Livelihoods of Visual Artists – Summary Report

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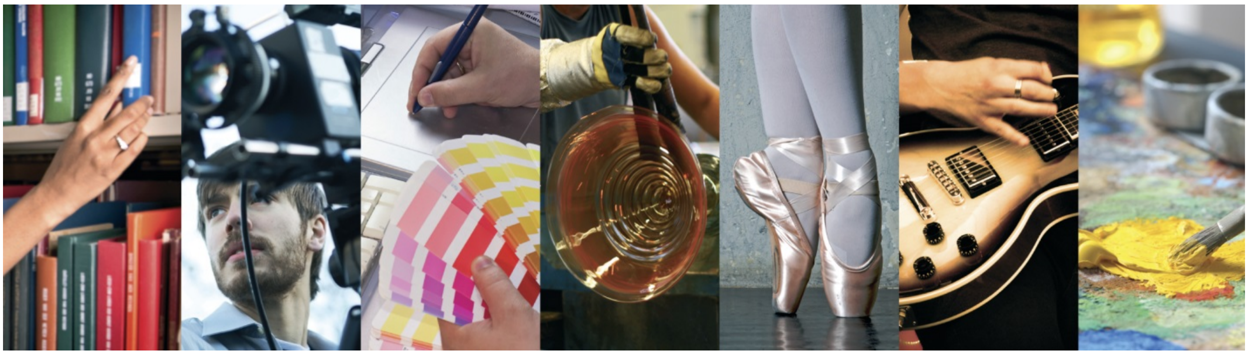
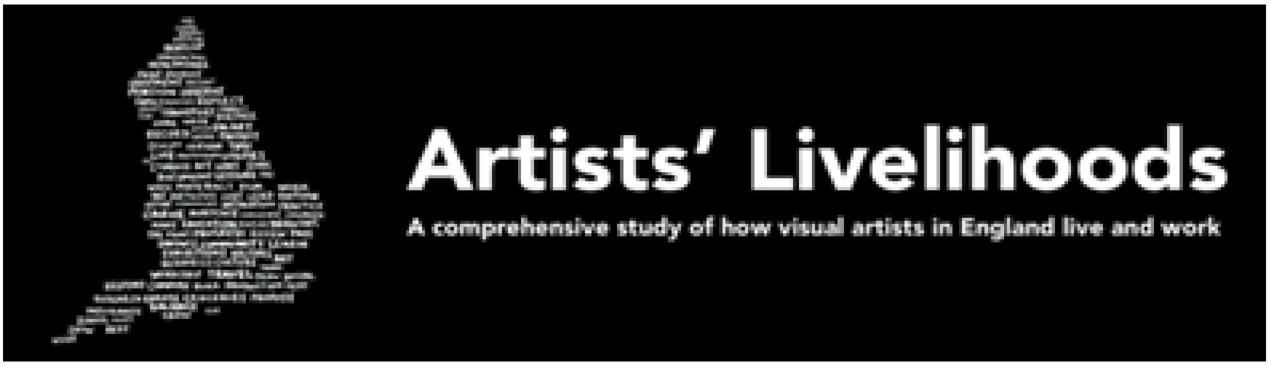


Livelihoods of Visual Artists – Summary Report

Prepared by TBR's Creative & Cultural Team

14 December 2018



TBR has delivered this research with support from a-n The Artists Information Company and James Doeser. It was funded by Arts Council England.

The project has benefitted from extensive engagement with a number of organisations who a-n brought together to form a Steering Group of project partners. The Project Partners have contributed significantly to the scoping stage, survey design and launch, and discussing areas for the analysis to investigate. TBR would like to thank the project partner organisations in particular for helping to deliver a successful survey:

- Association for Cultural Advancement through Visual Art (Acava)
- The Art House
- Artists Interaction and Representation (Air)
- Artists' Union England
- Artquest
- Axisweb
- Crafts Council
- Contemporary Visual Arts Network
- DACS
- DASH
- Engage
- East Street Arts
- Live Art Development Agency
- National Society for Education in Arts and Design (NSEAD)
- Shape Arts
- SPACE Studios
- Voluntary Arts Network

Contents

1. Background to the research and what it set out to achieve

This research study was undertaken in order to address important information and evidence gaps in relation to the visual arts. A large-scale national study of the livelihoods, careers and needs of visual artists in England had not been carried out in the previous decade, therefore this study aimed to refresh knowledge and understanding of visual artists in England. The research study aims to inform the future work of the wider visual arts sector including Arts Council England and the Project Partners.

The study is designed to provide evidence against four key research aims, as follows:

1. To understand the challenges and barriers faced by visual artists that prevent them from realising their full potential.
2. To understand how social, cultural and environmental factors such as employment status, education, age and gender, affect the career and talent development of visual artists, and the implications of this for workforce diversity.
3. To understand where visual artists are located and the factors which affect the movement and retention of artists between the regions, London and internationally.
4. To understand the variation between different practice art forms within the visual arts and their relationship with the Creative Industries.

This document is one of four report outputs generated by the study. Here we provide an overview of the study findings and provide a narrative to describe what was found about the livelihoods of visual artists in England in 2015.

2. How the research was conducted and key caveats

2.1.1 Three stages of research

This study involved three key research stages: a review of literature and existing data; a large scale online survey of artists focused on gathering quantitative data, and; a qualitative research phase involving five focus groups held in Newcastle, London, Birmingham, Bristol and Cambridge (attended by 39 visual artists). High-level project steering, advice and insight were provided by the Project Partners throughout – and they played a crucial role in disseminating and publicising the survey to stimulate responses.

The mixed methods and three-pronged approach to the research ensured that a range of quantitative and qualitative data was produced, synthesised and analysed.

The advantages of collecting and combining quantitative and qualitative data from both primary and secondary sources are as follows:

- The value of exiting research and evidence is maximised and allows for the targeting of resources on filling gaps in such evidence. This maximised the added value of new research work and reduced duplication.
- Numeric data, which provides a mechanism to quantify features and characteristics of the visual artists' workforce, is then complemented by qualitative data which seeks to further elucidate these characteristics and explain how or why they exist. This increases the insight that a research project generates and therefore deepens understanding.

2.1.2 Online survey methodology

One of the most significant challenges in conducting a survey such as this one is that there is no robust, accepted estimate of the size and profile of the visual artists' population in England. In this situation, it is not possible to design a sample frame to drive the survey response collection and conduct random sampling from a research population, nor is it possible to know with any certainty how representative the data are of the population surveyed as potential skews could be introduced through the process of survey promotion and dissemination. It is therefore not possible to weight the resulting data to represent an overall population.

An online methodology approach also carries some inherent weaknesses in that there is no control over the response rate, profile or veracity of respondents. Further, the distribution route of an online survey may not reach the full potential respondent base, or may under-represent groups who are not digitally savvy, who may have access issues which create a barrier to completing an online survey, or who are simply disinclined to take part in online surveys.

With this in mind, our online survey was completed following a detailed design phase and pilot test with 10 visual artists. The survey was disseminated by visual artist focused organisations and membership bodies who were asked to promote the survey to their members and networks, principally through social media, promotion on websites and a significant number of emails sent direct to artists via Project Partners and sector specialist bodies. The strengths of this approach are as follows:

- The network of organisations that assisted in the promotion of the survey have existing relationships and a standing within the visual artists' workforce which meant that a large volume of responses was anticipated (and indeed achieved).
- The promotional channels used – especially social media – were likely to increase the exposure of artists to the survey links.

The resulting number of respondents to the survey (2,007 visual artists) represents the largest ever survey conducted in England of visual artists in terms of sample sizes and provides a strong baseline from which further longitudinal research could be based.

