Livelihoods of Visual Artists: Literature and Data Review

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Livelihoods of Visual Artists: Literature and Data Review

Prepared by TBR's Creative & Cultural Team, a-n The Artists Information Company and James Doeser

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- 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

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Executive summary

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 aims to address 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 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 sub-art forms within the visual arts and their relationship with the Creative Industries.

This document presents the findings of a review of existing literature and data undertaken as the first stage of this study. This review draws on a range of sources including: previous sector reports and survey findings from policy makers, funders and sector bodies; academic literature; books; journal articles; and trade press. While the focus of this review was on England, we have identified and included relevant literature from across the UK and some from elsewhere in the world where lessons can be learned (in particular the US, Australia and Northern Europe).

The purpose of this document is to present a summary of the existing evidence related to the key research aims above and to identify the key implications for further stages of the Livelihoods of Visual Artists study.

Two important tasks were undertaken in order to provide a firm basis for the study and important context for the wider analysis. Firstly, in order to inform the research it assesses available data on the size and characteristics of the visual arts population. This includes defining and articulating the scope of the visual arts sector and which activities and artists to include in the research. Secondly, it presents a review of available literature in order to identify what is known and what is not known in relation to the four research aims identified listed above.

The size and nature of the visual artist workforce

- There is no one-size-fits-all definition of visual artists or the term ‘artist’. The term ‘artist’ has been variably defined in the literature sources consulted. In many cases, the definition of an ‘artist’ is often based on self-definition or a value judgement. Analysis of secondary data, such as the Annual Population Survey (APS) from the Office of National Statistics (ONS), shows that arts industries and occupations tend not to easily fit standard industrial classifications (SIC) or standard occupational classifications (SOC).
- Available estimates of the diversity of visual artists indicate that artists tend to be older than the average workforce. Women are well-represented: APS data shows an equal split between male and female artists while some surveys have found a higher proportion of women. The proportion of artists from a BAME background is lower than in the general population. Disabled artists are also under-represented compared to the general population.
- If these statistics are truly representative of the equality, diversity and reach within the visual arts in the UK, they suggest that more could perhaps be done to attract a more diverse range of people

into visual arts. However, the small sample of artists from which the APS statistics are drawn, means that they may not be representative of the overall artist population. The other sources reviewed give support to some estimates, but also raise questions, such as the true representation of women amongst artists (which varies considerably between sources).

- There is currently little evidence on additional demographic factors in the visual arts workforce. More research is needed to understand the wider demographics of the sector beyond gender, age, disability and ethnicity (such as social background, learning difficulties, and caring responsibilities) and whether these demographics influence individuals' career path and success.

Research aim 1 - Challenges and barriers faced by artists

- Existing evidence suggests that barriers to artists becoming established or achieving success include: lack of work opportunities; lack of financial return; lack of time to spend on art due to other jobs or responsibilities; and the cost of materials and equipment.
- The main barriers to developing and continuing a career as an artist are financial: low payments for work, expectation to work without pay and the cost of materials and studio space all contribute to artists earning less in comparison to other similarly qualified careers. Previous surveys of artists undertaken by policy makers, funders or sector bodies have found that artists' earnings from their art are low: a-n and AIR's Big Artists Survey found that the average annual turnover artists made from their practice was around £9,000. However, evidence suggests that 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 may deter some from entering or continuing a career as an artist.

Research aim 2 - Social, cultural and environmental factors

- Existing research indicates that income is low for art practice and the nature of work can be unstable and sporadic. It also identifies these factors as important drivers behind many artists supplementing their income with other jobs.
- Evidence suggests that the most important factors to advance a career in the visuals arts include: hard work/persistence; self-motivation; the artist's talent; encouragement; critical timing; and training. Reasons artists might not pursue a career in the visual arts include: higher/steadier pay in other fields; artistic work opportunities not available; change in interests; debt; and lack of networks.
- Previous research has highlighted the importance of business skills in assisting artists to pursue successful careers, such as skills and understanding related to finance, tax and marketing. There is some evidence that universities are recognising the importance of such skills and increasingly seeking to ensure that degrees do equip art graduates with these skills. It will however take time for these skills to permeate the workforce and it is important that practicing artists are able to access suitable Continuing Professional Development (CPD). Existing research suggests that key gaps in artists' skills, which CPD could support, include business skills, understanding and exploiting intellectual property rights (IPR), greater media literacy and increased knowledge of the structure of creative careers.
- It is clear that a number of factors can pose challenges to artists in beginning, continuing and progressing their career. Whilst there has been some discussion of how such factors may disproportionately affect certain groups, this was found to be lacking in existing literature.

Research aim 3 - Geography of artists

- The distribution of artists around England is not uniform. London has historically dominated with the North West, South East and South West also being home to relatively large numbers of artists. Whilst the evidence found pays some attention to different challenges and issues in different regions (such as studio rent prices) there is little in-depth insight into these differences, nor on how mobile artists need to be to access markets and opportunities.

Research aim 4 - Variation between sub-art forms and relationships with other sectors

- The literature reviewed tends to treat the term 'artists' rather broadly, often not specifying visual artists, and not considering sub-art forms within the visual arts. Thus we have found no evidence discussing variations between sub-art forms.
- The research from around the world into artists in developed economies shows that multiple job-holding is the norm for artists.
- In terms of work relationships with Creative Industries, these do exist. Many visual artists supplement their income with arts-related jobs in museums and galleries, which can assist in career development through building a professional network and gaining insight and experience in the art world. However, the evidence predominantly assesses the need for artists to take second-jobs and how many of these are in the wider Creative Industries, rather than exploring commercial links and economic spillovers.

Concluding comments

- This literature and data review is extensive and broad. However as the preceding discussion shows, the existing evidence does not comprehensively address the research aims. The need to have better and more specific data to answer the questions posed by the research aims demonstrates the need for the Artists Livelihoods survey which has been delivered as the primary data collection element of this study, supplemented by focus groups with artists.
- Therefore, one key aim of the primary data collection element of this study is to help fill gaps in the existing evidence base, primarily seeking to investigate:
    - 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?
    - What evidence is there that work relationships between visual artists and the wider Creative Industries exist and what form do these take?

1. Introduction

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 main goal of the overall study is to identify the challenges and barriers faced by visual artists that prevent them from realising their full potential and how these issues vary across different groups. This study aims to provide insight and benefit policy makers, funders, and stakeholders in the visual arts sector, and ultimately artists themselves.

1.1 This report

This report provides a summary of the first stage of the research; a review of existing literature and data to inform the study and subsequent primary research. There are two objectives of this literature and data review. Firstly, in order to inform the research it assesses available data on the size and characteristics of the visual arts population. This includes defining and articulating the scope of the visual arts sector and which activities and artists to include in the research. Secondly, it presents a review of available literature in order to identify what is known and what is not known in relation to the four research aims which are:

1. To understand the challenges and barriers faced by visual artists that prevents 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 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 sub-art forms within the visual arts, and the relationship between visual artists with the wider Creative Industries.

This review draws on a range of sources including: previous sector reports and survey findings from policy makers, funders and sector bodies; academic literature; books; journal articles; and trade press. While the focus of this review is on England, we have identified and included relevant literature from across the UK and indeed elsewhere in the world where lessons can be learned (in particular the US, Australia and Northern Europe). In terms of the criteria of material reviewed, the initial focus was on relatively recent literature which presented well researched findings on the livelihoods of visual artists, primarily with a UK focus. Where there were gaps in the evidence, the scope of the review was broadened to identify older material and international examples to provide further information and insight.

1.1.1 Report structure

The next section (Section 2) summarises the review of the definition of visual artists and data available on the size and characteristics of the visual arts population.

The subsequent sections discuss each of the research aims in turn:

- Section 3: Research aim 1 - challenges and barriers faced by visual artists.
- Section 4: Research aim 2 - social, cultural and environmental factors.
- Section 5: Research aim 3 - location and movement of artists.
- Section 6: Research aim 4 - sub-art form and visual artist relationships with the Creative Industries.

Each section includes, at its end, some ‘concluding comments’, identifying key findings as well as implications for the primary stages of this research.

2. Defining and counting visual artists

2.1 Definitions used in literature and data

While not a key research aim, it was first necessary to review what a visual artist is considered to be. Various definitions of visual artist appear in literature; this review has focused on those useful to inform the primary stages of this research.

Arts Council England (ACE) defines the visual arts as *'a dynamic art form that seeks constantly to reinvent itself. It embraces a broad range of media, such as painting or moving image work, but it is notable also for blurring boundaries and for collaborating with other social practices and creative disciplines*[1]. As a working definition for this research project, ACE describes the visual artist as an individual practicing the following art forms: animation; architecture; landscape art; crafts; design; environmental art; fine art; graphic/illustration; live art; moving image; new media; photography; public art; and other visual art.

The research and evidence reviewed contains multiple definitions. For example, Murray considers 'contemporary visual arts' as an *'umbrella term for a broad range of artistic practices including live and performance art, media art, sound art, painting, sculpture, printmaking, photography, craft and object design, and installation art*[2]. Markusen et al take an alternative approach: they do not define visual artists based on an art form classification but rather define an artist as anyone who self-defines as an artist, spends at least ten hours per week on their artwork, and shares their work beyond family and close friends[3].

From these few citations, it is recognised that definitions of visual art and/or the visual artist in the literature are wide-ranging and not necessarily consistent across sources. It is also apparent from consultation with sector stakeholders and through reviewing the literature that the definition of an artist is often based on self-definition or a value judgement[4].

