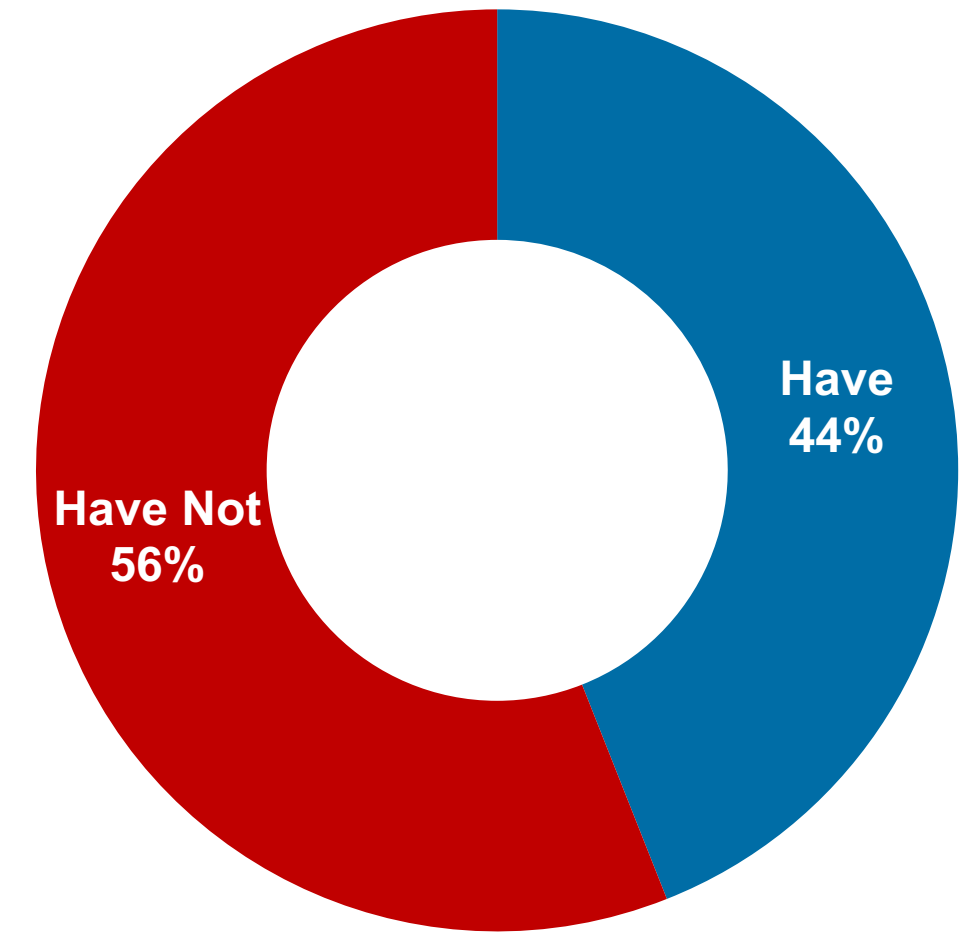
The biggest single predictor is how you feel about the death penalty

Not the left behind: Income, Capital Punishment and Brexit, White only (BES 2015-2016)