Note that the survey was run during Spring 2016. Much of the data therefore relates to the status and characteristics of artists at the time they completed the survey. It should be noted that data questions on incomes and costs were asked with reference to 2015.

2.1.3 Interpreting the research

These strengths and weaknesses should be borne in mind, however the report is written based on the assumption that the data captured are representative (bearing in mind the constraints described above) of the artists' workforce.

The data generated by the survey and focus groups represent the outcomes of an attempt to comprehensively characterise and understand the population of visual artists working in England. There are inevitably going to be parts of the sector that this study did not reach as well as others: those that (for whatever reason) do not recognise themselves to be part of an artist 'workforce'; those that didn't have a peripheral connection to the organisations we used to distribute the survey; and those who see the Arts Council and the steering group organisations as not relevant to them.

However, the steering group represents a broad range of artforms and demographics and we have good reason to think that the respondents to the survey broadly reflect the constituents of the organisations that were part of the Steering Group for the research.

3. Findings from the review of literature and existing data

A Literature Review was undertaken at the start of this project. This brought together a range of datasets considering visual artists, and surveyed a vast literature covering the topic of visual artists' livelihoods. From this we were able to generate a fuzzy picture of the visual artist workforce. Given how important this element was to providing context for the wider study, it was agreed it should be a major objective to deliver better data about the nature, characteristics and demographics of the visual artists' workforce in order to bring our understanding of the sector into sharper focus.

3.1 Defining the artists' workforce

Within the existing research, we found there was no one-size-fits-all definition of visual artists or the term 'artist'. In many cases, the definition of an 'artist' was often based on self-definition or a value judgement. Identifying artists within the standard statistical frameworks for measuring and characterising workforces was problematic.

We also see that in studies into the economic impact of the arts, such as that by CEBR for Arts Council England, the broad economic impact of the arts and cultural sector is acknowledged but individual artists are largely invisible and their role and importance are seldom mentioned.

3.2 Workforce diversity

One theme gaining significant focus at present – for example, as evidenced by the Arts Council's Creative Case for Diversity campaign – is that of workforce diversity. Available estimates of the diversity of visual artists indicated that they tended to be older than the average workforce and that women were well represented (relative to the national workforce as a whole). However, the proportion of visual artists from a BAME background was found to be lower than in the general workforce population; the same was also true of disabled visual artists[i]. This existing insight indicated that the visual artists' workforce was not as diverse as it might be and that work should be done to understand the causes and drivers of this.

The existing research base was also lacking in evidence regarding other demographic factors beyond gender, age, disability and ethnicity. For example, an insight into social background, education levels, marital status and caring responsibilities would allow us to further understand other factors influencing the diversity of the visual artists' workforce.

Another significant gap in the existing evidence was there is little disaggregation of the visual artists' workforce into relevant groups. For example, and of great relevance to this study, there is little information on visual artists' demographics by different sub-art forms – an issue this study has been designed to examine.

3.3 Barriers to career progression

Moving beyond existing insight into the nature of the visual artists' workforce and considering the subject of artists' livelihoods, three areas of strength emerged in existing research: the studies by a-n to support the Paying Artists campaign[ii], the long-running series of reports authored by Professor David Throsby[iii] (and colleagues) tracking the fate of artists in Australia, and the work of Hans Abbing[iv], a Dutch artist and economist. Our research has been designed and delivered to complement and validate these studies.

These evidence reports indicated that the principal barriers to developing and continuing a career as a visual artist were financial: low payments for work, expectations that visual artists will work without pay and the cost of materials and studio space all contribute to visual artists earning less in comparison to other similarly qualified careers. Previous surveys of visual artists undertaken by policy makers, funders or sector bodies have found that visual artists' earnings from their art are low: a-n and AIR's Big Artists Survey[v] found that the average annual turnover visual artists made from their practice was around £9,000. However, evidence suggested that visual artists are not solely motivated by financial reward and instead are seeking to achieve other goals such as industry recognition and profile-raising. The existing evidence suggests that, both in the existing economic climate and in the longer term, visual artists face a range of economic challenges, which are likely to have an impact on decisions about beginning or continuing a career as a visual artist.

Existing research also indicated that income is low for art practice and the nature of work can be unstable and sporadic. It identified these factors as important drivers behind many artists supplementing their income with other jobs.

Importantly, the existing evidence identified the following as the three key barriers to career sustainability: lack of work opportunities, lack of financial return, lack of time to spend on artistic practice[vi].

3.4 Factors facing artists in different parts of the country

Prior to launching our survey we undertook a review of secondary data sources, including the ONS Annual Population Survey as well as data provided by Arts Council England. Whilst not a complete census of the population, these datasets represent the most comprehensive national level data available and provided a benchmark for our survey sample. When it comes to understanding the geographic location of artists across England, existing research told us that artists are not consistently spread around the UK. This understanding laid the groundwork for the geographical element of the study, which was targeted at identifying and comparing the issues facing artists in different regions as well as exploring the extent to which artists find opportunities to work in different regions. The study has also assessed the geographic location of respondents to the survey, by region.

The existing evidence identifies that some locations are home to clusters of artists. London has historically been understood to be one such location, with the North West, South East and South West also being home to comparatively large numbers of artists relative to the scale of the overall population in those regions[vii]. Whilst the existing evidence pays some attention to different challenges and issues in different regions (such as studio rent prices) there was little in-depth insight into these differences, nor regarding how mobile artists need to be in order to access markets and opportunities. These topics were therefore explored in this study.

3.5 Visual artists' work relationships with the Creative Industries

Assessing the wider value of the visual arts sector in terms of the contribution it might make to other industries, not least of which are the creative industries, is important.

In terms of creative industries specifically, existing research provides evidence that such interactions and relationships do exist. Whilst many artists take second jobs in non-art areas, some supplement their income with arts-related jobs (for example, in teaching art, working for organisations within the cultural sector or those within the creative industries) as well as providing an income supplement, such roles can also assist in career development through building a professional network or gaining insight and experience[viii]. However, the existing evidence predominantly focused on an assessment of the need for artists to take second-jobs.

3.6 Conclusions arising from the existing evidence

In conclusion, the literature and data review demonstrated that whilst a growing body of relevant research does exist, it does not comprehensively address the research aims and therefore supports the need for a study such as this one. Some specific questions which are not addressed by existing evidence but are highly important in addressing the research aims of this study are as follows:

- How do incomes and livelihoods of visual artists differ between different social and demographic groups and different sub-art forms?

- How do barriers, opportunities, challenges and enabling factors differ between different social and demographic groups and different sub-art forms?
- How do incomes and livelihoods of visual artists differ between different regions of England?
- How do barriers, opportunities, challenges and enabling factors differ between different regions of England and movement between them? And also mobility between locations
- What evidence is there that spillovers from the Visual Arts to the wider Creative Industries exist and what form do these take?

The primary research undertaken as part of this study has been designed to address these questions, amongst a host of others. The key findings are presented below.

4. What does new evidence from the online survey and focus groups tell us?

The key findings from the online survey and focus groups are now discussed within a structure which responds to the four research aims of the study.

4.1 The motivations, challenges and barriers faced by visual artists

The survey provides a comprehensive picture of artists working in England, offering general themes and characteristics in order to describe a baseline. In addressing the research questions, the survey has gathered data on a number of important characteristics which allow for a more developed and insightful analysis. These include:

- Definitions of self-identified sub-art form – this informs our thinking about use of labels and classification
- Visual artists' demographics and geographic distribution.
- Self-perception of career stages and trajectory.

4.1.1 Self-identified categories of art form

One of the key characteristics of interest to this study is the artform practiced by visual artists. The survey captured this information through the use of a self-reported open question, as follows:

"Please tell us in your own words the primary artform and any additional artforms which made up your practice in 2015."