The data review undertaken as part of this exercise involves analysing secondary data in order to assess the scale of visual artists in England. This approach involves the use of official, national data sources, which are updated regularly, and will allow comparisons with the wider economy and other sectors. This necessitates use of the collective term 'workforce' since the data refers to the number of people operating in a particular occupation, such as visual artists. A drawback of this secondary analysis of official data is that we are restricted by the structures of those data sources, and the standardised classifications used within them. Arts industries and occupations tend not to easily fit standard classifications.

The Annual Population Survey (APS), managed by the Office of National Statistics (ONS) is the key national dataset which focuses on labour market size and characteristics. The key framework for classifying individuals by the work they undertake is called the Standard Occupational Classification (SOC) system and this is employed within the APS. According to the SOC system, an artist is someone who 'creates artistic works using appropriate techniques, materials and media; designs artwork and illustrations; and restores damaged pieces of art'[5]. This is the definition of people who are captured by the SOC code 3411, which has been used throughout this review as the basis of national estimates of the size of the visual artists' workforce. It is not possible to disaggregate this SOC code further to focus only on visual artists and this is a key challenge in researching the size and characteristics of the visual artists' workforce.

Further information on ONS definition of artists can be found in the appendix (see page 30).

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[1] http://www.artscouncil.org.uk/what-we-do/supporting-artforms/visual-arts/.
[2] Murray, P. (2014). Talking Points: A snapshot of contemporary visual arts 2013-14. Australia Council for the Arts. http://www.australiacouncil.gov.au/workspace/uploads/files/research/au2000_talkingpoints_final_13_-543256d38f5f6.pdf.
[3] Markusen, A., Gilmore, S., Johnson, A., Levi, T. and Martinez, A. (2006). Crossover: How Artists Build Careers across Commercial, Nonprofit and Community Work. Minneapolis: Hubert Humphrey Institute of Public Affairs, University of Minnesota.
[4] Oakley, K. (2009). Art Works: Cultural Labour Markets – a literature review. London: Creativity, Culture and Education. http://www.creativitycultureeducation.org/wp-content/uploads/CCE-lit-review-8-a5-web-130.pdf.
[5] http://www.neighbourhood.statistics.gov.uk/HTMLDocs/dev3/data/SingleClass.html?soc=3411

2.2 Employment headlines

APS data estimates that 43,400 individuals work as artists (SOC 3411) in England as their main job. Furthermore, the APS estimates that there are an additional 8,200 individuals working as artists as a second job.

Membership and insight data from a-n, a sector support body for artists, estimates that more than 37,000 people work in the UK visual arts sector[6]. The APS estimate is higher than this, however the definition used by the APS is wider, covering all artists not solely visual artists.

2.3 Workforce characteristics

In this section we investigate existing data related to workforce characteristics, specifically; age, BAME, gender and disability. APS data allows examination of the characteristics of artists and is the main source of this data. However, this again is limited by the issue of defining artists and by small sample sizes when investigating at a more granular level.

Table 1 indicates that the age profile of artists is older than the general workforce of the UK. This data echoes sector research which has also found that artists tend to be older than the average workforce, with few artists under 35[7]. a-n's 2015 membership survey identified that more than half of working visual artists are aged 50 or over[8]. Scottish Artists Union's 2015 membership survey found that 80% of respondents are over 40 years old; however, 28% described themselves as early career stage and 46% as mid-career[9] (although there is some debate about the use of these labels, discussed below).

Table 1: Age Profile of Artists

Age band	Artists	Total workforce
16-19yrs	0%	3%
20-34yrs	18%	32%
35-49yrs	34%	35%
50-64yrs	37%	26%
65 plus	11%	4%

Source: Annual Population Survey July 2014 - June 2015

The APS data indicates that, 7% of artists are from a BAME background[10], which is less than the overall England population. This figure is further supported by a-n's Paying Artists Research Phase 1 Findings, which suggests that the significant majority of visual artists are white: only 5.9% of their survey sample identified themselves as non-white[11].

Women are well represented in the arts workforce, with APS estimates indicating an equal split between male and female artists[12], closely reflecting the split in the general adult population (49% males, 51%

[6] 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.
[7] 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.
[8] a-n membership survey 2015. Unpublished.
[9] Scottish Artists Union (2015) Membership Survey 2015. Scottish Artists Union (2015) Membership Survey 2015. http://www.sau.org.uk/news/doc/sau-membership-survey-report-2105-.pdf.
[10] Annual Population Survey July 2014 - June 2015
[11] 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.
[12] Annual Population Survey July 2014 - June 2015

females in 2015[13]). The Creative and Cultural Skills footprint indicated a higher proportion of women with a gender ratio of 46:54 male:female compared with 54:46 in the wider workforce[14]. However, a-n's Paying Artists Research suggested that there is a much higher proportion of female artists (70.9%)[15].

APS estimates indicate that overall 5% of the artist workforce has a disability[16] compared to around 19% of the national working age population. Similarly, a-n's Paying Artists Research Phase 1 findings indicate that 4.3% of visual artists are disabled, compared to 92.3% non-disabled (3.4% did not disclose). However, an examination of a-n's membership in 2015 reveals that 14.7% of members consider themselves to be disabled or to have a long-term health condition[17], although the nature of the artists' disability is not stated.

2.3.1 Education

Using the APS definition of artists based on SOC Codes, artists appear to be more highly qualified than the general population, with 80% of artists qualified to degree (NVQ 4) level compared with 36% for the general population of UK[18].

This higher attainment of qualification by artists and creative workers has changed little since 2003, where over half of those employed in cultural occupations (including artists) report having attained qualifications at equivalent to NVQ level 4 or higher compared with about a quarter of those employed in non-cultural occupations[19].

2.3.2 Career stages of artists

There are contrasting views in the literature about whether artists' careers can be segmented in stages, and whether they differ from conventional career trajectories. Whilst some literature does suggest that they will often follow, or aim to follow a progression of sorts, from entry stage, to becoming established as a practising artist, to later stages[20], it does seem that artists' careers are more likely to be non-linear in nature.

Throsby and Zednik offer a broad schema for understanding the career stages of artists: *'The earliest stage is that of starting out, setting the foot on the first rung of the ladder, looking for the first breakthrough. There follows a period in which the artist consolidates these early efforts and works hard to achieve a level of professional acceptance – this phase can be described as 'emerging' or 'becoming established'. The central stage of a fulfilled professional artistic career is one of established practice. This does not necessarily entail full-time or continuous work but certainly connotes a degree of commitment and a level of achievement to warrant the description of the artist as an established practising professional. For some artists this stage gives way to one where the commitment remains but the work is less intensive than at the height of the artist's career.*'[21]

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[13] ONS (2016). Annual population survey, year ending December 2015

[14] TBR / Creative and Cultural Skills (2013) Visual Arts Footprint http://ccskills.org.uk/supporters/advice-research/article/the-creative-and-cultural-industries-visual-arts-2012-13.

[15] 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.

[16] Disability Discrimination Act or work limiting

[17] a-n (2014). Artists Membership Survey, DHA

[18] Nomis (2015). Labour Market Profile – Great Britain / UK. Source: The Office of National Statistics. https://www.nomisweb.co.uk/reports/lmp/gor/2092957698/report.aspx.

[19] Davies, R. and Lindley, L. (2003). Artists in figures. Report for Arts Council England. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/artists-in-figures

[20] 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.

[21] 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.

This schema may work for artists more generally, but it is difficult to reconcile this with the evidence of non-linear nature of many careers in the visual arts. Surveys of artists undertaken by a-n indicate that around half of artists consider themselves to be emerging, whilst only 14% consider they have reached the stage of being established (Table 2). These findings are largely substantiated by the Big Artists Survey. However, an alternative source (Own Art Evaluation) suggested that in 2008, the artists' workforce was split fairly evenly between early career (36%), mid-career (31%) and established stages (33%). The primary research explores this further.

Table 2: Artists' self-defined stage of practice

	Paying Artists Survey 2013 (n=1,061)	Big Artists Survey 2011 (n=1,222)	Own Art Evaluation 2008 (n= 204)
Student	3.4%	N/A	N/A
Emerging/early career	45%	53%	36%
Mid-career	37%	32%	31%
Established	14%	15%	33%

Sources: a-n (2014). Paying Artists Research Phase 1 Findings; AIR & a-n (2011). Big Artists Survey. Creative Research (2008). Own Art: Evaluation on the impact of the Own Art scheme on artists since its launch in 2004. Note percentages are rounded so may not sum to 100

2.4 Section conclusion

Estimating the population of the visual arts sector in the UK is problematic and it is a challenge to give a definitive estimate, with official statistics likely underestimating the number of artists in the UK. Similarly, there is a lack of secondary data to analyse the characteristics of artists at a more granular level, such as by region or demographics. This has implications for any research study or survey, as it is not possible to compare the profile of a survey sample against a definitive profile of the population of the artists as a whole. This is especially the case when looking at demographic data at a more granular level where national data sample sizes are very small, and often suppressed.

As well as challenges surrounding the availability of official data, limitations to using existing data also include rigid, out of date or inconsistent sector definitions which may not align with the visual arts sector in England today. This makes it difficult to robustly assess the characteristics of visual artists in the UK. However, secondary data can provide some indication of the representation of key characteristics, which, when compared to the wider workforce, can inform understanding of the composition of artists' workforce. Available estimates of the diversity of visual artists indicate that artists tend to be older than the average workforce. Women are better represented than compared to the workforce as a whole: ONS data shows an equal split between male and female artists while other surveys have found a higher proportion of women. The proportion of artists from a BAME background is lower than in the general population. Disabled artists are under-represented compared to the general population.