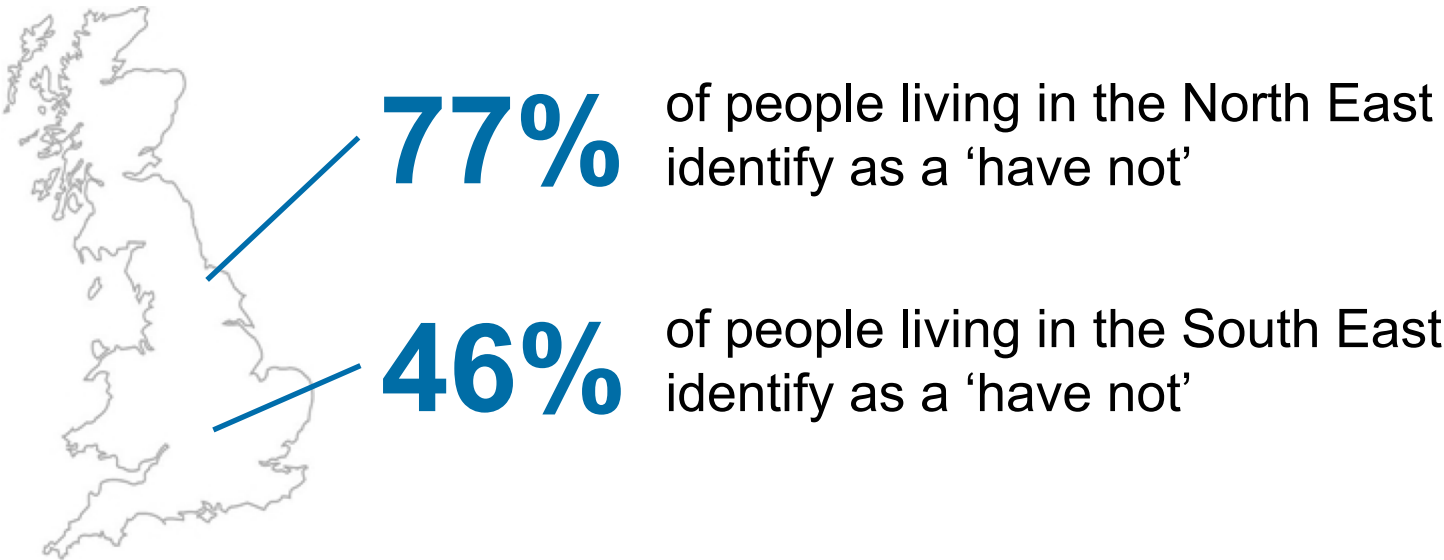


Stagnant real wage growth and austerity have created a Britain of ‘haves’ and ‘have nots’

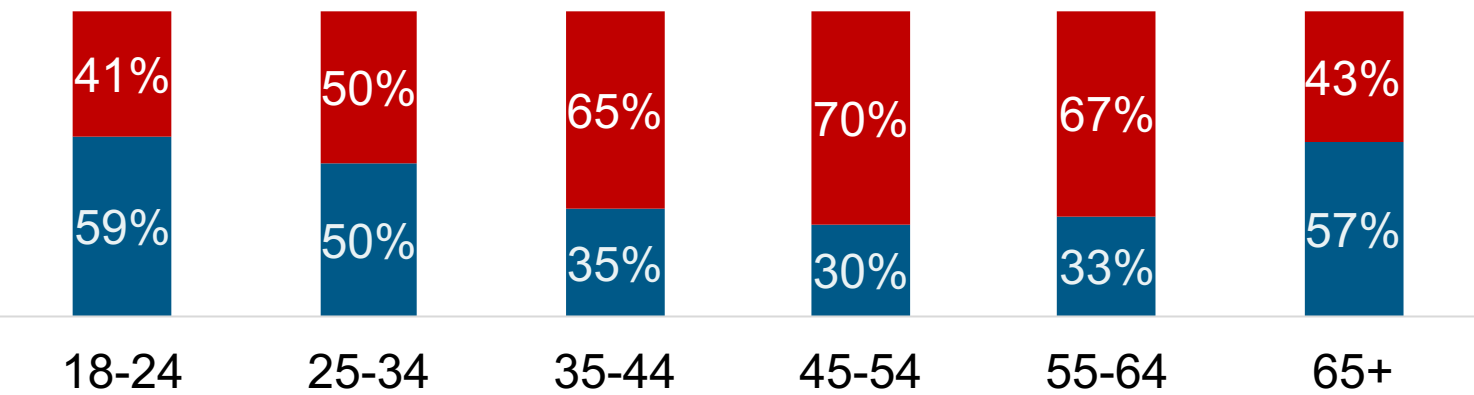
The British public is more likely to associate themselves with the ‘haves nots’:



There is a clear North/South divide – most strikingly in the NE versus SE



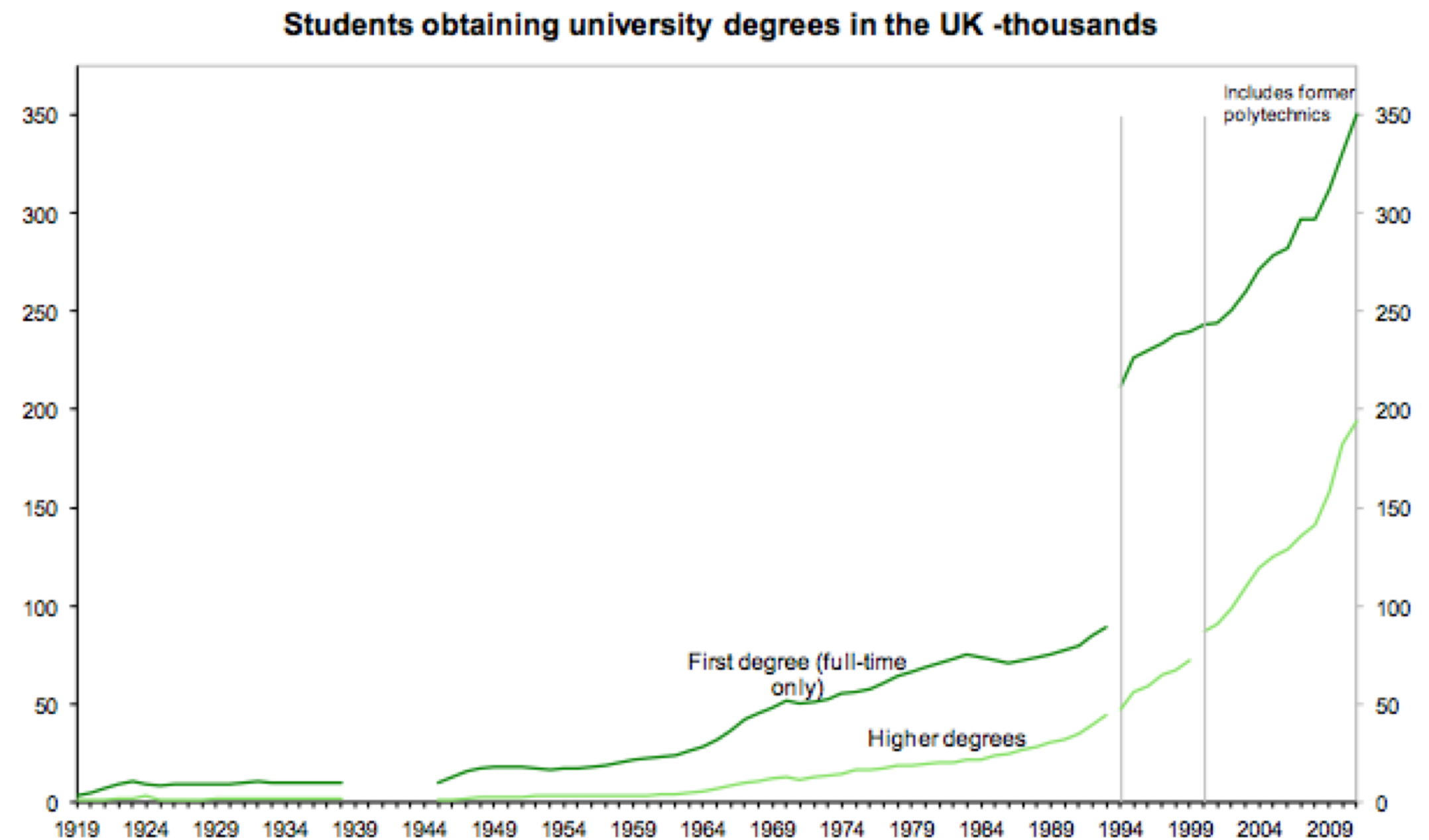
Disenchantment increases with age up until pension age