Two boxes were provided to accommodate the primary art form and additional art form(s).

This question produced an extensive and wide-ranging listing of art forms which were then cleaned and standardised to produce a list of 115 art forms. In order to provide a useful framework for analysis, these individual art forms were then brought together, in collaboration with Arts Council England, into what became known as 'sub-art form' groups.

In order to ensure that analysis was sufficiently robust to provide reliable results, the groups were formed to contain a minimum of 50 responses. This process generated a final list of 14 sub-art form groups.

4.1.2 Motivators

Our survey further confirmed that what most artists seek to achieve is artistic fulfilment and personal well-being – they are not primarily motivated by financial rewards though this does feature as the third most regularly cited motivator. The key motivating factors across visual artists generally are: artistic fulfilment (70% of artists identified this in their top three motivators), personal wellbeing or enjoyment (38%) and financial remuneration (36%).

We also found that artistic fulfilment was the most frequently selected factor across all age groups, but was most important for the 50-59 group (75%) and less important for the youngest artists (60%). In addition, personal wellbeing or enjoyment was considered more important by disabled artists (46%) than non-disabled artists (37%). Whilst financial remuneration was considered the second most important factor for those aged 40-59 (40%) it was less important for the 19-29 year old group (21%).

Out of all the artforms, artists practicing ceramics (55%) or crafts (46%) were more likely to select personal well-being or enjoyment as a motivating factor.

4.1.3 Incomes

The online survey confirmed a number of findings present in existing research, especially research conducted by David Throsby in Australia, namely that the barriers that stood in the way of artists progressing their practice and spending more time on the work that they want to do, included the expense of materials, studio space and travel or accommodation. The major issue identified in our survey and confirmed in the focus groups is the level of income that artists are able to generate.

Our survey found that the mean average *total income* for artists across the UK in 2015 was £16,150 per annum, which places them into a category of workers that earn, on average, less than the national living wage for 2015 as defined by the Living Wage Foundation (£16,302 per annum outside London and £18,570 per annum within London). The average annual salary of full-time workers in the UK in 2015 was £27,600. Furthermore, 69% of artists earned a total income of £20,000 or less in 2015; this compares, for example, with 56% of musicians[ix] which are similarly understood to experience low incomes.

Further, the average income derived from *art practice* in 2015 was £6,020. Income from art practice therefore represents 36% of total income. However, two-thirds of visual artists earned less than £5,000 in the previous year from their art practice and only 7% earned more than £20,000.

Our research has also found that incomes vary according to different artist characteristics. For example:

- Female visual artists earn around £5,000 per year less than men with an average total income of £14,800 compared to £19,800. Male artists earn significantly more on average from their arts practice (£7,780) than women (£5,370). The gap in average annual income between men and women is significant for art practice earnings as well as total income. Although it should be noted that this is also the case across the UK workforce[x].
- The survey analysis also shows that artists with a disability have a significantly lower average total income (£11,330) than non-disabled artists (£16,600). Disabled visual artists earn less (£3,600) from their art practice than artists without a disability (£6,200).
- Average income from art practice does not grow in a linear fashion with age. Whilst average annual incomes from art practice rises steadily between the 19-29, 30-39 and 40-49 age groups – and indeed reaches a maximum in the 40-49 age group at £7,600 (per annum) – it then dips to £6,600 for the 50-59 age group and rises slightly to £6,900 in the 60+ age group.
- Visual artists who describe themselves as 'established' have the highest art practice incomes on average (£13,300). Early career artists (£3,200) earn less from their art practice than mid-career visual artists (£7,600) as do students (£1,500).

There is a notable difference in the level of art practice income across the artforms, with participatory/community/socially engaged achieving the highest mean average level of art income in 2015 (£8,250) and crafts (£8,120) the second highest. At the other end of the range, artists in the moving image sub-art form achieved the lowest art income in 2015 (£2,820).

When these results are tested for statistical significance, the following differences emerge:

- Art practice income for participatory/community/socially engaged is significantly higher than for photography, sculpture, textile(s) fine art(s), moving image, multi-discipline and painting.
- Art practice income for those working in craft(s) is significantly more than for fine art(s), multi-discipline and moving image.

There were significant geographical variations in the income levels and sources of income among visual artists across English regions. (These trends are summarised in section 4.3.)

Abbing described the art market as a winner-takes-all market based on evidence that indicates that a very small proportion of artists receive a large slice of the total artists' revenue. These statements are borne out by our research as well as that from Australia.

A very small proportion of survey respondents make a healthy living from their arts practice: our data show that only a tiny minority (2%) of visual artists earn more than £50,000 per annum from their art practice.

We also found that only 10% of visual artists believe that their art income alone provides them with enough to live on, and only 3% of these thought that the income allowed them to live ‘comfortably’.

4.1.4 Sources of income

The survey asked visual artists to indicate the sources of art practice income. The two most frequently named sources were private sales followed by Local Authority/public body commissions. These are each discussed in more detail below.

4.1.4.1 Private sales and private commissions

Our results suggest that many artists surveyed are raising income by selling work, evidenced by the fact that the most frequent source of income from their practice is from private commissions or sales. Of all visual artists in England surveyed, 50% stated they earn from ‘Private commissions’ and 31% from ‘Private Sales’ and yet the majority of respondents have very low levels of income. Also of note is that fewer than 5% of our survey sample said they had earned exhibiting fees).

The importance of sources of income varies across different groups of visual artists and the nature of the artform practiced will be a factor in determining the relative significance of specific sales channels. Our data show that private sales are especially important to artists practising Crafts and Painting/Drawing, for example.

In terms of career stage, the survey tells us that private sales are most important for visual artists who consider themselves to be established. In fact, the proportion of visual artists that state private sales to be a source of income increases by career stage from students (37%), through early career (44%) and then mid-career (54%) and then peaking in the established stage (65%) before tailing off for those visual artists that consider themselves to be in a lapsed or retired stage (38%).

Established visual artists are also more likely to indicate private sales to be one of their top three sources of income than those in other career stages. The most lucrative sources of income are from sales to dealers and from sponsorship/corporate funding, but only a small proportion of visual artists (12% and 3% respectively) in our sample gained income from these sources.

4.1.4.2 Local Authority/public body commissions

The second most common source of income, behind private sales, is local authority or public body commissions. However, we know from existing evidence that opportunities traditionally available to visual artists through local authority or public bodies are showing decline.

Local authority or public body commissions are most important to visual artists practising Participatory/community art, Music/sound and Performance art. Furthermore, local authority or public body commissions are more likely to be one of the top three most important sources of income for mid-career visual artists (24%) compared to students (7%), early-career visual artists (13%), established visual artists (20%) or lapsed/retired visual artists (12%). These findings suggest that visual artists find that throughout their career, the sources they can earn income from change as their practice develops and they move through the career stages.

As well as the influence of artform on the relevance of sales channels, there may also be a relationship between the sources of income that a visual artists benefit from and their interpretation of the stage at which their career is moving to, as the career stage was a self-defined classification in our survey.

4.1.5 Additional jobs and income

The study also reveals an important relationship between levels of income, other jobs that visual artists do to ensure they make ends meet and the time available to spend on art. In simple terms, the more time visual artists can spend on their art, the more they can earn from that art. But because incomes from arts practice alone are low, visual artists take other jobs to supplement their income, which in turn reduces the time available to spend on their arts practice.