However, the small sample of artists from which the APS statistics are drawn, means that these estimates may not be representative of the overall artist population. The other sources reviewed give support to some estimates, but also raise questions, such as the true representation of women amongst artists (which varies considerably between sources). A larger survey could give some strength to existing estimates of these characteristics within the visual arts workforce, and further research could investigate any reasons behind under-representation of protected characteristics.

There is currently little evidence on additional demographic factors in the visual arts workforce. There is a need for further research to establish the key demographics of the sector, plus additional characteristics beyond gender, age, disability and ethnicity (such as social background, learning difficulties, and caring responsibilities) and whether these demographics influence individuals' career path and success.

It is apparent from consultation with sector stakeholders and through reviewing the literature that the definition of an artist is often based on self-definition or a value judgement. The primary stage of this research, therefore, was designed to ensure artists are offered the opportunity to self-report and provide their own definition of their arts practice when surveyed. Such an approach allows the views of hard-to-reach artists to be captured as some individuals who consider themselves to be visual artists may not recognise or accept some of the standard definitions.

3. Economic challenges and barriers faced by visual artists

There is evidence that artists' careers tend to be precarious, unstable and poorly paid. In this section we focus on the various key challenges and barriers to developing and continuing a career which are related to the nature of the career.

Artists are also challenged by many other factors, including social, cultural and environmental. These are considered in section 4.

3.1 Incomes and livelihoods of visual artists

Table 3 displays data related to incomes of arts occupations as reported to the Annual Population Survey (APS). However, the sample of artists on which these estimates are based is small and unlikely to be representative of visual artists as an overall workforce and therefore these results should be considered indicative only.

Table 3: Arts Occupations by Income Band

	£9,999 or below	£10,000 to 19,999	£20,000 - £28,999	£29,000 - £40,999	£41,000 or above	Sample Size
% Artists	*	10%	30%	*	35%	16

Source: Annual Population Survey July 2014 - June 2015. * indicates that data is suppressed due to small sample numbers.

Surveys of artists conducted by sector support bodies or arts organisations in the UK and Ireland provide additional insight into the earning power of artists. For example, the largest most recent survey of artists' incomes, a-n's Paying Artists Research Phase 1 findings (2014), revealed that the average annual turnover artists make from their practice is around £10,000[22].

When sources from other nations are considered, it is clear that this picture is reflected in other locations. For example:

- A study of Irish artists by Visual Artists Ireland found that 67% earn less than €10,000 from their creative work. Further, 33% earn less than €10,000 from all their sources of income[23].
- The Scottish Artists' Union 2012 membership survey found that, after tax, 72% of artists earned less than £5,000 from their practice. In 2015, 64% of members earned less than £5,000. Just 2% earned over £20,000[24].

The distribution of income in the arts is unequal[25]: for a minority of artists, incomes can be exceptionally high (the high earners in the arts earn more than the high earners in many other professions). However, it is clear from previous surveys that the majority of visual artists earn little. Kretschmer et al's analysis found that the top 7% of artists earn 40% of the total income, while the other 93% earn 60% of the income between them[26]. In addition, visual artists are frequently expected to produce work without any payment[27]. This picture remains largely unchanged from 2002, when previous research commissioned by

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[22] 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.
[23] Visual Artists Ireland (2009). The survey of the social, economic and fiscal status of the visual artist in Ireland. http://visualartists.ie/advocacy-advice-membership-services/advocacy/advocacy-datasheet-1-topic-the-status-of-the-artist-in-ireland/the-social/.
[24] Scottish Artists Union (2015). Membership Survey 2015. http://www.sau.org.uk/news/doc/sau-membership-survey-report-2105-.pdf.
[25] Kretschmer, Singh, Bently & Cooper (2011). Copyright contracts and earnings of visual creators. CIPPM, Bournemouth University
[26] ibid
[27] a-n/AIR (2014). Securing a future for visual arts in the UK.http://www.payingartists.org.uk/wp-content/uploads/2014/05/Paying-Artists_Securing-a-future-for-visual-arts-in-the-UK_f.pdf.

ACE showed that gaining access to the artists' labour market is considered challenging and that unpaid, voluntary work is a common experience for artists[28].

ACE and CEBR's 2013 economic impact report showed that whilst full-time earnings in the arts have risen by 6.8% in the previous five years, part-time earnings (in which one might expect to see freelancers and artists included) have decreased by 5.3%[29]. Furthermore, the Creative & Cultural Skills Footprint 2012/13 estimated that individuals working within the visual arts in the UK earn on average £7.36 per hour, compared to £8.42 across the wider creative and cultural industries[30].

Visual artists tend to be self-employed, operating a portfolio or project-based career, characterised by multiple short-term contracts. To supplement the unstable payments associated with their practice, many artists hold additional jobs, both related to art and not[31]. The Creative & Cultural Skills Footprint 2012/13 estimated that across the UK 77% of visual artists are self-employed compared to 43% of all Creative Industries and just 14% of the UK economy. As a comparison, in Australia, around 90% of visual artists and craft practitioners are freelance or self-employed, and 78% of the Scottish Artists Union's membership of 1,300 professional artists and makers are self-employed compared with 12.2% of the Scottish economy.

This means that as a workforce group, visual artists share a tendency of sporadic unpredictable incomes. There is limited evidence on artists' financial planning, security, any steps taken towards financial stability, and how the nature of their art livelihood affects them.

Artists' financial insecurity is a theme that runs through a-n's 2011 Big Artists' Survey[32]. This source revealed that only 16% of artists were paying into a pension to support them in old age and retirement. Previous research into arts livelihoods by ACE noted that job uncertainty and job insecurity are features of artists' employment especially the prevalence of seasonal employment, unsocial hours of work, and unpredictable hours of work[33]. ACE commissioned research into financial planning and pensions among artists found that overall, almost 70% did not have a pension[34]. Lack of a pension was highest amongst the 31-40 age group, and surprisingly high for over 60s (at 43%).

Table 4: Percentage of artists with a pension

Has existing pension	30 or under	31 - 40	41 - 50	51 - 60	60 or over	Total
No	66.7%	85.2%	68.3%	60.0%	42.9%	68.1%
Yes	33.3%	14.8%	31.7%	40.0%	57.1%	31.9%

Source: ACE 2012

Research from around the world into artists in developed economies shows that multiple job-holding is the norm for artists. The main reason for this is that income from artistic practice is insufficient to live on[35].

[28] 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.
http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems

[29] Centre for Economics and Business Research (2013). The contribution of the arts and culture to the national economy. London: Arts Council England. http://www.artscouncil.org.uk/media/uploads/pdf/CEBR_economic_report_web_version_0513.pdf.

[30] TBR / Creative and Cultural Skills (2013). Visual Arts Footprint. http://ccskills.org.uk/supporters/advice-research/article/the-creative-and-cultural-industries-visual-arts-2012-13.

[31] McCarthy et al (2005). A Portrait of the Visual Arts: Meeting the challenges of a new era. RAND Research in the Arts.

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

[33] 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.
http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems

[34] ACE (2012). Pensions for Artists – A review of artists' pensions requirements

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

Research indicated that almost half (48%) of artists' income comes from non-art-related work[36]. Abbing calls this kind of income 'self-subsidy'.

Previous research commissioned by ACE reported that this non-art related work tends to be unskilled and taken on as a necessary income supplement[37]. However, artists view some forms of non-arts work positively. Many jobs, while not directly art-related, are within the wider Creative Industries. Non-art work provides opportunities for them to apply their skills in alternative ways[38].

Temporary contracts also allow artists to work for different organisations and retain control over their work. However, further understanding is needed of the non-art jobs which artists perform to make a living, what sectors these non-art jobs are in, how much time artists spend in these non-art jobs, how much income artists make from these jobs, and whether their artistic skills and experience are utilised fully in these jobs. Further data collected during the primary research can help build our understanding of these factors.

3.1.1 Expenses

Artists incur expenses in practising their art, due to the requirement for materials, equipment, workspace, and travel, and the fees they have to pay in order to submit their work for exhibitions. The costs associated with the materials and equipment required in visual arts can be substantial[39].

'In the early career stages the costs of training can be significant, in the form of fees and income forgone. Once established, artists have to incur a wide range of expenses essential to their art, including the purchase of materials and equipment, rent of studio or work space, freight and travel, further training, and commissions to agents or galleries'[40].

While a survey of artists for Artquest[41] in 2009 found that 68% of artists spend less than £5,000 per annum on their work, a quarter spends between £5,000-10,000 and 7% spend more than £10,000. The biggest expenses are materials and equipment, which are vital for artists to do their work but can be costly. a-n's 2011 Big Artists' Survey found that 31% of artists paid for work space, with monthly costs varying between £25 and £1,400 per month[42]. Even in 2002, artists reported the need for affordable and shared facilities and workspace[43]. In addition, 2004 research suggested that the provision of affordable workspaces is insufficient for the number of artists practising[44]. As suggested, work space and other expenses can vary. The extent to which these vary between sub-art forms is explored in the primary research.

Furthermore, a-n's Paying Artists Research Phase 1 findings show that of those artists for whom delivery and transportation expenses are necessary to exhibit their work, 60% have to cover these expenses

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[36] Clare Antrobus Consulting / ArtQuest (2009). The funding and finance needs of artists. London: Artquest. http://www.artquest.org.uk/articles/view/funding-and-finance-needs-of-artists.
[37] 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. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems
[38] 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.
[39] Ibid
[40] Throsby, D. and Zednik, A. (2011). Multiple job-holding and artistic careers: some empirical evidence. *Cultural Trends,* volume 20 (1): 9-24.
[41] Clare Antrobus Consulting / ArtQuest (2009). The funding and finance needs of artists. London: Artquest. http://www.artquest.org.uk/articles/view/funding-and-finance-needs-of-artists.
[42] AIR & a-n (2011). The Big Artists Survey Results. https://www.a-n.co.uk/wp-content/uploads/2011/10/1601469.pdf.
[43] 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. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems
[44] Jeffreys (2004). An overview of research undertaken or commissioned by Arts Council England on the needs of the individual artist

themselves[45]. There are other costs artists incur associated with exhibiting, including fees for residencies and fees charged to submit funding applications[46].