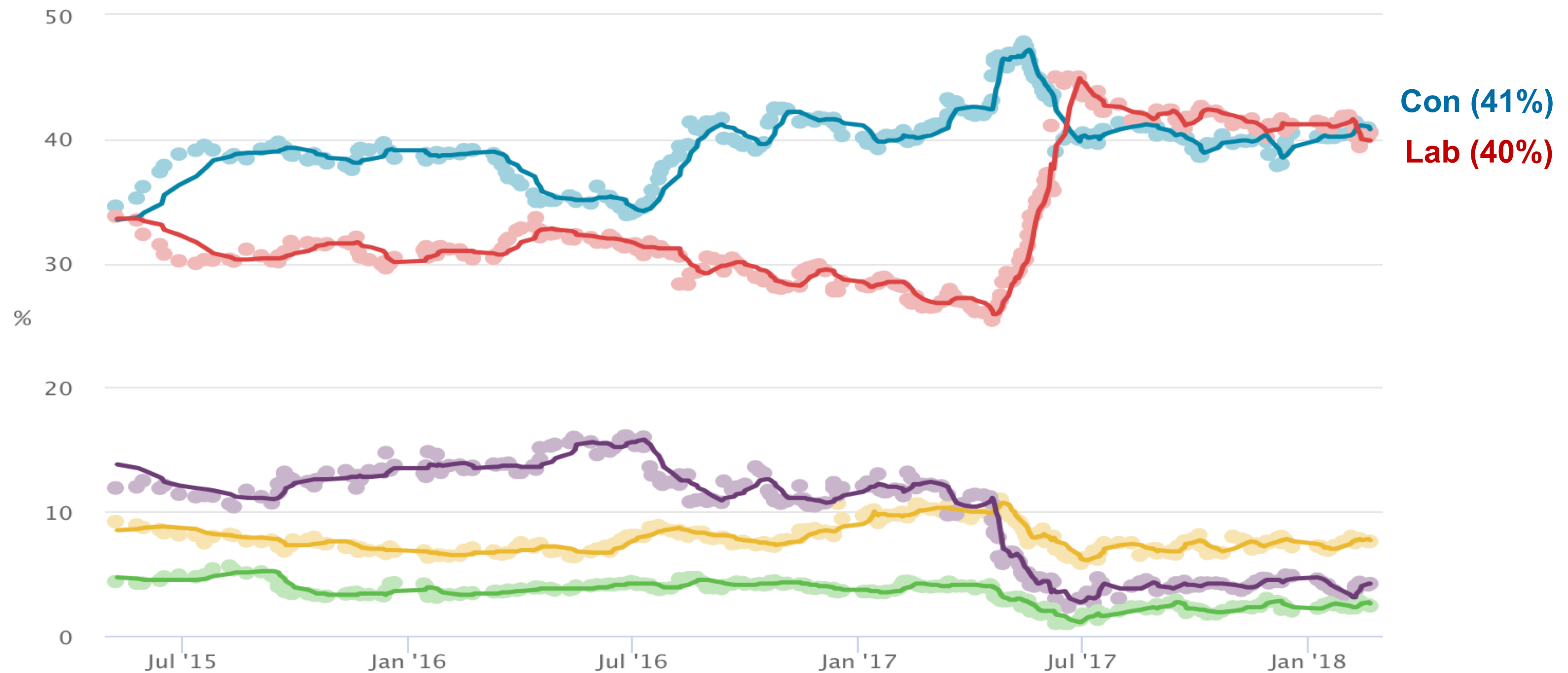
Source: BritainThinks research with the Resolution Foundation, 2016