The survey and focus groups tell us that 68% of visual artists have additional jobs with one in five having three or more different jobs. Within the group of visual artists with additional jobs, 43% have solely arts-related additional jobs, 23% have both art and non-art related jobs and 34% have solely non-art related jobs. This tells us that one-third of visual artists are not using their artistic skills to generate income outside of their art practice. Moreover, visual artists told us that additional jobs not only reduce the time artists spend on their art, but they can negatively affect an artist's creativity or productivity. Visual artists in the 19-29, 30-39 and 40-49 age groups are most acutely affected by this issue as they show the highest proportions of visual artists taking additional jobs (91%, 81% and 67% respectively).

Whilst additional jobs are crucial, visual artists call on financial support and income from a range of other sources to support their livelihoods. The additional sources which are most readily accessed by visual artists include their partner's income (38% of artists), personal savings (37%), support from family or friends (23%), tax credits (16%) and state benefits (10%). This topic of artists 'subsidy' is worthy of further research to both quantify it and to investigate key mechanisms of subsidy.

4.1.6 Time spent on artistic practice

The other side of the supplementary income coin is the amount of time that can be spent on art practice. In the survey, one in five visual artists (20%) indicated that they were able to spend as much time as they hoped to on their art. Mirroring the results on additional jobs above, the survey indicated that those visual artists aged up to 49 were least likely to state that they spent as much time as they hoped on their art practice in 2016 (92%, 85% and 81% across the three age groups, respectively). This clearly demonstrates that taking up additional jobs restricts a visual artist's ability to spend sufficient time on their art.

The following groups of artists were less likely than other artists to have spent the amount of time that they had hoped to on their art practice in 2015: those based in London; those earning less than £5,000 from their art; those practising in photography, printmaking and textiles, and; artists from BAME backgrounds.

There is some difference in time spent on practice between artists with or without dependent children/caring responsibilities, or between married and single artists. However, these differences are not statistically significant. The analysis also indicates that there are no statistically significant differences in the hours spent on art practice between artists from BAME backgrounds (or not), artists with a disability (or not) or artists across different regions.

4.1.7 Costs and barriers

The costs faced by visual artists are significant but do vary across different artist groups. The survey shows that the most common expense is consumables and materials. While studio costs were only relevant to fewer than half of our respondents, where they are incurred the average monthly rent is the largest monthly outlay for these artists.

Delving deeper into the data we see that studio and workspace rents are most significant for students and mid-career visual artists, whilst established visual artists spend more on materials and much more on childcare. Fine artists and sculptors were most likely to indicate that they incurred expenses for studios.

There were significant geographical variations in the expenses incurred by visual artists in different regions and these trends are summarised in section 4.3.

Previous research had shown how visual artists are put off from applying for funding. The discussions within our focus groups re-emphasised this, with artists stating that they find the process of applying for grants to be overly-bureaucratic and time-consuming.

Debts are also a concern for some visual artists, with the cost of their practice and low incomes not helping. A number of survey respondents expanded on these concerns during the survey and provided comments such as:

> "[On not being able to attend courses and events] I am in a vicious circle - I had to take a full time job in order to pay my degree debts (I have never received any funding or any loans or financial support whatsoever) and most art events are staged during the working week."

> "The year [2016] started well with a residency - although: it was unpaid and left me further in debt. But the experience was positive and restorative. & inspiring, a future collaboration is planned. Poverty is a major fear. A debt spiral seems inescapable"

> "[I am] Settling into working life at a level well below my potential due to student debts needing to be paid."

> "My art practice has existed in a state of impending extinction ever since I started practicing; I have always fought, doggedly, to carve out the space and resources to allow me to practice. However - after many years of funding my own work - I am now so cripplingly indebted (despite having a fixed part-time job) that my ability to carry on has reached crisis point and I have been faced with the very real prospect of reluctantly having to stop making work"

Thus far we have touched on a number of key barriers that emerge from our analysis. The existing evidence identified that barriers to visual artists continuing a successful career included a lack of work opportunities, lack of financial return, lack of time to spend on art and the cost of materials, equipment and studio space. One of our survey questions addressed this issue directly, asking what were perceived to be the barriers to visual artists continuing a successful career.

Our research shows that the biggest challenges reported by visual artists are a lack of financial return (80%), and a lack of time to practice their art (62%) and more than half reported lack of access to funding or financial support as a barrier. In addition, a lack of time to practice art was identified as a bigger barrier for younger visual artists aged 19-29 and 30-39 and its significance diminishes as visual artists get older.

4.2 Social, cultural and environmental factors and their effect on career development and workforce diversity

The findings above contain numerous references to the differences we have observed across different groups within the visual artists' workforce. The study has sought to build on this by investigating three specific aspects of the visual artists' workforce:

1. The demographic profile of the workforce in order to examine workforce diversity.
2. The factors that visual artists consider to be important to developing their career and their practice and also to them considering themselves to have reached the 'established' stage of their career.
3. The features and characteristics of two specific groups of visual artists from within the workforce in order to delve deeper into the data and to examine whether these characteristics explain other outcomes that those visual artists experience.

4.2.1 Demographics and workforce diversity

According to the ONS Annual Population Survey (July 2014 - June 2015) 7% of the arts workforce are from a BAME background, which is less than the overall economy (10%, when measured as a proportion of the economically active working age population).

Our survey showed that, overall, the profile of visual artists is less diverse than the working population in England, with 6.5% identifying as BAME (and a further 5.5% preferring not to say).

The ONS Annual Population Survey estimates suggest that overall 5% of the visual arts workforce have a disability (defined within the Disability Discrimination Act (DDA) or as work limiting). While our survey population shows 8% of respondents with a disability (and a further 7% preferring not to say), when compared to the 13% of economically active people in the general working population reporting a disability in England[xi], our results show disabled people are still under-represented in the visual artists' workforce.

The most striking disparity between the visual artists' workforce and the UK working population is gender, with men substantially under-represented in the survey sample. Younger adults were also under-represented (compared with the workforce generally).

However, an imbalance in potential earnings is evident in our survey where women, who make up 72% of the visual artists, earn under £1,000 a year from their practice and only 2% of those who earn over £50,000. When the visual artists' workforce is analysed by career stage, the data suggest that the gender balance changes as visual artists develop. For example, in the student cohort there are 3.7 women for every man, but in the established visual artists group, the ratio is 1.9 woman for every man. It would appear that as careers progress, more female visual artists are likely to drop out. Across the visual artists population, women also spend five hours a week less on their practice than men.

Visual artists are extremely well educated in comparison to the wider population, but there seems to be no positive correlation between education and levels of income from art practice. This is not conclusive proof of a lack of return on investment from completing education and training courses, however. It may be driven by the very different educational profile of visual artists across different age groups and the income-generating ability of visual artists by age.

Young visual artists aged between 19 and 29 are significantly more likely to hold a Bachelor's degree (70%) than visual artists in all the other age groups (where the proportion ranges from 31% to 36%). One would imagine that were this study repeated in ten years' time, the proportion of visual artists in the 30-39 age group with a Bachelor's degree would be higher than it is today, in keeping with the recent trend of more people studying at university across the population as a whole.

A longitudinal tracking study would be required to fully assess the education levels of visual artists and the career paths of degree educated visual artists. This could compare education data trends between visual artists and the wider population across different ages and career stages.

4.2.2 Factors influencing artistic development and becoming established

Our background research and scoping discussions with the Steering Group clarified that there were a range of motivations driving visual artists to pursue, develop and continue their career and a number of factors which were often seen as important to unlocking career development. To investigate which factors were viewed as important in enabling career development, our survey asked artists to rank their top three factors and state their single most important factor, from a selection provided. The findings indicate that the key factors were: having the opportunity to exhibit perform or publish at a critical time (48%); support from family/friends/peers (43%); and artists' talent (34%).