3.2 Market challenges

The nature and condition of the market that buys the outputs of visual artists' practice will influence significantly the nature of artists' livelihoods. Abbing[47] outlines a variety of possible explanations for why artists can find it difficult to navigate a marketplace that he considers to pay little respect to the values of artists themselves. He describes the arts market as an archetypal 'winner-takes-all' market in which a very small number of artists do very well, with a significant difference in remuneration between those who do well and those who do not. It has been suggested that it is because of this 'winner-takes-all' market that *'many artists work outside the conventions of the gallery system and eschew the art market'*[48]. Some commentators have claimed that public policy, rather than addressing market failure, can in fact reinforce the status quo of the market and exacerbate the problems associated with it.

Commissions for galleries, particularly those viewed as high status, are key to artists' visibility and career success. It has been claimed by Ravetz and Wright (2015) that art produced outside of galleries can be viewed as lower status and sometimes is referred to as 'community art'[49]. a-n's Paying Artists Research Phase 1 findings indicate that exhibitions are considered to be among the most important activities for artists' practice[50]. Exhibitions are important because they enable artists to raise the profile of their work, and share their work with the public and potential buyers. Other research by a-n shows that while commission opportunities that command larger budgets and offer scope for research and development are welcomed by artists (as part of their contribution to income in a portfolio career), the average commission budget had declined by four fifths from £100,000 in 2007 to £19,444 in 2013[51].

Artists are frequently expected to exhibit without pay. a-n and AIR report that 63% of artists have had to turn down requests from galleries to exhibit their work because they cannot afford to do so without pay[52]. Research by a-n found that 95% of participants (artists and curators) believed that artists should be paid a fee for exhibiting in publicly-funded galleries, and drew a link between artists being appropriately paid and future diversity in the artist workforce[53]. Exhibition payment guidance published by a-n in 2016 has since set out a framework establishing benchmark payments for artists, in particular, the need for transparency around artist payments, negotiation and written contracts.

Open exhibitions are an example of a challenge to artists' pursuit of paying opportunities, whereby artists submit their work (and are often charged to do so) to a panel of experts who select the applicants to participate in an exhibition. A high profile example is the Royal Academy Summer Show, which attracts around 10,000 artists' applications, each artist paying a submission fee of £25 to apply for a place in the final show where their work is displayed and on sale.

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[45] 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.
[46] a-n News (2015). Open exhibitions and entry fees: price worth paying or license to exploit artists? https://www.a-n.co.uk/news/open-exhibitions-and-entry-fees-price-worth-paying-or-licence-to-exploit-artists.
[47] Abbing, H. (2002). Why are artists poor? The exceptional economy of the arts. Amsterdam University Press.
[48] Ibid.
[49] Ravetz, A. and Wright, L. (2015). Validation beyond the gallery. Manchester: Report for Axisweb. http://www.axisweb.org/features/news-and-views/beyond-the-gallery/validation-beyond-the-gallery/.
[50] 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.
[51] a-n (2013). Artists work in 2013 https://www.a-n.co.uk/resource/artists-work-in-2013.
[52] a-n / AIR (2014). Securing a future for visual arts in the UK. http://www.payingartists.org.uk/wp-content/uploads/2014/05/Paying-Artists_Securing-a-future-for-visual-arts-in-the-UK_f.pdf.
[53] 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

The cost of exhibiting at events can mean artists risk paying more in fees than they earn if they don't make enough sales[54]. There is some debate over the practice of charging artists to apply for a place in an exhibition, and whether this contributes to sustainable careers[55]. Despite the costs and no guarantee of sales, exhibiting is important for artists' livelihoods. At exhibitions artists have the opportunity to make direct sales and potentially win prizes. More importantly, exhibitions help artists develop their careers in the long-term since exhibitions play a crucial role in raising the artist's critical profile which may lead to sales and other opportunities in the future. The evidence reviewed does not provide data on the scale and extent of the longer-term and indirect impacts that exhibitions have on artists' careers. This is an area which will be explored further in the research survey and focus groups.

In this context, research in the UK involved two years of consultation with the arts sector on the topic of exhibition payments, resulting in the publication of a-n's Paying Artists Exhibition Payment Guidance in October 2016 which established baseline best practice for sectoral implementation. Findings from the precursor consultations included:

- "Overall, there was a strong desire and willingness across the sector (95%+ support from both artists and curators/gallery representatives) to ensure that artists are paid a fee for exhibiting in publicly-funded galleries, but that some flexibility in the practical application of this approach was likely to be required."
- "Almost all participants believed that it should either be the norm or always the case that artists receive a fee for exhibiting in publicly-funded galleries."[56]

Artists' residencies are worth less than 2% of the value of all opportunities recorded by a-n in 2013, and whilst the average income from a residency in 2007 stood at £4,860, by 2013 it had reduced to £2,946[57]. The result is that the degree of off-site preparation and pre-planning required of an artist is often not reflected in the project brief, time allocation or the fee level.

Educational and council employment opportunities for artists enable artists to be active and impactful in local and diverse communities with attendant social and cultural benefit to those communities. As public funding to local authorities for both educational and cultural activities is likely to be further stretched in coming years, some sources of income to visual artists could be at risk. At around 10%, the value of all work for artists from local authorities had been steady since 2010 but fell in 2013 to 3%[58].

3.3 The benefits system

Unemployment and in-work benefits are an important additional source of income for artists, due to the low levels of income they receive for their practice[59]. However, research conducted in Australia indicated that the ability to access benefits or to continue artistic activity while receiving benefits varies[60]. Throsby and Zednik's research indicated that '*Fewer than half of all artists who experienced unemployment have applied for unemployment benefits. Of these, 40% experienced difficulty accessing unemployment benefits because of their creative occupation; the problem arose because their artistic skills were not recognised or valued or because they were expected to undertake inappropriate work or work that was not related to their artistic skills'* [61].

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[54] University of Sheffield (2016) Art: Independence and Interdependence: A snapshot of the visual arts scene in Sheffield
[55] a-n (2015). Open exhibitions and entry fees: price worth paying or licence to exploit artists? https://www.a-n.co.uk/news/open-exhibitions-and-entry-fees-price-worth-paying-or-licence-to-exploit-artists.
[56] a-n and AIR; The Paying Artists Campaign (2016). How we got here: Culmination of Paying Artists Consultations 2014-2016
[57] a-n (2015). Open exhibitions and entry fees: price worth paying or licence to exploit artists? https://www.a-n.co.uk/news/open-exhibitions-and-entry-fees-price-worth-paying-or-licence-to-exploit-artists.
[58] *Ibid.*
[59] Abbing, H. (2002). Why are artists poor? The exceptional economy of the arts. Amsterdam University Press.
[60] 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.
[61] *Ibid.*

Similarly, the UK benefit system has in the past not been considered to be well placed to respond to the intermittent working patterns of artists[62]. This echoed an international research project commissioned by ACE in 2002, which suggested that creative and artistic work is not valued in the public policy arena and that the key features of artists' working lives sit uncomfortably with tax and social security systems that have been designed with more conventional and regular employee or self-employed status in mind[63]. The same report noted that *'the necessity for artists to devote long periods of unpaid time to artistic research and their own personal development often means that they are not recognised as 'job-less', even though they are income-less'*[64]. There is a lack of further existing evidence on the role and importance of benefits in artists' careers, so this is explored further in the primary research.

3.4 Section conclusion

The main barriers to developing and continuing a career as an artist are financial: low payments for work, expectation to work without pay and the cost of materials and studio space all contribute to artists earning less in comparison to other similarly qualified careers. The existing evidence suggests that, both in the existing economic climate and in the longer term, visual artists face significant economic challenges, which may deter some from entering or continuing a career as an artist.

Existing research has identified that barriers to artists continuing a successful career include lack of work opportunities, lack of financial return, lack of time to spend on art due to other jobs or family responsibilities, and the cost of materials, equipment and studio space. There could be more understanding of who is most affected by these barriers, and more detailed understanding of expense costs.

The primary research stage of this research provides an opportunity to explore how artists' incomes are composed in 2016, including: the different art-related sources of income artists earn through, how much income is derived from each, and other forms of income they rely on to supplement their art practice such as additional jobs, benefits, savings, support from family or spouse and any other means that artists use to make ends meet.

Research from around the world into artists in developed economies shows that multiple job-holding is the norm for artists. Further understanding is needed of the non-art jobs which artists perform to make a living, what sectors these non-art jobs are in, how much time artists spend in these non-art jobs, how much income artists make from these jobs, and whether their artistic skills and experience are utilised fully in these jobs.

The primary research stage of this study will also explore whether financial challenges prevent artists from fulfilling their potential, for example by understanding whether the need for additional jobs means artists spend less time on their practice than they would like.

[62] Jeffreys (2004). An overview of research undertaken or commissioned by Arts Council England on the needs of the individual artist
[63] McAndrew, Claire (2002). Artists, taxes and benefits – an international review. Report for Arts Council England. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/artists-taxes-and-benefits-an-international-review
[64] *Ibid.*

4. Social, cultural and environmental factors

In this section, we consider literature and data which contributes to understanding of how social, cultural and environmental factors such as employment status, education, age and gender affect the career and talent development of visual artists.