Generational differences: Baby-Boomers and Millennials

- Attendance has increased, yet so have costs,
- Unemployment has decreased, yet competition and debts have grown
- According to the Resolution Foundation, *“the cost of education, health and social security as a slice of GDP is predicted to rise at today’s prices by £24bn each year to 2030 and by £63bn a year to 2040”*

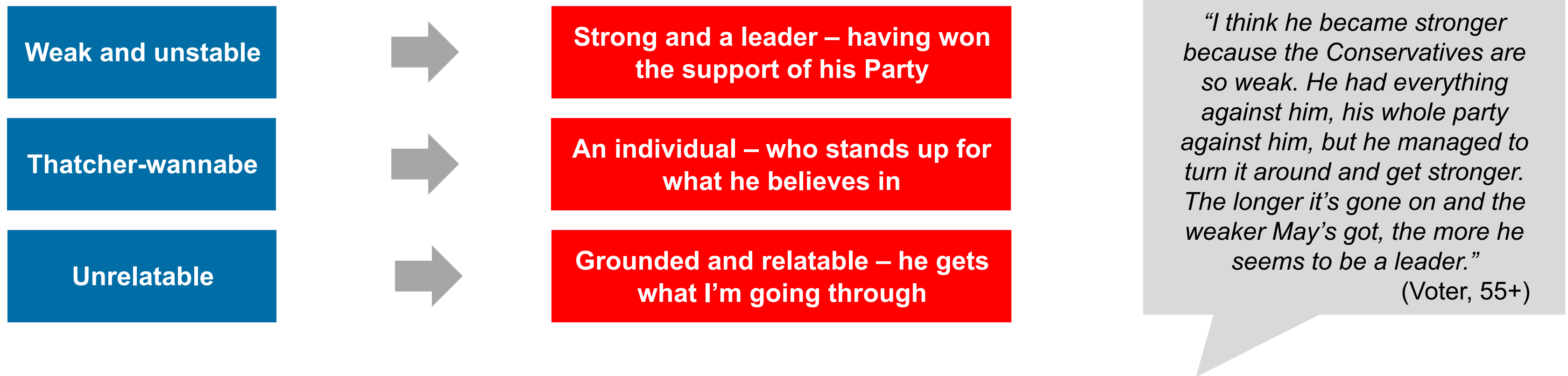


Divided Britain is also playing out in party politics, with the return of two party politics



But neither side and neither leader is really trusted, with a strong sense of ‘none of the above’

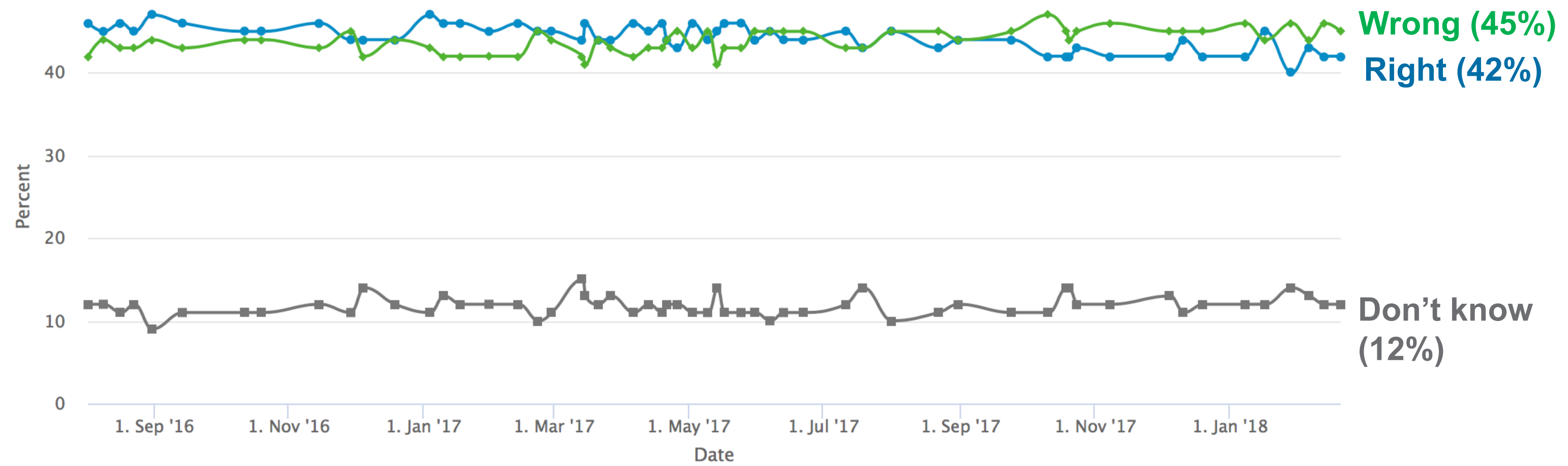
- Corbyn’s successes are only relative to May’s weaknesses:



- And anxieties about his ability to deliver remain
 - May is still more trusted to deliver a good Brexit deal, despite abysmal personal favourability ratings and declining trust in the Government’s handling of negotiations

The outcome of Brexit, when it comes, will inevitably disappoint half of the country and reinforce divisions

In hindsight, do you think Britain was right or wrong to vote to leave the EU?



Source: Poll of polls based on 61 polls conducted between 1st August 2016 and 8th January 2018

But it will also disappoint those with incredibly high expectations, with the Government still not levelling with Brexit voters about the real trade-offs

Even the Remain ‘tribes’ often express high hopes for the potential for Brexit to control immigration, regain sovereignty, and trade further afield:

“I am looking forward to it. This is a fantastic opportunity to rebuild the country: more police, better hospitals, more schools and teachers.”

“A chance to explore a different avenue for Britain. To see whether this could make Britain even more successful.”



Brexit will also increase regional disparities, against many expectations

Impact of Brexit scenarios (% of regional GDP)



“I think the mood is really optimistic on the ground right now, and that Brexit is helping rather than hindering that. This is an opportunity to stop everything being so geared towards London and spread wealth across the UK.”

(Political stakeholder, Manchester)

**This is the backdrop against which our
research was conducted**

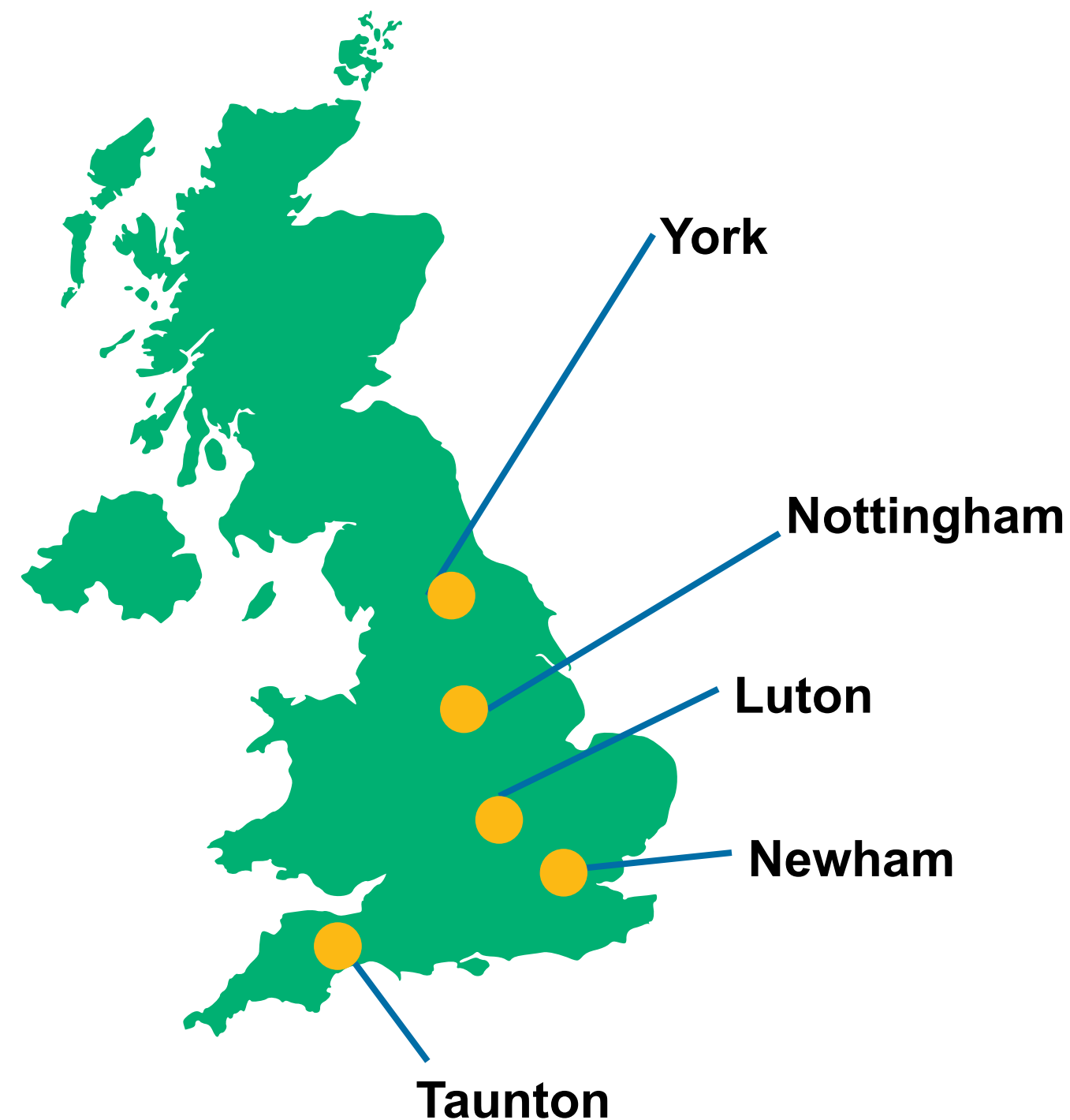
02 10 key insights for the next 10 years