However, when we look at key groups within the visual artists' workforce, we find that these influencing factors vary in importance. For example, the youngest visual artists aged between 19 and 29 are more likely (compared to the average for all visual artists) to indicate that: their general education (29% cf. 18% on average); the opportunity to exhibit, perform or publish (55% cf. 48%); support from an arts centre (21% cf. 14%) or a teacher/mentor (22% cf. 13%); or a lucky break (15% cf. 10%) were influential in developing, continuing and sustaining their practice.

Visual artists in the 30 to 39 age group were more likely (than artists in other age groups) to have been supported by an arts centre and through financial assistance at a critical time in their career. Female visual artists are more likely than male visual artists to indicate that support from friends, family and peers was influential in their practice development, continuation and sustainability (46% cf. 36%) whilst male visual artists were more likely (than female visual artists) to identify that their talent was key to this (40% cf. 32%).

The survey also explored the views of visual artists on the factors that have led or might lead them to consider themselves established in their art career. Visual artists indicated that the key factors were being able to spend a majority of time on artistic work (19%), achieving their first big professional engagement/show/exhibition as an individual (18%), and earning their first income from art practice (11%).

4.2.3 Investigating specific socio-demographic groups

One of the opportunities presented by the survey dataset is to examine and compare the characteristics of different groups of artists. These groups can be defined in many ways – by their geographic location, age, career stage, income levels and so on. In reporting this study, we have undertaken analysis focused on two specific groups of artist: those whose parents went to University and those that indicate they are intending to cease, and/or who are not sure if they will continue their artistic practice in 2016.

These two groups were chosen because they displayed some interesting differences when compared to visual artists as a whole. They represent interesting 'demonstrators' for more in-depth analysis which could be undertaken on the datasets generated by the study, providing an example of the many ways the data can be analysed. There is therefore a significant opportunity to investigate other groups of visual artists in a similar way and we note this as a potential area for future research both using the data collected in the survey and through further primary research.

4.2.3.1 Visual artists whose parents were degree educated

Data on the education status of visual artists' parents' education were collected in the survey to provide a proxy indicator for the socio-economic status of visual artists. This indicator is often used in research studies investigating links between socio-economic status and outcomes (e.g. health[xii]). We selected this indicator for this study, as it is a non-intrusive way of collecting a measure of socio-economic status in a consistent way, avoiding the risk of survey respondents answering subjectively and with different interpretations.

Visual artists whose parents were degree educated have higher average total incomes than the group whose parents were not degree educated, earning an average of £16,235 per year compared to £15,750. Looking at the distribution of incomes, a higher proportion of artists whose parents were university educated achieved a total income of £15,000 or more than visual artists as a whole.

There are other differences between this group and visual artists as a whole. For example, the data show that significantly more visual artists whose parents were degree educated worked in additional jobs (77% of this group). Conversely, the data also show that significantly fewer of those whose parents *were not* degree educated worked in additional jobs (63%) compared to visual artists as whole (68%).

Furthermore, visual artists whose parents were degree educated and worked in additional jobs were significantly more likely to work in unpaid or voluntary roles in their additional jobs (20% of this group) compared to those whose parents were not degree educated (13%) and all visual artists (14%). When asked if they had taken any unpaid work specifically to develop their arts career, significantly more visual artists with degree-educated parents had undertaken unpaid work experience (9% of this group) compared to the second group (5%) and all visual artists (6%).

Conversely, significantly more visual artists from the group whose parents *were not* degree educated stated they did not undertake any unpaid work to develop their career. These data reflect comments made by artists during the focus groups and in the survey, that unpaid work experience is important to develop contacts, networks and opportunities in the visual arts sector and that these are more readily available to those who can afford it.

The data show that as well as being more likely to have undertaken unpaid work experience, visual artists whose parents are degree educated were more likely to have benefitted from financial support from family and friends (31% of this group) than visual artists as a whole (23%). The group whose parents were not degree educated were actually significantly less likely to depend on income from friends and family, and more likely to rely on formal loans and state benefits to supplement their incomes. In fact, the data suggest that personal and family wealth appears to facilitate unpaid work experience across the board. We see that of all visual artists who had unpaid work experience or an internship to develop their career, the top means of supporting themselves were personal savings, their partners' incomes, and support from family and friends.

The survey provides data on the geographical spread of these groups. A significantly greater proportion of visual artists whose parents were degree educated live in London, whilst of those whose parents were not degree educated significantly fewer live in London.

Further interrogation of this dataset, and indeed further research, will be required to look at other differences in characteristics between socio-economic groups. For example, whilst the group whose parents were degree educated are younger, this may simply reflect the upward trend in the proportion of young people attending university each year during the last 30 years, meaning younger visual artists are more likely (than older visual artists) to have parents that have experienced higher education. Similarly, it may be the age profile of visual artists in these two groups that explains the differences in the numbers taking additional jobs, unpaid positions and internships, and relying on family support (see section 4.1.5).

4.2.3.2 Artists intending to cease their practice

The full survey analysis shows that 94% of visual artists think they will continue their career as a visual artist in the short term. We have looked in more detail at the remaining 6% - those that are 'likely to cease' or are not sure if they will continue – and we find that the most important reason for planning to cease is due to financial pressures.

However, when we compare the responses of this group to questions about barriers to developing their art practice against responses for all visual artists, we see a significantly higher proportion of 'likely to cease' visual artists identify with the following factors: 'difficult access for artists with a disability', 'lack of access to funding or other financial support', and 'lack of time for art practice due to other pressures and responsibilities'. This demonstrates that whilst financial pressures are a very prevalent driver of art practice cessation, there are complex issues which may drive the decision. Interestingly, almost a quarter (23%) cite 'lack of networks' as being a driver of their decision, which could be considered a second driver associated with location, alongside 'lack of opportunities in my current location'.

4.3 The location of visual artists and the factors which affect their career development, movement and retention

Importantly, peer networks provide other forms of support and motivation for visual artists. For example, 67% of visual artists indicate that they hear about work opportunities through arts networks and membership organisations. Furthermore, 10% of visual artists indicate that their perception of becoming established in their arts practice would be influenced by industry, peer or public recognition of their art. Finally, 35% of visual artists indicated that engaging with other artists and collaborators was one of their three most important reasons for continuing their arts practice.

The focus group elicited statements that support these findings, with visual artists indicating that peer groups and networks were fundamentally important to their art career in terms of experience and knowledge sharing, learning new techniques, information signposting and accelerating artistic development.

4.3.1 Concentration of visual artists in London and regional patterns

Previous surveys of visual artists have found that artists are concentrated in London. This finding is supported by our research, with 29% of survey respondents living in London compared to 16% of the population as a whole. This indicates that London remains a central hub for visual artists. Table 1 shows the geographical spread of our survey respondents across nine English regions.

Table 1: Location of survey respondents

Region	Percentage of respondents
London	29%
South West	17%
South East	15%
North West	9%
Yorkshire and Humber	9%
West Midlands	6%
East of England	6%
East Midlands	6%
North East	4%

TBR ref: W1/S1

We are able to observe clusters of sub-art forms in each region from the data:

- London has significantly more visual artists who define themselves as painters or moving image artists and fewer whose main artform is craft or textiles.
- The North West has proportionally more visual artists who define themselves as photographers, as performance artists and participatory/community artists.
- The West Midlands has the highest proportion of visual artists who define their main artform as craft(s).
- The East of England has the highest proportion of visual artists who define their main artform as sculpture.
- The North East has the highest proportion of artists defining themselves as visual artists and as multi-disciplinary practitioners.

4.3.2 Income and costs by location

4.3.2.1 Income

Unsurprisingly, visual artists in London reported the highest average total income, followed by the other southern regions. This difference is statistically significant; in all other regions respondents had a lower income[xiii]. Furthermore, in all regions the mean total income of visual artists is lower than the average income of all residents on average.

