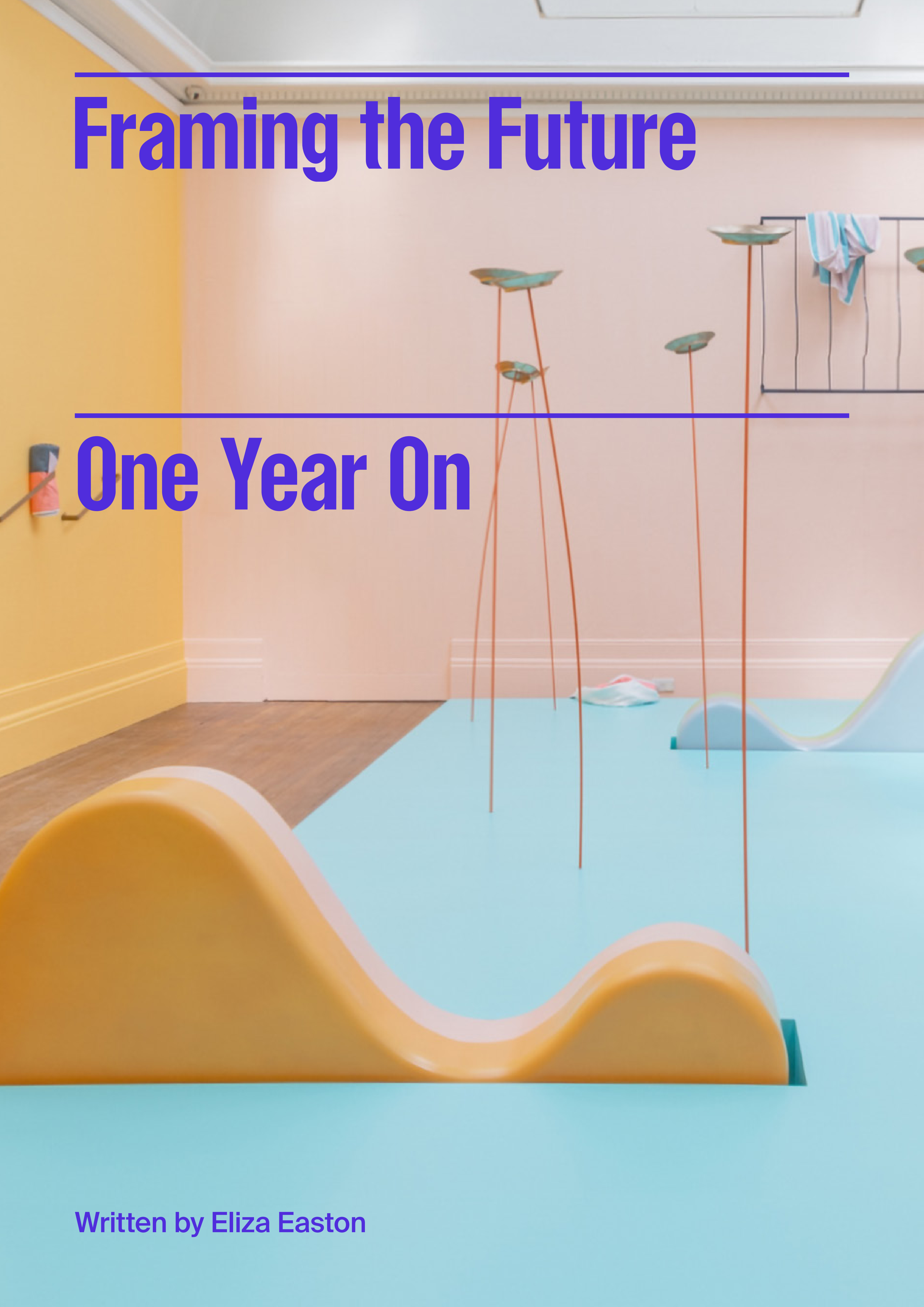
Framing the Future

One Year On



Written by Eliza Easton

Framing the Future: One Year On

A follow-up to *Framing the Future: The Political Case for Strengthening the Visual Arts Ecosystem*, produced by report partners including CVAN and John Hansard Gallery

Cover image: Garth Gratrix, *Flamboyant Flamingos*, 2024, Grundy Art Gallery. Photo by Benjamin Nuttall

Executive Summary

Framing the Future: One Year On reflects on progress since the publication of *Framing the Future: The Political Case for Strengthening the Visual Arts Ecosystem* in April 2025. The original report argued that the visual arts are not only culturally significant, but also contribute directly to key government priorities including health and wellbeing, economic growth and skills development.

Over the past 14 months, there has been meaningful progress in how the sector is understood within UK policy. The visual arts now have greater visibility through the Creative Industries Sector Plan, stronger representation within national decision-making structures, and improved prospects for measuring their economic contribution through SIC code reform.

However, major structural challenges remain. Fragile business models, challenges to arts education, and ongoing pressures on trade and infrastructure continue to threaten the sector's long-term sustainability. Whilst public debate, including through Dame Margaret Hodge's review of Arts Council England, now better reflects many of the structural concerns raised in *Framing the Future*, political visibility needs to translate into sustained investment and systemic change. The installation of Prime Minister Andy Burnham's government has created a renewed opportunity to tackle these issues, but advocacy across the visual arts ecosystem will be the key to securing the long-term structural change the sector needs and deserves.