4.1 Career entry and progression

Early career artists in particular experience low pay and frequently have to take on unpaid as well as low paid projects when entering the workforce[65]. As such, it is important to understand what drives artists to overcome these challenges, what enables them to do so, and what barriers make this difficult.

Australian research indicates that hard work, persistence and passion are the most important factors identified by artists for furthering a visual artist's career, shown in Table 5.

Table 5: Most important factor in advancing career identified by Australian artists

	At present time	Throughout career
Hard work or persistence	29%	24%
Passion, self-motivation	27%	26%
Artist's talent	11%	14%
Support and encouragement	13%	13%
Critical timing	9%	7%
Training	8%	13%
Other factors	4%	2%

Source: Throsby & Zednik 2010

Survey results from Australia suggests that for nearly half of artists, it is their first major commission, exhibition or publication that they perceive to be their moment at which they become established, and that recognition from the industry and public are also important to feeling established.

In America, Alper and Wassall studied around 50 years' of data from the US census and were able to identify a number of characteristics of the artist workforce. Familiar observations like low pay, low levels of employment, and high levels of education were seen in the US, as have been observed in other countries. As well as providing further evidence of characteristics identified elsewhere, this study contributed to the understanding of the level of churn in the artists population with people becoming artists and pausing (or ending) their artistic careers earlier than observed in other professions[66].

Building on this point, American research considers reasons for not continuing a career as an artist[67]. The results are set out in Table 6 and these indicate that higher or more stable pay in other work and a lack of artistic work opportunities are the most frequent barriers to continuing a career as an artist identified by artists.

[65] Arts Council England (2014). The value of arts and culture to people and society
[66] Alper, N., and Wassall, G. (2006). Artists Careers and Their Labour Markets in Ginsburgh, V. and Throsby, D, (eds) Handbook of the Economics of Art and Culture, volume 1. pp 813-864.
[67] Strategic National Arts Alumni Project (2014). Making it work: The education and employment of recent arts graduates. Annual Report 2014.

Table 6: Reasons for not progressing career as an artist identified by American artists

	Recent	Non-recent
Higher/steadier pay in other fields	49%	59%
Artistic work not available	56%	56%
Change in interests	27%	29%
Debt	39%	22%
Lack of access to networks	30%	22%
Family related issues	10%	23%
Current location not conducive	22%	16%
Lack of social support	8%	9%

Source: SNAAP Annual Report 2014

Throsby and Zednik's Australian research also finds a lack of artistic work opportunities and poor financial reward to be important barriers to career continuation, but that the most important factor is lack of time to spend on practice due to other responsibilities (Table 7). When asked about how much time they would like to spend doing artistic work, about two thirds of visual artists and craft practitioners said they would like to spend more of their time than they currently do. Two thirds of those visual artists and craft practitioners said they would like to spend 100% of their time on such work[68].

Table 7: Factors preventing progress as an artist identified by Australian artists

	At present time	Throughout career
Lack of time to do creative work due to other responsibilities	28	23
Lack of work opportunities	26	25
Lack of financial return from creative practice	21	29
Personal issues	8	8
Lack of access to funding or other financial support	7	6
Difficulties accessing markets and materials	6	5
Other factors	4	3

Source: Throsby & Zednik 2010

According to Throsby and Zednik's survey, the factors which prevent artists from spending as much time as they wished doing what they wanted to do are (in order of frequency) 'insufficient income from artistic work', 'work not available' and 'domestic responsibilities or childcare'[69].

Surveys of artists suggest that there is no single route to a successful career for artists[70]. Adaptability and diversification may be important factors for forging a career, especially for those working outside of galleries.

4.2 Development of necessary skills

The nature of the visual arts sector, featuring many freelancers and contract type work, prevents easy access to training provision[71]; it is often difficult for artists to find timely and affordable professional

[68] Throsby & Zednik (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.
[69] *Ibid.*
[70] Ravetz, A. and Wright, L. (2015). Validation beyond the gallery. Manchester: Report for Axisweb. http://www.axisweb.org/features/news-and-views/beyond-the-gallery/validation-beyond-the-gallery/.
[71] Jeffreys (2004). An overview of research undertaken or commissioned by Arts Council England on the needs of the individual artist.http://www.artscouncil.org.uk/media/uploads/an_overview.pdf.

development opportunities[72]. Self-employed artists find it difficult to take time off to participate in training due to the potential loss of income as well as the costs of training. In addition, individuals whose work is variable cannot always commit to the time requirements of a long-term course[73]. A 2009 survey undertaken by Artquest found that 37% of its members spent no money on Continuous Professional Development (CPD) and training and 33% planned to spend nothing in the next year[74].

Research commissioned by Creative and Cultural Skills in 2009 also identifies the difficulty of accessing training and development for artists, due to their propensity to work as sole-traders or in small businesses[75]. They recommend that visual arts organisations work with local authorities and education institutions to assist artists in accessing training and development.

A previous study by ACE from 2002 noted that *'self-employment and freelance project-based work leaves little opportunity for professional development. Low income and, for some, unsociable hours or work and variable locations of work, precluded investment in expensive training and restricted the scope of commitment to courses requiring regular attendance'*[76].

Research suggests that a key gap in artists' skills (which CPD support could address) is business skills, such as financial and tax understanding, and marketing or promotion of work. As the Creative and Cultural Skills research indicates, *'Business-focused training is not always built in to visual arts education, leaving practitioners and workers less able to manage their careers effectively'*[77]. Artquest's 2009 survey additionally identified that 75% of its members were not confident in their understanding of funding and finance issues[78]. As already noted, the majority of visual artists are self-employed, and so are effectively running their own business. Gunnell and Bright suggested that would-be creatives would value '*help with marketing and the bureaucracy of self-employment, and mentoring in how to sell themselves*'[79].

4.2.1 Higher Education

Oakley highlights an expansion in arts and design higher education over the 20 years prior to her review in 2009, citing 156,000 students studying arts and design at the time of her writing, an increase of more than 60 per cent in a decade. Oakley considers this increase in Higher Education students to be responsible for the over-supply of labour into the cultural sector[80]. Analysis of 2015 Higher Education Statistics Agency (HESA) data shows that there were 97,485 students studying visual arts based subjects in 2013/14. Of these, 91% of students studied full-time, 87% were undergraduates and 11% were postgraduates[81]. There is little understanding, however, of the relationship between the increase in arts graduates and the arts workforce.

Skills agencies have raised concerns that art degrees do not provide the full range of skills needed to pursue a successful and sustainable career as a freelancing artist: *'Employers don't always understand visual arts*

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[72] Creative and Cultural Skills (2009) *op cit*
[73] Jeffreys (2004). An overview of research undertaken or commissioned by Arts Council England on the needs of the individual artist.
[74] Clare Antrobus Consulting / ArtQuest (2009). The funding and finance needs of artists. London: Artquest. http://www.artquest.org.uk/articles/view/funding-and-finance-needs-of-artists.
[75] Creative and Cultural Skills (2009) The Visual Arts Blueprint: A workforce development plan for the visual arts in the UK. http://creative-blueprint.co.uk/library/item/the-visual-arts-blueprint-a-workforce-development-plan-for-visual-arts-in-the-UK.
[76] 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.
http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems
[77] Creative and Cultural Skills (2009). *op cit*
[78] Clare Antrobus Consulting / ArtQuest (2009). The funding and finance needs of artists. London: Artquest. http://www.artquest.org.uk/articles/view/funding-and-finance-needs-of-artists.
[79] Gunnell, B. and Bright, M. (2010). Creative survival in hard times. Report for Arts Council England. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/creative-survival-hard-times
[80] Oakley, K. (2009). Art Works: Cultural Labour Markets – a literature review. London: Creativity, Culture and Education. http://www.creativitycultureeducation.org/wp-content/uploads/CCE-lit-review-8-a5-web-130.pdf
[81] Higher Education Statistics Agency (2015) Students in Higher Education Providers 2013/14.

qualifications and what they can offer, and there appears to be some mismatch between those qualifications and the skills employers need[82]. A review of art degree courses found many are responding to this by increasingly including components related to business and employment, alongside artistic practice, indicating that some universities are aiming to equip students with valuable skills to succeed in the art marketplace[83].

Throsby and Zednik's Australian research emphasised the importance of business and career management skills for artists: '*If students aspiring to become professional practitioners in any art form are likely, whether by choice or necessity, to be adopting a portfolio approach to their career, they will require specific training in career management as an essential part of their curriculum.*[84]''

There is potentially a mismatch, in the UK and elsewhere, between numbers of emerging graduates and 'directly related' job opportunities, suggesting that it is important for arts students to understand that their degrees and their skills from creative practice-based learning can be transferred to other employment settings and work sectors. The recent introduction of increased tuition fees in the UK may lead to a decline in the high proportion of degrees currently held by the artists' workforce, with early analysis of the impact on UCAS acceptances finding a fall of 8% in the creative arts and design subject area in 2012/13, having previously been steadily increasing since 2006[85]. The increased cost of a degree may no longer appear to be a good investment. Low earning graduates could be disadvantaged as they will take longer to pay back the loans thereby incurring more interest. However, it is also possible that as the earnings threshold for paying back student loans increases that the lowest earning graduates may pay less back if their income level does not reach the threshold[86]. There is little further evidence yet of how recent changes to student fees impact on university applications for creative arts and design subjects specifically. Across all university subjects, recent studies have suggested students fees have influenced the choices young people make. For example, research by the National Education Opportunities Network (Neon), which estimates that if tuition fees were reduced to £6,000 then 45% of young people they surveyed would choose a different course and nearly 60% would work less during term time[87]. To better understand this issue in the context of artists' livelihoods, the primary research survey and focus groups will explore how important higher education is to artists' careers, and how the sector views access to further and higher education courses.