Whilst total income by regions was as expected (due to comprising earnings from other jobs in addition to art practice) differences in average income solely from art practice by location were not statistically significant once sample sizes were taken into account.

Looking at *how* artists in different regions earn money from their practice demonstrates some variances in the types of earning opportunities. Arts practice income from local authority or public art commissions or grants was most prevalent among visual artists based in the North East, as were fees earned from participatory practice and residencies. Visual artists in the North East were the least likely to earn their arts practice income from private sales.

Arts practice income from private sales or sales to intermediaries/dealers was most prevalent among artists based in the South West, whilst arts practice income from online and digital activity/sales was most prevalent among artists based in Yorkshire and Humberside.

Significant regional differences in the proportion of artists earning from private commercial activity include:

- Private sales: The North East has a significantly lower than average proportion of visual artists saying they earn from private sales (38%), whilst the South West has a significantly higher than average percentage (58%).
- Private commissions: London is the only region with a significant difference, with a lower than average proportion of visual artists saying they earn from private commissions (26%).
- Sales to intermediaries/dealers: The South West also has a significantly higher than average percentage (15%) of visual artists earning from sales intermediaries/dealers.
- Online & digital sales: London has a significantly lower than average proportion of visual artists saying they earn from online & digital sales (13%), whilst the South West has a significantly higher than average percentage (22%).
- Auction sales: Only 1% of all visual artists earn directly from auction sales but the proportion of artists earning income form this source is higher in both the East Midlands (5%) and South East (2%)

4.3.2.2 Costs

Gentrification and displacement were common themes in the focus groups. London remains a draw and was perceived by visual artists in the focus groups to have the highest proportion of opportunities for visual artists. The survey findings indicate that artists in London are also more likely than those in other regions to access opportunities locally. It is also still viewed as the place with the greatest and most diverse range of stimulation for visual artists. However, the cost of living is increasing the financial challenges faced by visual artists, despite the fact that our survey indicates that incomes from art practice increased between 2014 and 2015.

Our focus groups felt the gentrification effect had strengths and benefits (a renewal and refreshment of places that were cheap to live in) but that policymakers at a local and national level were slow to respond to these trends. Visual artists expressed the view that place-making and regional cultural development needs to invest both in support for visual artists to draw them to work and live in particular areas, but also needs to invest in high quality cultural provision/infrastructure in those areas to maintain a level of quality and mutual benefit:

> "The growing expense of living and working in London has made my art practice untenable in terms of earning a living exclusively from it."

> "Artist studios in London are increasingly being knocked down and transformed for other uses. Every artist I know (myself included) has been moved out of their studio due to commercial development and it appears that no thought is given as to how London will support artists in terms of space. It is becoming extremely difficult to find space to work and soon will be impossible."

> "It's becoming impossible to find affordable studios to rent in London. Studios are being transformed into luxury apartments. Artists are being moved back outside of the city and this is cultural and ethical problem. My gallerists do sell my work but take sometimes up to 8 months to pay me.... I think the relationship between gallerists and artists isn't always very healthy."

> "The greatest obstacle to my career is lack of exhibition spaces in London aimed at emerging or mid-career artists. The capital is dominated by the international galleries. London needs more artist-led or public spaces aimed at emerging or mid-career artists."

> "The cost of housing and cost of living in London as an artist, most artists have to live in London as that is where all the work is, is a real strain financially. When you find you are working to pay the rent every month this is not a good place to be"

Interestingly, when comparing across regions the perceptions held by visual artists of their expenses with the expenditure data they have provided in the survey, the story appears somewhat mixed and contradictory. For example, North East-based visual artists are more likely to identify studio or workplace rent as an expense whilst South East artists are less likely to do so. However, data provided by visual artists on their costs show that artists in the South East face the highest monthly rents of any region, and those in the North East one of the lowest.

Significantly more artists in the North East than in other regions state that transport and accommodation costs are an expense, yet the data show the actual costs in the North East are the lowest out of all regions. The highest travel and accommodation costs were reported by artists in the South East. The factors driving these costs are not evidenced in the survey data. For example, whilst we could speculate that studio costs in the South East are due to its proximity to London or that travel costs in the South East are due to train travel into the capital, further targeted research would need to be undertaken to gain a deeper understanding of these issues.

4.3.3 Movement and re-location of visual artists

The survey did not enquire directly about historical movements of visual artists in England or whether they have relocated in the past. However, as a snapshot of visual artists' careers in 2015, we can analyse where artists live (as in section 4.3.1 above) and where they find opportunities to earn from their practice.

The focus groups did touch on the subject of relocation, however. Attendees of the focus groups told us that it is not uncommon for visual artists to move to London from elsewhere to access the arts community and work opportunities. However, it was also indicated that the prohibitive costs of living and working in London means some visual artists have either moved out to other regions or are thinking about doing so. (Average visual artists' total income is the highest in London of all regions (£19,000 per annum), just above the level that represented a 'living wage' for London in 2015.)

A number of artists who responded to the survey also provided opinions in their own words describing relocations (within responses to an invitation to make any additional comments at the end of the survey):

> "Yes, when I was younger I lived in London and made a reasonable living as a maker. Moving to the southwest, and not being able to travel to London very often, had a major impact on sales and profile."

> "Having worked in the South East and North West, London and the south east appears to be significantly better funded than the rest of the UK. As a creative to need to move to London to find opportunities is a massive missed opportunity for the UK."

> ''It has been easier to sustain my practice (financially) outside of London, the opportunities and organisations are fewer in number in the region, but the ones that do exist seem very much more supportive to artists. I would like to see more opportunities and infrastructure being invested in and developed outside of London''

> "I don't earn enough money from my arts practice to live on. I had to relocate from London to North Yorkshire so that I would have lower living costs and still be able to maintain my practice."

However, the evidence tells us that visual artists located outside of London find they are likely to feel more inhibited by a lack of local opportunities and buyers and therefore have to travel to find work. The survey finds that visual artists in the North East and West Midlands regions perceive that they are the most affected by a lack of opportunities in their local area (65% of visual artists and 55% of visual artists respectively identify this challenge).

Visual artists living in London perceive they are least affected by this issue (23%), supporting the view that there are more opportunities for visual artists in London than in other regions. London along with Yorkshire and Humberside were the two regions with a significantly higher proportion of visual artists than the visual artists' national average finding most of their opportunities in their home region.

London remains a place for younger artists. The survey data show that London has proportionally more visual artists under the age of 40, and fewer over the age of 50. The survey data show that the East of England has proportionately more visual artists aged 40-59, and fewer aged under 40.

Other significant differences in the experience of barriers in different regions were:

- *Lack of financial return from practice* was the most important barrier across all regions, but was less frequently reported in the West Midlands (71%) compared to the overall sample (80%).
- Artists in London considered *lack of funding or other financial support* (64%) and *lack of time for art practice* (68%) to be more important barriers than artists in other regions (56% and 62% overall respectively). These findings may however be more a factor of age, as London has the highest proportion of younger artists.
- *Lack of support and encouragement from family or friends* was reported more in East Midlands (11%) than generally (5%).
- *Lack of qualifications* more important in East of England (8%) than generally (3%).
- *Discrimination on the basis of ethnic background* was more important in London (5%) and less in the South East (0%) than overall (2%).
- *Discrimination on the basis of gender* was felt more in London (10%) and less in the North West (2%) than generally (6%).
- *Discrimination on the basis of disability* was felt more in East Midlands (5%) than elsewhere (2%)

Although there is little variation in the number of hours that visual artists report working on their arts practice across the regions, there is some variation in the extent to which visual artists are able to work as much as they like. Despite having access to most opportunities, significantly fewer visual artists in London (18%) were able to work on their practice as much as they would hope.