Read the full analysis by Eliza Easton, Erskine Analysis, below.

NewBridge Project, Newcastle.
Photo by Matt Denham

Introduction

When we published *Framing the Future: The Political Case for Strengthening the Visual Arts Ecosystem* just over a year ago, our ambition was to reposition the sector within the UK's political architecture, not to provide a policy 'silver bullet' for the challenges it faced. Whilst we did offer recommendations, our primary aim was to give it a better chance of surviving in the short term and, in the long term, of thriving – properly recognised as the asset to national life that it is.

We wanted to show what was at stake. The visual arts have an intrinsic value: as we set out in the report, they shape how we think, feel and navigate the world. They are also an area in which the UK genuinely excels. By almost every metric, our visual arts sector is a global leader – home to the world's top-ranked universities in art, design and art history; host to 12 of the 100 most visited museums and galleries worldwide; and competing directly with China and the United States for global share of the art market.

However, the central argument of *our* report was that, crucially for public policy, the sector contributes to key government priorities: raising living standards through economic growth, supporting health and wellbeing, and improving educational attainment. We sought to make clear that any government serious about these objectives should view the visual arts as an investment opportunity.

Unfortunately, this had historically not been governments' approaches. Despite growing evidence of its social and economic importance, the paper highlighted a set of mounting challenges across the visual arts ecosystem, some of which were directly the result of policy decisions (or lack thereof). We set out how falling public investment, intensifying global competition, and shifting educational priorities are putting this world leading sector in jeopardy. Through case studies, we illustrated the on-the-ground impact of trade frictions, alongside reductions in public spending, constraining the sector's ability to deliver social and economic value.

The report's central policy implication was that these challenges could not be addressed through isolated interventions, but instead require a systemic approach grounded in recognition of the sector's economic, social and cultural value.

What Has Changed

Given the ambitions of *Framing the Future*, our communications approach focused on ensuring its message reached political audiences. The APPG for Visual Arts and Artists was involved from inception through to refining recommendations and report dissemination. During the drafting process, we were in regular contact with the Department for Culture, Media and Sport (DCMS); rather than seeking to corner them with recommendations, our aim was to share emerging insights and engage them as a partner in driving the changes we both wanted to see. The launch itself provided an opportunity to bring together all parts of the ecosystem to make the case in person, in parliament. And since publication, the report partners (Contemporary Visual Arts Network, John Hansard Gallery (part of the University of Southampton), DACS Design and Artists Copyright Society, a-n The Artists Information Company, Plus Tate and the All-Party Parliamentary Group for Visual Arts and Artists), have been hard at work making the case for both the sector in general and for its recommendations in particular.

Given our primary aim was to position the visual arts as a strategic priority, it has been encouraging to see a number of significant policy developments since publication that move in precisely this direction. The sector has been explicitly recognised in the UK's industrial strategy as one of the 'frontier' sub-sectors of the creative industries, with the most potential to grow – a clear departure from previous strategies, where the visual arts were largely absent or implicit (there are 11 mentions of the visual arts in this strategy, compared to two passing references in the 2018 *Sector Deal* and another two in the 2023 *Sector Vision*).[1] This reflects a genuine shift in how the sector is understood within the wider creative industries. While debates continue about whether the not-for-profit parts of the sector sit comfortably within an industrial framing, it is nonetheless the case that if the government is pursuing an industrial approach to the creative industries as a whole, the visual arts have a legitimate place within that approach.

1 *Creative Industries Sector Plan*. UK Government, 2025. https://www.gov.uk/government/publications/creative-industries-sector-plan. *Creative Industries: Sector Deal*. Department for Digital, Culture, Media & Sport, and Department for Business, Energy & Industrial Strategy, 2018. https://www.gov.uk/government/publications/creative-industries-sector-deal. *Creative Industries Sector Vision*. Department for Culture, Media and Sport, 2023. https://www.gov.uk/government/publications/creative-industries-sector-vision.

The inclusion of the visual arts within the remit of the Creative Industries Council – with representation from CVAN's National Director Paula Orrell – is also a significant post-publication development. While the *Sector Plan* sets the overall direction for this government's approach to the creative industries, real impact – particularly in a time of political uncertainty – will depend on how specific policies are developed and delivered for the sector. The Council is a key mechanism for translating that strategy into practice, providing the sector with direct engagement with ministers and ensuring that the visual arts are part of a unified voice across the creative industries.

Alongside these developments, changes to Standard Industrial Classification (SIC) codes represent a less public but equally important shift, with implications that extend beyond any single political cycle. In our paper, we highlighted how limitations in existing classifications may be contributing to an underestimation of the visual arts sector's scale and economic contribution. The introduction of a new code (47.921 – covering 'Activities of retail auctioneering houses for art works, antiques and antiquities') is a positive step, improving the sector's measurability and statistical visibility. However, its full impact will take time to materialise, with incorporation into national accounts not expected until 2031.