Objectives and methodology

Objectives

- In Autumn 2019, the Arts Council will publish a new strategy from 2020-30, setting out its vision, mission and ambition for the next ten years.
- As part of this process, it is taking stock of its current activities and approach, and asking a series of high level questions about its future.
- BritainThinks was commissioned to conduct a collaborative and open Conversation exercise with the sector, other stakeholders, Arts Council staff and the public.

Methodology: qualitative research



1. Online conversation

- 1,445 registered members
- Lasting 12 weeks

2. Workshops

- 10x half-day deliberative workshops
 - 5x with the general public (recruited to be demographically representative of the local area)
 - 5x with the sector (focusing on the unfunded sector)
- Locations chosen to include high, medium and low participation levels in arts, museums and libraries

3. Ethnographic interviews

- 10x interviews with individuals and organisations
- To give additional insight and greater weight to those who might be traditionally 'unheard'

Methodology: quantitative research

1. Public survey

- Using an omnibus approach
- Nationally representative sample of 2,097 adults in England aged 16+

2. Sector survey

- Using an open link approach
- 1,173 participants

Key insights

1 Arts, museums and libraries make a valued contribution to society, but communicating what the sector is and does is a challenge



"...the problem of ACE being responsible for the "Arts" - a loose concept, and "Museums and Libraries" - physical institutions. Regarding culture... the institutions "Archives, Museums and Libraries" are implicitly included in the definition as they are the repositories of cultural artefacts. My suggestion is that the ACE should focus on the concept of culture rather than those institutions that house the artefacts. This provides for a more cohesive vision. If we add "culture and museums" then we are basically back to square one: an ambiguous vision."

Sector, online Conversation

2 Arts, museums and libraries are considered to be important for different reasons



Arts



Museums



Libraries

Sector

Inspiring new ideas and fresh insights (72%)

Educating children and young people (77%)

Educating children and young people *and* adults (89% each)

Public

Providing entertainment (37%)

Retaining a sense of history (63%)

Educating children and young people *and* adults (64%/51%)

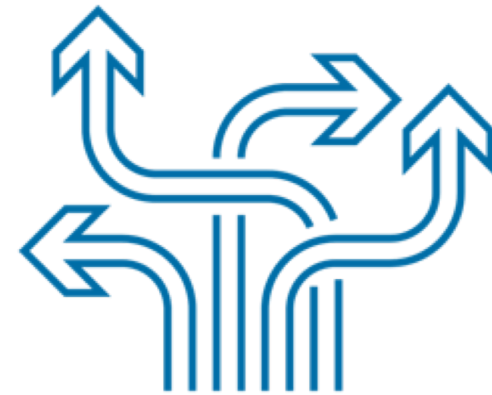
"Libraries might provide resources for people in relative poverty. For example, being able to have access to the internet."

Public, workshop, Nottingham

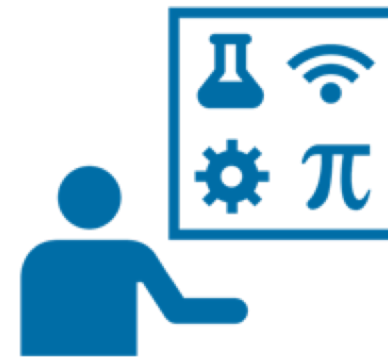
3 The future for arts, museums and libraries is seen to be uncertain: there are a wide range of challenges that it will face