4.4 Visual artists' work relationships with the Creative Industries

4.4.1 Additional jobs

Beyond the issue of income supplements, the subject of second and other jobs is one of interest to us because it allows us to begin to explore the relationship between visual artists and the wider cultural and creative industries, outside of their art practice. Although additional jobs are essential for financial survival for many visual artists, jobs in arts-related or creative industries jobs can also assist in building networks and insight, and capitalising on visual artists' knowledge and skills. Furthermore, when a visual artist employs their skills in these industries, they are adding to the value that those activities create for the economy.

To investigate this relationship between visual artists, the wider cultural and creative industries we have looked at the type of additional jobs visual artists have. Of visual artists who have additional jobs, more than 60% have at least one artform related job most commonly as a lecturer/academic (11%) or arts teacher (11%). Teaching and academic careers could be viewed as a good fit with the key drivers identified for visual artists (see above) as they provide a secure income, an opportunity to use arts expertise and by providing time to practice during academic holidays. However, existing evidence also suggests a decline in educational or local authority budgets which would normally support these opportunities.

Furthermore, amongst visual artists with at least one non-artform related additional job, our analysis of the occupations these visual artists identify suggests that around 20% of these jobs are still within the creative industries and the arts and cultural sector. (This is in addition to any art-related jobs in these sectors.) However, our survey did not gather data on the precise sectors that these jobs are applied to because of restrictions on the length of the survey. Therefore we are not able to definitively differentiate between creative industries and the cultural sector at this point in time; this represents an opportunity for future research.

Statistical testing was undertaken on sub-art forms where the survey generated a sample of 50 or more visual artists who had additional jobs. The only significant differences between artforms identified by this analysis are:

- Visual artists whose primary practice is painting are *more likely* to have only non-artform related jobs. This suggests that painters are less able than other visual artists to find additional income-earning applications for their artistic practice.
- Visual artists whose primary practice is moving image are *less likely* to have only non-artform related jobs. This suggests that their skills are comparatively more transferable.
- Visual artists whose primary practice is performance art are *more likely* to have both artform and non-artform related jobs.

Further work on these relationships with the creative and broader industries could be considered in the future to build on this evidence.

4.5 The role of education

Education appears linked to the incomes of visual artists. We see a significant difference in total income between artists without a degree (who earn on average £13,300 per annum) and artists with a degree (who earn on average £14,910) or post-graduate qualifications (who earn on average £17,660).

It is a fact that those with higher level qualifications earn more, on average, than those that do not. The results seen in this analysis may be explained by non-artform incomes, especially when considering that visual artists with degrees (Bachelor's or Postgraduate) spend significantly less time on their practice than artists without degrees. More artists with postgraduate degrees reported this to be a barrier although there is no statistical difference in time spent on art between artists with Bachelor's and Postgraduate degrees.

Lack of financial return was reported to be a significant barrier by 84% of artists with degrees while fewer artists without degrees reported this to be a barrier (73%). The reason for this is unclear, although it could be related to the higher income expectations of graduates, following their investment (of time and money) in their education.

Participants in the focus groups suggested that tertiary formal education was almost a requirement, rather than a choice. However, the value of time in art school was more than a paper certificate. The findings evidence that artists see a university education as offering other benefits in addition to learning a craft, including confidence, a peer group and mentor network.

Despite this there were also some negative feelings expressed about how useful education is to people seeking a visual arts career today. Headlines from the focus groups include:

- Artists feel that early education does not adequately support a potential career in the arts.
- University education delivers art skills but not necessarily business or career skills.
- University education is becoming increasingly prohibitive for aspiring artists.
- Alternative education opportunities are emerging for aspiring artists.
- Artists perceive class imbalance in educational opportunities for artists.

5. Conclusions and recommendations for further research

The study has achieved the creation of a detailed baseline, providing a snapshot of the livelihoods of visual artists in 2015. The breadth of data collected has enabled a range of analysis to be undertaken to make comparisons between different visual artists' sub-art form groups, demographics and regions, and an overview of the incomes, costs, motivations and barriers faced by visual artists in 2015.

5.1 Overview of key issues

As well as corroborating evidence in the literature and data review completed at the outset of this study, our survey data provides a greater depth of evidence on issues in the sector, as well as new insights. This section presents, first, a summary of the corroborating evidence and then an overview of the new findings, grouped by theme.

5.1.1 Corroborative findings

Whilst the survey was focused on gaps in the research evidence, it also captured data which has corroborated a number of findings from existing literature and research. In summary, these are:

- Incomes for visual artists are comparatively low.
- The visual artists workforce is large and evidences portfolio careers.
- Whilst augmenting their arts practice income, evidence shows that visual artists are juggling a portfolio of similarly low paid, precarious roles – creating a circle of high risk, low paid work around them.
- Multi-tasking between (particularly) non-artform related jobs and arts practice can be detrimental to creativity (as evidenced in focus group responses).
- Almost seven out of ten artists undertake additional jobs in order to supplement their art income. This not only reduces the amount of time they can spend on their art but it also has a detrimental effect on creativity.
- Art is a London-centric market which means visual artists who choose to locate in the capital experience high costs of living in order to access local opportunities, whilst regionally based visual artists face the challenge of competing for a more limited number of local opportunities.

The sections below focus on the new evidence that this study has generated and identifies a range of benchmark findings derived from the evidence.

5.1.2 New evidence

5.1.2.1 Incomes and diversity

The study has generated a range of quantitative and qualitative evidence regarding the livelihoods of visual artists in England in 2015/16. Amongst this evidence, two important themes stand out: as confirmed above, that incomes for visual artists are comparatively low (and that the proportion of income that comes from arts practice is also low); and that the visual artists' workforce has a demographic profile which suggests challenges around diversity (i.e. specifically in relation to gender, the disabled and ethnic minorities). It may be useful in the future to test whether there is a causal relationship between these two themes and for future surveys to monitor these trends.

5.1.2.2 Commitment to arts practice and balancing a portfolio career

On the whole, visual artists are committed to their art practice and this provides the key motivator in their development of practice. As previous studies have found, incomes from art practice are, however, insufficient for the vast majority of visual artists to support themselves and portfolio careers are common.

However a key finding of this study is that despite the challenges of developing an artistic career and the incomes that are associated with such a career, only 6% of visual artists indicate that they are unsure whether they will continue their artistic practice in 2017.

5.1.2.3 Key benchmark findings for the visual arts sector in 2016

The breadth of data collected during the 2016 survey provides a benchmark for assessing the livelihoods of visual artists in the UK.

Here we present a list of current issues and considerations which form this benchmark, with more detail and a greater range of data available in the accompanying data report:

1. Visual artists are primarily motivated by artistic fulfilment followed by personal well-being and financial remuneration, in that order.

2. The key challenges faced by visual artists are a lack of financial return from their art coupled with a lack of time to spend on their artistic practice. Visual artists also identify the costs of running their art practice (which vary considerably by artform) and a lack of work opportunities as being important barriers to career fulfilment. Earning a sustainable living from art is highly challenging for the majority of visual artists. Low art incomes necessitate that the majority of visual artists to either draw on other financial resources and income sources in order to ensure they can pursue their art.

3. The visual artists' workforce displays a number of diversity challenges, e.g., there are more women as a proportion of all visual artists (71%) than in the England workforce as a whole (47%). Whilst there is no significant difference in the proportions of men and women at different career stages, the data show women spend less time on their practice, and earn less on average – in total and from art – than men do.