Regarding the not-for-profit arts in particular, it was good to see that Dame Margaret Hodge's review of Arts Council England echoes many of the structural challenges identified in *Framing the Future*, notably pressures on arts education, declining public investment, investment in artists and the need for more sustainable operating models.

National Saturday Club

There is also clear convergence in specific areas. On business model innovation, our paper called for funding to support risk-taking, diversification and partnerships, while Hodge recommends that organisations evolve their models to strengthen long-term sustainability. On endowment and capital funding, we proposed matched investment to support infrastructure, studios and resilience, while Hodge recommends the establishment of a cultural endowment fund; the Government response to Hodge similarly recognises endowments and philanthropy as key tools for resilience and innovation. Our report highlighted the pressures on individual artists, and the *Hodge Review* recommended a new National Programme for Individuals to support emerging and mid-career artists.

Time will tell how successful the approaches taken by Arts Council England and DCMS prove to be in addressing the challenges facing the sector. The DCMS's review of the National Lottery will be particularly critical in determining how much, and how, the sector is supported. However, it is encouraging that there now appears to be a growing convergence around the nature of those challenges, at least.

There has also been progress on fiscal and local funding tools. The report echoed wider sector calls for devolved visitor levies, and the Government is now taking this forward through consultation, with proposals to grant Mayoral Strategic Authorities the power to introduce overnight visitor levies. This marks a shift towards place-based approaches to cultural funding, long advocated by many in the sector, which will likely be accelerated by the Government's Rewiring the State agenda, a new vision for devolution in England. Our report also emphasised the need to evolve cultural tax reliefs – including Theatre Tax Relief and Museums and Galleries Exhibition Tax Relief (MGETR) – particularly to better support touring and wider sector activity. While reform remains incomplete, this agenda is now more clearly present within policy discussions, including through the *Hodge Review* and the subsequent debate surrounding the future of Arts Council England.

> “This report gives the Government the tools it needs to provide vital support for artists and the visual arts sector. We have a wealth of hugely talented artists in the UK, but that talent can't survive in isolation. If you give artists the support they need, they will thrive. If you don't, only the privileged will be able to become artists, and our culture will suffer as a result.”

Dame Tracey Emin DBE

Where Next

The period since *Framing the Future* was published has seen a clear shift in how the visual arts are understood within UK policy. The sector is now visible within the UK's industrial strategy, has stronger representation within national decision-making forums, and, over time, improvements to the data landscape should make it increasingly difficult to sideline. Together, these developments represent genuine progress towards the report's central ambition, repositioning the visual arts as a strategic national asset.

However, recognition has not yet translated into systemic change at the scale required. The main challenges identified in the original report remain unresolved. Business models continue to be fragile in both the commercial and not-for-profit parts of the sector, and while policy tools such as endowment funding or enhanced export support are now being discussed more seriously, they have yet to be implemented.

Similarly, pressures on the skills pipeline remain acute. In *Framing the Future*, we recognised that longer-term reforms aimed at expanding access to creative subjects in schools had been announced by the Government in Westminster, but argued that interim measures were also needed to ensure the arts remained embedded within the education system whilst those reforms were put into place. These interim measures have not yet been introduced.

First Site, Holiday Fun 2025

As highlighted both in our report and across a growing body of sector research, declining participation and constrained provision risk weakening the future talent pipeline on which the visual arts depend. The skills and education challenges set out in the report are immediate ones, requiring an equally immediate response.

At the same time, while reforms to Standard Industrial Classification (SIC) codes represent an important step forward, significant gaps remain in the underlying data and evidence base. The time lag before these reforms are reflected in official statistics means policymakers are still operating with only a partial understanding of the sector's full economic contribution. The most important task now is ensuring that the growing visibility of the visual arts within mainstream policy is not mistaken for the end point of the conversation, but understood as the beginning of a longer process of structural change. Recognition matters, but only if it leads to meaningful action to protect and strengthen a sector that is both intrinsically valuable, and able to deliver substantial economic and social benefits.

That is also why it was so important that *Framing the Future* brought together voices from across the entire visual arts ecosystem. The installation of Prime Minister Andy Burnham's government has created a renewed opportunity to tackle the issues facing the visual arts, but it will still be the sector's ability to advocate collectively that will be essential if it is to maintain political visibility and avoid once again being pushed to the margins of national policymaking.

> “We can't let the arts become the preserve of the wealthy. If only one kind of person can afford to be an artist, the stories we tell will be narrower, less rich – basically, more boring. We need artists with a wide range of life experiences, but right now, we're heading in the opposite direction.”
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> Larry Achiampong, Artist

Framing the Future: The Political Case for Strengthening the Visual Arts Ecosystem was commissioned by CVAN England Contemporary Visual Arts Network and John Hansard Gallery, which is part of the University of Southampton, in collaboration with a-n The Artists Information Company, DACS (Design and Artists Copyright Society), and Plus Tate.

This sector-wide report, developed and written by Eliza Easton, Director of Erskine Analysis, presented the economic, cultural, and social case for strategic investment in the visual arts.

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