However, there is some emerging evidence from the US to suggest that training undertaken at university level is preparing artists for their future careers. Research undertaken by the Strategic National Arts Alumni Project (SNAAP) indicated that '*many [arts] graduates*[88] *find work in the discipline of their training. On average, six of every ten currently employed arts graduates described their current jobs as "relevant" or "very relevant" to their training (specifically, 64% of recent alumni and 69% of all alumni)—a greater percentage than graduates from journalism, accounting, or biology majors*'[89].

While art degrees are valuable, though not necessary, for a career in the arts, a degree leaves graduates with substantial levels of student debt. Equally, however, higher qualifications could lead to higher earning

[82] Creative and Cultural Skills (2009). The Visual Arts Blueprint: A workforce development plan for the visual arts in the UK. http://creative-blueprint.co.uk/library/item/the-visual-arts-blueprint-a-workforce-development-plan-for-visual-arts-in-the-UK.
[83] A-n (2013). The lay of the land: current approaches to professional practice in visual and applied arts BA courses. https://www.a-n.co.uk/news/life-after-art-school.
[84] Throsby, D. and Zednik, A. (2011). Multiple job-holding and artistic careers: some empirical evidence. *Cultural Trends,* volume 20 (1): 9-24.
[85] HEFCE (2013). Higher Education in England; Impact of the 2012 reforms
[86] Banks, M. & Oakley, K. (2016). The dance goes on forever? Art schools, class and Higher Education. *International Journal of Cultural Policy,* vol 22(1):41-57
[87] National Education Opportunities Network (2015). Does Cost Matter? Students'understanding of the higher education finance system and how cost affects their decisions.
[88] Arts generally, not visual arts specifcally
[89] Strategic National Arts Alumni Project (2014). Making it work: The education and employment of recent arts graduates. Annual Report 2014.

opportunities in additional, non-practice, jobs, with evidence showing that those with degrees earn more than those without, despite the increase in supply of graduates[90].

4.3 How challenges are experienced differently by different groups

The various challenges and barriers to sustaining a career as an artist are not experienced equally by all artists. This section reviews the limited research which considers the ways in which some artists experience challenges differently.

4.3.1 Education

Research published in 2011 found an interesting relationship between artists' level of education and their income from self-employed artistic activity. Kretschmer et al found that median incomes for their sample of artists were highest amongst those qualified to A Level standard and lowest for those with a Bachelor's degree, rising a little for those with a Masters or PhD. This varied between the sub-forms examined, with even greater difference apparent for fine artists[91]. It is noted though that the sample sizes for this research are small and the results may mask other interactions and factors which influence incomes, suggesting that further research is necessary.

4.3.2 Disabled artists

Economic barriers to participation can be felt more acutely by disabled people because of the increased likelihood of disabled people living in a low income household compared to non-disabled people[92].

In her evaluation of the Outside IN project initiated by DASH to increase the number of disabled and deaf artists working in mainstream galleries, Saint (2011) reports on a lack of data on the number of disabled and deaf artists having exhibited in galleries[93]. Given the lack of data, the primary research aims to explore this issue to start to fill the data gap.

4.3.3 Challenges faced by older artists

As life expectancy increases, notions of retirement are changing. While many who have had salaried jobs and private pensions are able to retire and comfortably, the situation is different for freelance workers, many of whom have no pension (almost 70% according to ACE research discussed earlier) and are less likely to own their home[94]. As a result, many artists continue practicing beyond retirement age. Some artists in fact continue to develop and in old age may adopt new techniques or styles and produce innovative new work[95].

Despite the artist workforce having an age profile which is older than average, there appears to be less support available for older artists, in comparison to the focus placed on early career artists establishing themselves. Murray reports that in Australia, the arts sector prioritises and over-invests in the young and emerging demographic, and there is lack of support and attention for mid-career artists:

'Strong feedback from the sector was that Australia prioritises and potentially over-invests in the "young and emerging" demographic. While participants agreed that support is important for this category, many cautioned that the focus should be on new ideas, not new generations. The mid-career artist was thought to be currently under-supported in Australia and one of the clearest messages emanating from the sector

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[90] Institute for Fiscal Studies (2016). The UK wage premium puzzle: how did a large increase in university graduates leave the education premium unchanged https://www.ifs.org.uk/publications/8322
[91] Kretschmer, Singh, Bently & Cooper (2011). Copyright contracts and earnings of visual creators. CIPPM, Bournemouth University.
[92] Consilium (2014). Equality and diversity within the arts and cultural sector in England: Evidence and literature review final report. Manchester: Arts Council England
[93] Saint (2011). Outside IN – Final Evaluation Report 2011. DASH
[94] Jones, S. (2015). Long live creative living. *Arts Professional. http://www.artsprofessional.co.uk/magazine/288/case-study/long-live-creative-living*
[95] Freundlich, A. & Shively, J. (2006). Creativity and the exceptional aging artist. *Clinical interventions in aging,* volume 1(2): 197-200

is that they require and deserve more support. Participants regretted that some of Australia's most highly regarded artists are not able to continue to properly develop their careers. This was also seen as lost capacity for Australia'[96]*.* This issue has also been raised anecdotally by artists in the UK, although there appears to be little codified evidence.

4.3.4 Gender and family

Gender and age seem to make little difference to whether or not artists apply their artistic skills or work outside the arts. However, the support of a spouse's or partner's income can be somewhat more important for female artists than for men[97]. Previous research commissioned by ACE reported that artists' careers *are 'underpinned by the employment situation of a partner; artists [speak] of household decisions whereby one partner [has] taken more predictable employment so as to guard against the uncertain earning of the partner involved in artistic work'*[98]*.*

The variable and unpredictable nature of working as a freelance artist can impact on artists wanting to combine their work with family life[99]. The lack of regular, guaranteed pay from their art practice may drive them to take up additional paid work, or to leave art in pursuit of a more stable income. For example, a report on women in creative media found that women are better represented in sectors featuring large employers with stable employment. The same report suggested that occupations which tend to be freelance experience high drainage of female talent, as combining the unpredictable contracts and uncertain hours of a freelance career with raising a family is difficult[100].

Research by Galloway et al indicated that creative or artistic work is considered *'high risk for individuals with dependants…women who were responsible for child care experienced this sharply as did single parents (who were almost always women)'*[101]*.*

The barriers women and mothers face in being able to participate and fulfil their potential in the UK labour market as a whole have been much documented over many years. Recent research from the Institute of Fiscal Studies (IFS) reports that *'a big difference in employment rates between men and women opens up upon arrival of the first child and is highly persistent'* and that *'for women who leave paid work, hourly wages for those who subsequently return are, on average, about 2% lower for each year that they have taken out of employment in the interim'*[102].

Although such detailed evidence has not been identified in relation to the visual arts, anecdotally the sector is aware of the challenges facing carers and parents, especially women and/or single artists. The barriers faced by these groups are explored in more detail in the primary research.

4.3.5 Artists' background

The low and sporadic financial returns discussed earlier, coupled with the challenges of breaking into the professional art world, mean that beginning a career as an artist can be challenging. The prevalence of unpaid or low paid work on entering the profession can effectively exclude those who don't have other

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[96] Murray, P. (2014). Talking Points: A snapshot of contemporary visual arts 2013-14. Australia Council for the Arts. http://www.australiacouncil.gov.au/workspace/uploads/files/research/au2000_talkingpoints_final_13_-543256d38f5f6.pdf.
[97] Throsby & Zednik (2010). Do you really expect to get paid?
[98] 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.
http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems
[99] The women and work partnership project (2016). Women's voices, women and work, Scotland 2016: Challenges experienced by women working in music and the performing arts sectors
[100] Creative Skillset (2010) Women in the creative media industries.
[101] Galloway, S., Lindley, R., Davies, R and Scheibl, F. (2002). *Op cit*
[102] Institute of Fiscal Studies (2016). The Gender Wage Gap, IFS Briefing Note BN186

financial support behind them[103]. The rising costs of gaining an art degree in comparison to the previous provision of free Higher Education and grants for attending art school, could contribute further to the disadvantaging of some aspiring artists. With little further evidence available, the primary research looks into the experiences of artists from different backgrounds to identify whether motivations, challenges and barriers differ.

4.4 Section conclusion

It is clear that a number of factors can impact on artists in beginning, continuing and progressing their career. Evidence suggests that the most important factors to advance a career in the visuals arts include: hard work/persistence; self-motivation; the artist's talent; encouragement; critical timing; and training. Reasons artists might not pursue a career in the visual arts include: higher/steadier pay in other fields; artistic work opportunities not available; change in interests; debt; and lack of networks. The nature of the artist's career leads to other challenges, such as fitting in practice alongside other, paid, work, difficulties accessing training, and lack of long term financial stability.

Existing evidence shows that the visual arts workforce is highly qualified, but that art degrees do not always provide the full range of skills needed to pursue a successful and sustainable career as a freelancing artist. Previous research has highlighted the importance of business skills in assisting artists to pursue successful careers, such as skills in marketing and promotion, accessing funding and understanding of intellectual property rights.

There is limited evidence regarding how graduates and other new artists enter the profession, and how social, cultural and environmental factors are experienced by artists at this or other career stages.

Whilst there has been some discussion of how such factors may disproportionately affect certain demographic groups, evidence of this was found to be lacking in existing literature. The survey stage of this research provides an opportunity to identify differences between different demographic groups in terms of incomes, motivations, barriers and fulfillment. The survey will also help to understand what artists feel is required to become established as an artist, and whether this varies between different groups.