**The rise of
digital
technology**



**Changing
behaviours and
interests**



**Increasing
focus on STEM
in schools**



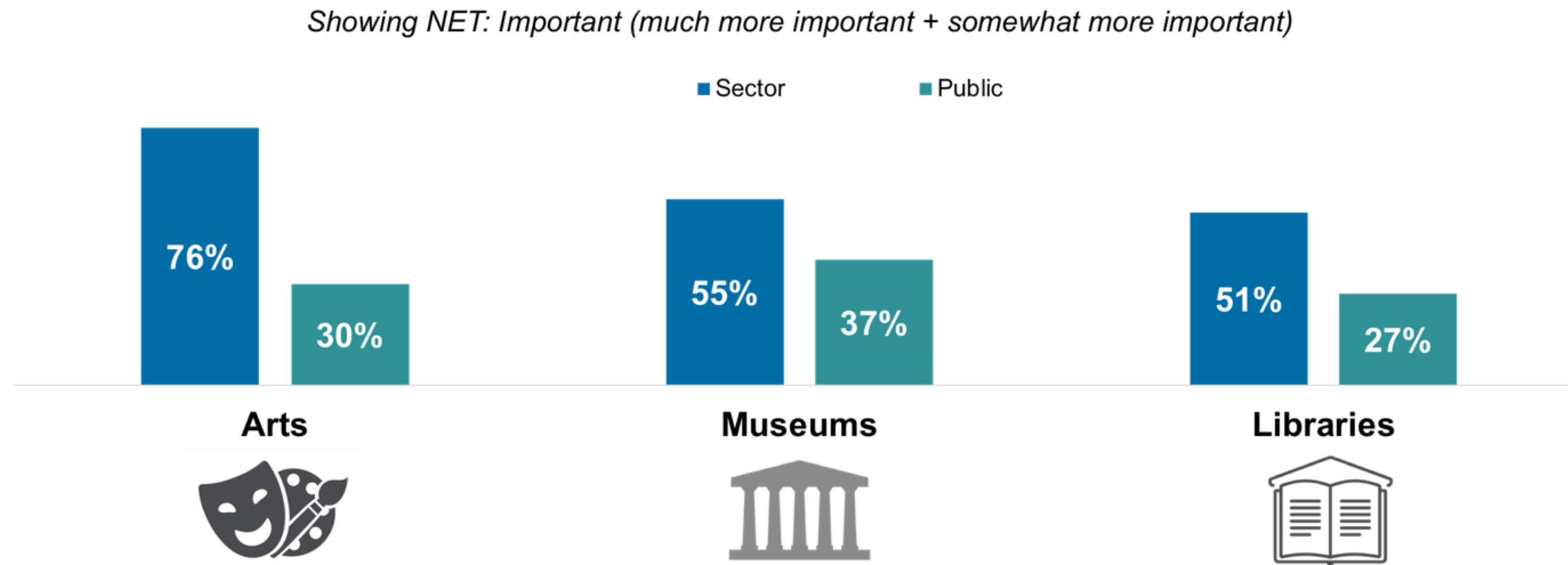
**A more diverse
society**



**Ongoing
austerity**

4 And as a result of these challenges, the future importance of arts, museums and libraries is questioned

Sector and Public: Perceived importance of arts, museums and libraries in the next ten years



Q12/Q4. Thinking about the next ten years, do you think the following will become more or less important to society...? Base: All English adults (n=2097); All sector participants (n=1173).

5 Digital technologies present the biggest opportunity to the sector...



Widen access



Engage traditionally ‘hard to reach’ audiences



Open up London’s offer beyond London



More interactive experiences, moving beyond ‘look but don’t touch’ associations

“Part of the accessibility, is to do with if you can go to London...but a lot of people can’t get to London.”

**Non-funded sector, workshop,
Nottingham**


“Augmented reality to improve museums in the future – for example, Pokémon Go last year, going around through your phone and you might see the artefact in the museum and interact with it.”

Public, workshop, Nottingham

6 ...But also the biggest threat

 Leads to live, real experiences becoming redundant

"Because of technology there's not much use for libraries and museums anymore."
Public, workshop, Newham

 Perpetuate social isolation

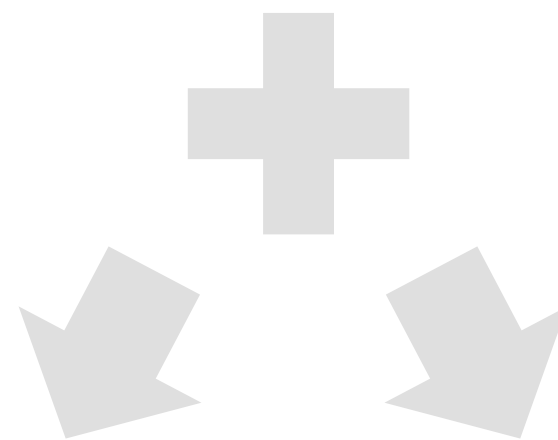
 Reduces the need for physical buildings (e.g. libraries)

"Are we going to be going to the Natural History Museum where we go, just put on a headset, and go virtually?"
Public, workshop, York

 Lacking digital skills

7 Arts, museums and libraries must celebrate diversity, be accessible and actively welcome everyone

Diversity ≠ just ethnicity and gender
Accessibility ≠ just for disabled people



A diverse offering of provision

Diversity in the workforce and leadership

“We’ve been educated that arts are highbrow, that it’s not for everyone. They’ve come to the conclusion that it’s not for them. They think ‘I’m not allowed to participate’ or ‘it doesn’t include my culture.’”