4. The visual artists' workforce is also less diverse in terms of the disabled (8% cf. 13%[xiv]) and those aged less than 49 (57% cf. 70%[xv]) it is also less ethnically diverse than the wider workforce (6% of visual artists being from a BME background, cf. 10%[xvi]).

5. BAME artists do perceive discrimination as a barrier. In fact, 24% of BAME artists identified discrimination on the basis of ethnic background as a barrier (compared to less than 1% of non-BAME respondents) and 4% stated this as their top barrier.

6. A third (33%) of disabled artists stated that difficult access is a barrier, and 16% identify discrimination on the basis of disability as being a barrier. These barriers surrounding disability are statistically significant for artists with disabilities which are physical, mental or learning related. Whilst these two factors rank below the barriers of finance, time and local opportunities discrimination could be a limiting factor to the longevity and success of disabled artists' careers.

7. In terms of developing their careers, visual artists consider there to be a number of key factors. The most important are: the opportunity to exhibit, perform or publish at a critical time in their career, support from family/friends/peers and the artistic talent. This is not the sole reference to the support of peers and networks. These are seen as crucial for visual artists in terms of experience and knowledge sharing, learning new techniques, information signposting and accelerating artistic development.

8. Visual artists and opportunities for visual artists are concentrated in London though each region is home to a considerable number of visual artists. The survey results confirm that London artists are most likely to access opportunities locally and have the highest overall income by location. Those outside of London perceive that opportunities are more limited, as is (often) their mobility and therefore their ability to access opportunities further afield. The research indicates that whilst some important differences can be discerned between London artists and others, these differences are limited.

9. There is an important relationship between the visual artists' workforce and other sectors including creative industries. An analysis of additional jobs demonstrates that many visual artists find additional work in art-related fields and apply their skills to add value in a range of sectors and workplace environments. This should be seen as a positive outcome arising from the necessity that most visual artists face in terms of generating income to supplement that which their artistic practice provides.
10. Employing the proxy for socio-economic group used in this study (whether artists' parents have university degrees or not) we found that those whose parents are degree-educated earn a higher income than other artists (£16,235 compared to £15,750). Further, significantly more visual artists with degree-educated parents had undertaken unpaid work experience (9% of this group) compared to the second group (5%) and all visual artists (6%).

5.2 Areas for further analysis and research

This study has achieved much in terms of gathering up to date insight in response to the key research questions. Whilst there are limits to the detail that it has generated on some topics, it has generated a significant evidence base, it has created important data resources and it represents a jumping off point for future research work. Areas where further research could be carried out include:

- Exploring the livelihoods of disabled visual artists or those with long term health/mental health/learning difficulties. Surveys and focus groups are rather unsympathetic methods of gathering important data from such groups. This requires future, dedicated resource and a specialist steering group to facilitate data collection that can be used to chart the contribution and sustainability of arts practice in this group.
- Further research into the apparent significant gender imbalance in the sector (e.g. the majority of the surveyed population being women and the majority of the higher earning visual artists being men) is required.
- Further mining of the survey dataset that this project has generated. Whilst the reporting process has explored this resource extensively, it is such a large dataset that it will support further analysis. For example, advanced statistical analysis focused on specific groups of visual artists (to be determined, but could include those based in particular regions, those in particular career stages or those in particular age groups) to identify key characteristics and how they differ from one group to the next.
- In depth research into the relationship between visual artists and other creative industries to investigate the impact that visual artists have on this sector, how the relationships are made and how they work, and areas of untapped potential.
- Additional research – perhaps in the form of a long-term tracking study – looking at visual artists 'life cycles' to understand geographic movement of visual artists in more detail and relating this to different visual artists' demographics and characteristics, what drives key career decisions and the link to livelihoods.
- In line with the comment above, a longitudinal study should consider also investigating the number and demographics of those accessing and completing visual arts higher education over time, in order to understand trends and investigate return on investment in education.
- An investigation into the levels and sources of debt taken on by visual artists and the relationship between debt and other demographics (e.g. career stage, age, educational level and so on).
- Whilst additional jobs are crucial, visual artists call on financial support and income from a range of other sources to support their livelihoods (e.g. partner's income, personal savings, support from family or friends, tax credits and state benefits). This topic of artists hidden or unofficial 'subsidy'

appears worthy of further research to quantify it and investigate the key mechanisms by which it occurs.

- Further investigation of visual artists' location decisions and the extent to which they are driven by the desire to be located near to art market opportunities, peer networks, support organisations or any other 'pull' factors. This could be extended to cover more insight into those factors that may force visual artists to leave a specific location ('push' factors).

The study has achieved the creation of a detailed baseline. It has provided a vital snapshot of the working lives of visual artists but it strongly shows a sector with a number of real challenges and a situation that needs monitoring. It also has the potential to represent the first step in a process of developing a more refined, detailed and longitudinal evidence base regarding the livelihoods of visual artists in England. Considering the demographic findings there appears to be an important opportunity to follow the changes in demographic, education and earning potential of the community in order to anticipate changing support needs.

Project partners

End Notes

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[i] TBR Analysis of ONS Annual Population Data 2014-2015. Within 'Livelihoods of Visual Artists: Literature and Data Review', TBR, a-n and James Doeser 2016

[ii] See a-n (2014) Paying Artists Research: Phase 1 Findings. http://www.payingartists.org.uk/wp-content/uploads/2015/04/Paying-Artists-Research-Phase-1-Findings.pdf and a-n (2016). Paying Artists: How we got here: Culmination of paying artists consultations 2014-2016. http://www.payingartists.org.uk/wp-content/uploads/2016/07/How-We-Got-Here-Culmination-of-Paying-Artists-Consultation-Process-2014-16.pdf

[iii] Throsby, D. and Zednik, A. (2010). Do you really expect to get paid? An economic study of professional artists in Australia. Australia Council for the Arts. http://australiacouncil.gov.au/workspace/uploads/files/research/do_you_really_expect_to_get_pa-54325a3748d81.pdf.

[iv] Abbing, H. (2002). Why are artists poor? The exceptional economy of the arts. Amsterdam University Press.

[v] a-n (2011). The Big Artists Survey Results. https://www.a-n.co.uk/wp-content/uploads/2011/10/1601469.pdf

[vi] Throsby, op cit

[vii] a-n (2013) Paying Artists Research Phase 1 findings and ONS (2016) Mid-Year Population Estimates 2015. Note percentages are rounded so may not sum to 100

[viii] Galloway, S., Lindley, R., Davies, R and Scheibl, F. (2002). A balancing act: artists' labour markets and the tax and benefits system. Report for Arts Council England.

[ix] Musicians Union (2012) The Working Musician

[x] ONS (2015) Annual Survey of Hours and Earnings: 2015 Provisional Results

[xi] ONS Annual Population Survey (July 2014 - June 2015) & the Papworth Trust (2016) Disability in the United Kingdom: Facts and Figures

[xii] E.g. N Liena, C Friestadb, K-I Kleppa (2001), Adolescents' proxy reports of parents' socioeconomic status: How valid are they? J Epidemiol Community Health 2001;55:731-737 doi:10.1136/jech.55.10.731,

and, Aarø LE1, Flisher AJ, Kaaya S, Onya H, Namisi FS, Wubs A.(2008) Parental education as an indicator of socioeconomic status: improving quality of data by requiring consistency across measurement occasions, Scand J Public Health. 2009 Jun;37 Suppl 2:16-27

[xiii] Except for North East, and East Midlands, where sample sizes were too low to robustly measure significance

[xiv] ONS Annual Population Survey (July 2014 - June 2015) & the Papworth Trust (2016) Disability in the United Kingdom: Facts and Figures

[xv] ONS Annual Population Survey (July 2014 - June 2015)

[xvi] ONS Annual Population Survey (July 2014 - June 2015)