[103] O'Brien, D. & Oakley, K. (2015). Cultural value and inequality: A critical literature review. A report commissioned by the Arts and Humanities Research Council's Cultural Value Project

5. Location and movement of artists

This section reviews available data to understand where artists are located and reviews literature to identify factors which affect the movement and retention of artists between the regions, London and internationally.

5.1 Location of artists

With no census of visual artists, estimates of their geographical distribution around the country are drawn from previous surveys. Data from three comprehensive secondary sources are reproduced in Table 8. This indicates that a significant proportion of visual artists are based in London, a higher proportion than the general workforce.

Table 8: Location of UK artists

Region where UK artists are based	Paying Artists survey 2013 (n=1,061)	Big Artists Survey 2011 (n=1,191)	ONS Mid-Year Population Estimates 2015
East Midlands	6%	6%	7%
East of England	6%	5%	9%
London	20%	17%	14%
North East	6%	6%	4%
North West	11%	10%	11%
South East	14%	16%	13%
South West	13%	14%	8%
West Midlands	7%	7%	9%
Yorkshire & Humberside	7%	7%	8%
Northern Ireland	1%	1%	3%
Scotland	5%	6%	8%
Wales	5%	5%	5%

Source: 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

Communities of artists are considered to play a valuable role in stimulating economic development in local areas, often contributing to regeneration of rundown areas and increased tourism[104].

GLA commissioned a survey in 2014 to examine the provision of affordable studio space for artists in London. The resulting report estimated that more than 11,500 artists are using studio spaces across the city. More than half of these artists rent their space, and security of tenure was found to be an issue with 3,220 artists thought to be in premises 'at risk'[105].

Difficulty finding available and affordable studio space is not just confined to the capital. Our scoping discussions with the sector Steering Group revealed that this is becoming an increasingly important issue in cities around England, such as Manchester and Bristol. Similarly, recent research in Sheffield identified that more than 360 artists use studio space in the city, with more on waiting lists[106]. The waiting list indicates that demand for studio space is not being met, which could lead to rises in rents in future years.

There has been a rise in so called 'guardian accommodation', where low income, often creative individuals utilise an empty building to work and/or live for no or low rent, which brings the benefit of providing security and maintenance an otherwise empty building would not have. An example of use of an empty

[104] Jeffreys (2004). An overview of research undertaken or commissioned by Arts Council England on the needs of the individual artist
[105] Greater London Authority (2014). Artists' Workspace Study: Report and Recommendations.
[106] University of Sheffield (2016). Art: Independence and Interdependence: A snapshot of the visual arts scene in Sheffield

building for work space is Commercial Union House in central Newcastle, previously a disused space, which now houses several galleries, creative organisations and studio / workspace. However, such spaces tend not to last permanently, since property owners and developers will at some point want property returned, leaving artists without a work or exhibition space[107].

Scottish Artists Union's 2015 survey of members found that 57% of members are urban based and 45% rural based artists[108]. In Australia, although on average artists tend to live in urban centres (69% compared to 31% in rural settings), visual artists tend to be split nearly 50/50 between urban and rural locations. This might correspond with type of practice, with some forms requiring less of a reliance on physical infrastructure to support their practice.

5.2 Movement of artists

Concern has been expressed in the media that the traditional concentration of artists in London is changing[109]. While London continues to be a draw for creatives, artists, as low paid workers, tend toward areas of low rent for accommodation and studios, and are priced out when development and gentrification occurs. However, there is currently little evidence to suggest there is a decrease in the numbers of artists in London – when artists leave the capital it is likely that others move in to replace them given the opportunities London holds. For example, the geographical breakdown of a-n's membership has remained consistent over a number of years. What may be changing is the demographics of artists, the rate of churn, the challenges faced and the balance of time spent on art practice and additional jobs.

For some regional artists, their local area lacks sufficient selling opportunities and art buyers, making it difficult to earn from their art without travelling or selling work elsewhere[110]. The markets, incomes, challenges, and barriers across the regions of England are studied in the primary research.

5.3 Section conclusion

The distribution of artists around England is not uniform. Producing evidence to estimate the distribution of artists is a priority for the survey stage of this research, and will subsequently inform sampling for additional qualitative research.

London has historically dominated with the North West, South East and South West also being home to relatively large numbers of artists. The high cost of living and practicing art in London is assumed to be having an effect on artists, causing concern amongst artists that living in London will become unsustainable; however there is so far little robust evidence to support this. A large scale survey may identify any emerging regional hotspots for artists, and if repeated over time could observe any trends in movement to or from the capital.

Whilst the evidence found pays some attention to different challenges and issues in different regions (such as studio rent prices) there is little in-depth insight into these differences, nor on how mobile artists need to be to access markets and opportunities. This will be explored further in our primary research.

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[107] Artquest (2015). System failure: Six conversations to reboot the art world http://www.artquest.org.uk/articles/view/system_failure

[108] Scottish Artists Union (2015). SAU Membership Survey 2015. http://www.sau.org.uk/news/doc/sau-membership-survey-report-2105-.pdf

[109] Lewis, J. (2016). 'Hackney, I lost you': the London creatives priced out of their studios. *The Guardian,* 28 January 2016. https://www.theguardian.com/cities/2016/jan/28/hackney-creatives-priced-out-london-studios-artists-gentrification. Clark, N. & Neve, R. (2014). Mayor to investigate as artists fear being driven out of London by rising costs of studio space. *The Independent.* 10 February 2014. http://www.independent.co.uk/arts-entertainment/art/news/artists-driven-out-of-london-by-rising-costs-and-shortage-of-studio-space-says-report-9120150.html

[110] University of Sheffield (2016). Art: Independence and Interdependence: A snapshot of the visual arts scene in Sheffield

6. Sub-art form variations and their relationship with Creative Industries

This section reports on evidence relating to the variation between different sub-art forms within the visual arts and their relationship with the wider Creative Industries.

6.1 Variations between sub-art forms

The literature reviewed treats the term 'artists' rather broadly, often not specifying visual artists, and not considering sub-art forms within the visual arts. Thus this review has found limited evidence discussing variations between sub-art forms; this will be a focus in the primary data collection, analysis and reporting.

6.2 Visual artist relationships with Creative Industries

There are a number of ways in which relationships between visual artists and the wider Creative Industries might occur. These include[111]:

- Knowledge exchange – new ideas which benefit other firms/artists without rewarding the artists creating them;
- Product exchange - new products (or IP) which are used to benefit other firms/artists without rewarding the artists producing them; and
- Network exchange - benefits which firms/artists can only obtain by grouping together.

Examples of how a knowledge or product exchange might occur would be through second jobs, which many visual artists need to take in order to make ends meet. In undertaking this second job, which may be within the Creative Industries or not, they will naturally take with them and potentially employ their creative and artistic skills and these might lead to the adaptation of knowledge within the business that employs them in designing and/or improving new products or services. Such exchanges might also occur when visual artists are commissioned to produce work which may then stimulate the commissioning body to develop and adapt its services or products in ways that may not have occurred otherwise.

Network exchange may occur where there are agglomerations, clusters or communities of artists that are co-located. They may or may not work together but there is a potential for two types of agglomeration exchange. The first is that a place may become attractive to other people or firms (e.g. other artists or other creative firms) because they value easy access to the artists in that place. The second is that the 'brand' of that place changes because the concentration of artists alters its image (and this may influence firms, workers and tourists).

The review has sought evidence related to each of these types of exchange. However, the bulk of the evidence relates to second and other jobs taken by visual artists in order to make ends meet. Other types of exchange have to some extent been examined across the Creative Industries[112] but not at the level of visual artists per se.

The research around the world into artists in developed economies shows that multiple job-holding is the norm for artists. The main reason for this is that income from artistic practice is insufficient to live on[113], leading artists to 'move among sectors to cobble together arts income'[114]. Abbing calls this kind of income 'self-subsidy'.

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[111] Adapted from Frontier Economics (2007). Creative Industry spillovers – understanding their impact on the wider economy, DCMS
[112] See for example evidence cited on the Cultural Creative Spillovers website (and in particular the Evidence Library page at https://ccspillovers.wikispaces.com/What+are+spillover+effects%3F)
[113] Abbing, H. (2002). Why are artists poor? The exceptional economy of the arts. Amsterdam University Press.
[114] Markusen, A., Gilmore, S., Johnson, A., Levi, T. and Martinez, A. (2006). Crossover: How Artists Build Careers across Commercial, Nonprofit and Community Work. Minneapolis: Hubert Humphrey Institute of Public Affairs, University of Minnesota.

Throsby and Zednik suggest that artists generally divide their time between three types of work[115]:

- Arts practice;
- Arts related work – using artistic skills in art-related work other than their practice for example teaching art;
- Non-arts work – includes low skilled work, also includes jobs utilising artistic skills within wider Creative Industries, for example advertising.

Research indicated that almost half (48%) of artists' income comes from non-art-related work[116]. Previous research commissioned by ACE reported that this non-art related work tends to be unskilled and taken on as a necessary income supplement[117]. However, artists view some forms of non-arts work positively. Many jobs, while not directly art-related are within the wider Creative Industries. Non-art work provides opportunities for them to apply their skills in alternative ways[118].

Temporary contracts also allow artists to work for different organisations and retain control over their work. However, further understanding is needed of the non-art jobs which artists perform to make a living, what sectors these non-art jobs are in, how much time artists spend in these non-art jobs, how much income artists make from these jobs, and whether their artistic skills and experience are utilised fully in these jobs.

Many visual artists supplement their income with arts-related jobs in museums and galleries, which can assist in career development through building a professional network and gaining insight and experience in the art world[119]. However, more generally it appears that a 'second job' or complementary employment is seen as essential to survival for most artists[120].