Non-funded sector, workshop, Luton

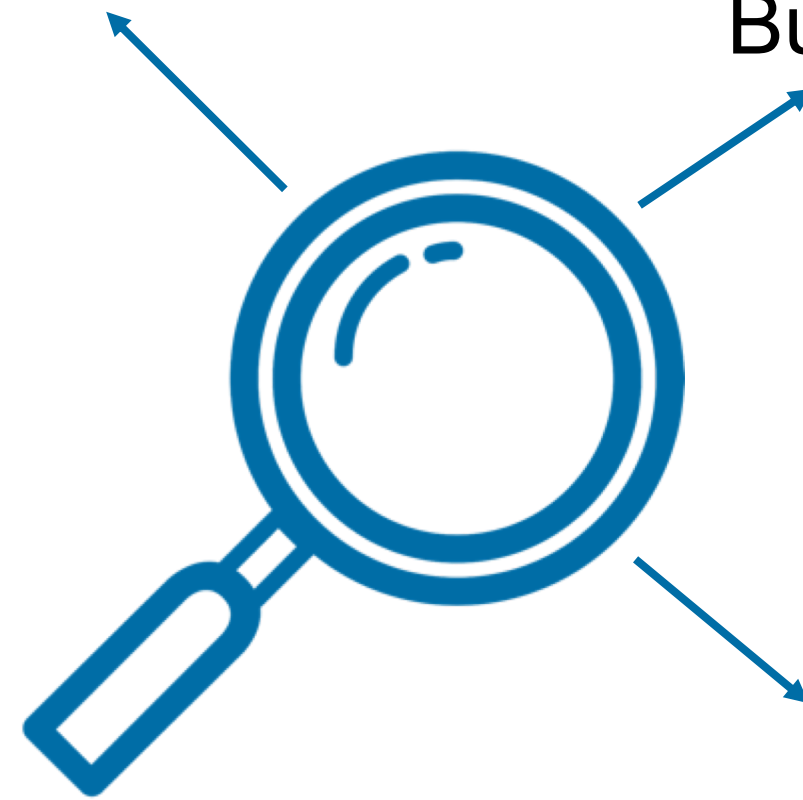
“These activities have to be accessible to all ages and incomes, they can’t be elite – they’ve got to be a place for mothers and fathers. They’ve got to have facilities for those with disabilities, like braille or T-Loops. They’ve got to be for everyone.”

Public, workshop, Taunton

8 There needs to be a greater focus on the local ecology...

Give local people a say

Build local relationships



Give libraries a central role to adapt and grow

"We need to ask people what they want – and stop sitting in our ivory towers. Let's make stuff that the audience will want to come to!"

Non-funded sector, workshop, Luton

"If the government has limited funding, the funding they give has to have value for money. If they are funding a library and they are just throwing money at them and not getting anything for it... it is limited funding, it's a limited pocket."

Public, workshop, Nottingham

9 ...Whilst maintaining national relevance

Important for
international reputation

Tour *into* and *out* of
London



Generates important
revenue from tourism

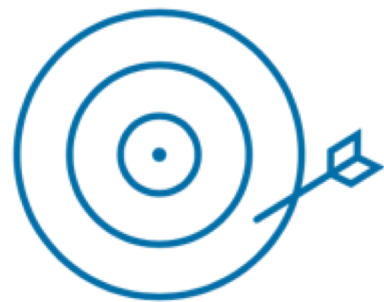
“You need to distribute the funding from London, yes, but also the art. Take it out of London’s basements and distribute it to museums and libraries!”

**Non-funded sector, workshop,
Nottingham**

“Everything seems to go on in London and nowhere else in the country. Why can’t London exhibitions tour around major cities?”

Public, workshop, Taunton

10 Children are the future – but there are considerable barriers to their participation which may impact the future for the sector



Misconceptions young people hold

“Focus the advertising on younger people, making it cool, making it more relatable.”
Public, workshop, Luton



Skills shortages and impact of STEM focus in schools

“Where opportunities do exist initially, too often those who can continue to engage rely on parents/carers who already value the arts to enable them to do so.”
Sector, online Conversation



Parental concerns about career sustainability

“It’s a risky one – you should probably only do it on the side of a proper job.”
Public, workshop, Newham

03 What this means for the sector

What does this mean for the role that visitor studies has in reflecting the wider world?

We are living in a divided society

Arts, museums and libraries are a cohesive force. Understanding your visitors, and potential visitors, can bring different people together through shared experiences

Understanding your locality is key

Ensuring that your offering matches the diversity of interests of your local area is key to diversifying your audiences

Use the accessibility offered by digital, to further your reach

Digital attracts younger people; making the most of these opportunities (whilst mitigating the associated risks) can help engage young people in your work, and safeguard the sector's future

How can visitor studies help advocate for change?

Understand your audience

Understand their starting point, the issues that matter to them, and how you can serve their interests

Take action on the issues that threaten the sector most

Isolating digital experiences, the rise of STEM in schools, the impact of Brexit on future workforce and leadership – the sector needs to unite to create positive change

Any questions?

Thank you

For more information:

Holly Wicks | hwicks@britainthinks.com

BritainThinks
Somerset House
Strand
London
WC2R 1LA

britainthinks.com