Some second jobs capitalise on artists' professional knowledge and skills and links can be made with prime artistic activity (such as work in museums or galleries). However, in October 2013 the Museums Association[121] announced that while 47% of museums and galleries surveyed had seen an increase in volunteers, 37% had reported staff cuts. As cuts continue, many arts organisations are offsetting the loss of paid staff (such as gallery invigilators) with increased use of unpaid volunteers[122].

6.3 Section Summary

There is a lack of existing evidence on the variations between sub-artforms. This will be explored further in the analysis of our primary survey data.

To supplement the low, unstable payments associated with their practice, many artists hold additional jobs, both related to art and not. For some these are a necessary evil which detracts from the time and creativity they have available for their practice, while others appreciate the opportunity to use or develop their skills in alternative ways. Relationships with the Creative Industries do exist, however, the evidence

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[115] Throsby, D. & Zednik, A. (2011). Multiple job-holding and artistic careers: some empirical evidence. *Cultural Trends,* volume 20(1):9-24

[116] Clare Antrobus Consulting/ArtQuest (2009). The funding and finance needs of artists. London: Artquest. http://www.artquest.org.uk/articles/view/funding-and-finance-needs-of-artists.

[117] 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. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems

[118] 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.

[119] a-n (2014). Cost of volunteering: will UK arts ecology pay the price? https://www.a-n.co.uk/news/the-cost-of-volunteering-will-uk-arts-ecology-pay-the-price.

[120] 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. http://webarchive.nationalarchives.gov.uk/20160204101926/http:/www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/a-balancing-act-artists-labour-markets-and-the-tax-and-benefit-systems

[121] Museums Association (2013). Cuts Survey 2013 http://www.museumsassociation.org/download?id=1019920.

[122] Ibid

predominantly assesses the need for artists to take second-jobs and how many of these are in the wider Creative Industries rather than exploring commercial links and economic spillovers. Further understanding is needed of the non-art jobs which artists perform to make a living, what sectors these non-art jobs are in, how much time artists spend in these non-art jobs, how much income artists make from these jobs, and whether their artistic skills and experience are utilised fully in these jobs.

7. Conclusion

Reviewing the range of literature and data relating to the four research aims has enabled identification of existing knowledge and evidence gaps. In each area, some evidence was found but also significant gaps were identified, which have subsequently informed the design of the primary research stages of the Livelihoods of Visual Artists project.

Available estimates of the diversity of visual artists indicate that artists tend to be older than the average workforce. Women are well-represented: ONS data shows an equal split between male and female artists while some surveys have found a higher proportion of women. The proportion of artists from a BAME background is lower than in the general population. Disabled artists are under-represented compared to the general population.

However, the small sample of artists from which the APS statistics are drawn means that they may not be representative of the overall artist population. Further, the definition used is too broad (artists vs. visual artists alone). The other sources reviewed give support to some estimates, but also raise questions such as the true representation of women amongst visual artists (which varies considerably between sources). A larger survey could give some strength to existing estimates of these characteristics within the visual artist workforce, and further research could investigate any reasons behind under-representation of protected characteristics.

There is currently little evidence on additional demographic factors in the visual artist workforce. More research is needed to understand the wider demographics of the sector beyond gender, age, disability and ethnicity (such as social background, learning difficulties, and caring responsibilities) and whether these demographics influence individuals' career path and success.

7.1 Challenges and barriers faced by artists

The existing evidence suggests that, both in the existing economic climate and in the longer term, visual artists face significant economic challenges, which may deter some from entering or continuing a career as an artist. Economic challenges to artists continuing a successful career include: lack of work opportunities; lack of financial return; lack of time to spend on art due to other jobs or family responsibilities; and the cost of materials, equipment and studio space. There could be more understanding of who is most affected by these barriers, and more detailed understanding of expense costs.

The primary research stage of this research provides an opportunity to explore how artists' incomes are composed in 2016, looking at: the different art-related sources of income artists earn through; how much income is derived from each; and other forms of income they rely on to supplement their art practice such as additional jobs; benefits, savings, support from family or spouse, and any other means that artists use to make ends meet.

7.2 Social, cultural and environmental factors

It is clear from the literature that a number of factors can impact on artists in beginning, continuing and progressing their career, both positively and negatively. Evidence suggests that the most important factors to advance a career in the visuals arts include: hard work/persistence; self-motivation; the artist's talent; encouragement; critical timing; and training. Reasons artists might not pursue a career in the visual arts include: higher/steadier pay in other fields; artistic work opportunities not available; change in interests; debt; and lack of networks.

Existing evidence demonstrates that the visual arts workforce is highly qualified, but that art degrees do not always provide the full range of skills needed to pursue a successful and sustainable career as a freelancing artist. Previous research has highlighted the importance of business skills in assisting artists to pursue successful careers, such as skills in marketing and promotion, accessing funding and understanding of intellectual property rights.

There is limited evidence regarding how graduates and other new artists enter the profession, and how social, cultural and environmental factors are experienced by artists at this or other career stages. Whilst there has been some discussion of how such factors may disproportionately affect certain demographic groups, this was found to be lacking in existing literature.

7.3 Geography of artists

The distribution of artists around England is not uniform. London has historically dominated with the North West, South East and South West also being home to relatively large numbers of artists. The high cost of living and practicing art in London is assumed to be having an effect on artists, however there is so far little robust evidence to support this. A large scale survey may identify any emerging regional hotspots for artists, and if repeated over time could observe any trends in movement to or from the capital.

Whilst the evidence found pays some attention to different challenges and issues in different regions (such as studio rent prices) there is little in-depth insight into these differences, nor on how mobile artists need to be to access markets and opportunities. This will be explored further in our primary survey data analysis.

7.4 Variation between sub-art forms and their relationship with Creative Industries

There is a lack of existing evidence on the variations between sub-artforms. This will be explored further in the analysis of our primary survey data.

Many artists hold additional jobs to supplement their practice income, both related to art and not. For some these are a necessary evil which detracts from the time and creativity they have available for their practice, while others appreciate the opportunity to use or develop their skills in alternative ways. Relationships with the broader Creative Industries do exist, however, the evidence predominantly assesses the need for artists to take second-jobs and how many of these are in the wider Creative Industries rather than exploring commercial links and economic spillovers. Further understanding is needed of the non-art jobs which artists perform to make a living, what sectors these non-art jobs are in, how much time artists spend in these non-art jobs, how much income artists make from these jobs, and whether their artistic skills and experience are utilised fully in these jobs.

7.5 Priority evidence gaps to be addressed in the Livelihoods of Visual Artists study

This literature and data review is extensive. However, as the preceding discussion shows, the existing evidence does not comprehensively address the research aims. The need to have better and more specific data to answer the questions posed by the research aims demonstrates the need for the Artists Livelihoods survey which has been delivered as the primary data collection element of this study.

Therefore, a key aim of the primary data collection element of this study is to help fill gaps in the existing evidence base, primarily seeking to investigate the research aims set out at the beginning.

8. Appendix

8.1 Official statistics' definition of artists

The analysis of secondary data can often be useful when attempting to define a wide-ranging and diverse sector or profession. One of the disadvantages of analysis of official data sources, however, is that the structure of those data sources and the standardised classifications used within them can be restrictive. Arts industries and occupations tend not to easily fit standard classifications. The Office of National Statistics (ONS) use a system of Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) codes to classify industries and jobs respectively. In order to extract detail specifically about visual artists using ONS datasets, a definition of visual artists is required based on SIC and SOC codes. This is challenging because existing ideas on the range of forms which comprise visual art do not easily align with the SIC and SOC systems.

According to the ONS, an artist is someone who *'creates artistic works using appropriate techniques, materials and media; designs artwork and illustrations; and restores damaged pieces of art'.* This is the definition of people who sit within the SOC code 3411 (Artists), see Table 9.

Table 9: Positioning of art occupations within Standard Occupational Classification system

Major group	Sub-major group	Minor group	Unit group
***3** Associate professional and technical occupations*	***34** Culture, media and sports occupations*	***341** Artistic, literary and media occupations*	**3411 Artists**
			3412 Authors, writers and translators
			3413 Actors, entertainers and presenters
			3414 Dancers and choreographers
			3415 Musicians
			3416 Arts officers, producers and directors
			3417 Photographers, audio-visual and broadcasting equipment operators
		342 Design Occupations	3421 Graphic designers
			3422 Product, clothing and related designers

Source: ONS (2010) Standard Occupational Classification 2010: Volume 1 structure and descriptions of unit groups

Artistic creation includes: *(i) activities of individual artists such as sculptors, painters, cartoonists, engravers, etchers etc; (ii) activities of individual writers, for all subjects including fictional writing, technical writing etc.; (iii) activities of independent journalists, and (iv) restoring of works of art such as paintings etc.'* This is the definition of activities within the SIC Code 90.03 (Artistic Creation), see Table 10.

Table 10: Positioning of art activities within Standard Industrial Classification system

Section	Division	Group	Class
***M** Professional, Scientific and Technical Activities*	***74** Other professional, scientific and technical activities*	***74.1** Specialised design activities*	74.10 Specialised design activities
		***74.2** Photographic activities*	74.20 Photographic activities
***R** Arts, entertainment and recreation*	***90** Creative, arts and entertainment activities*	***90.0** Creative, arts and entertainment activities*	90.01 Performing arts
			90.02 Support activities to performing arts
			90.03 Artistic creation
			90.04 Operation of arts facilities

Source: ONS (2007) UK Standard Industrial Classification of Economic Activities 2007: structure and explanatory notes

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