

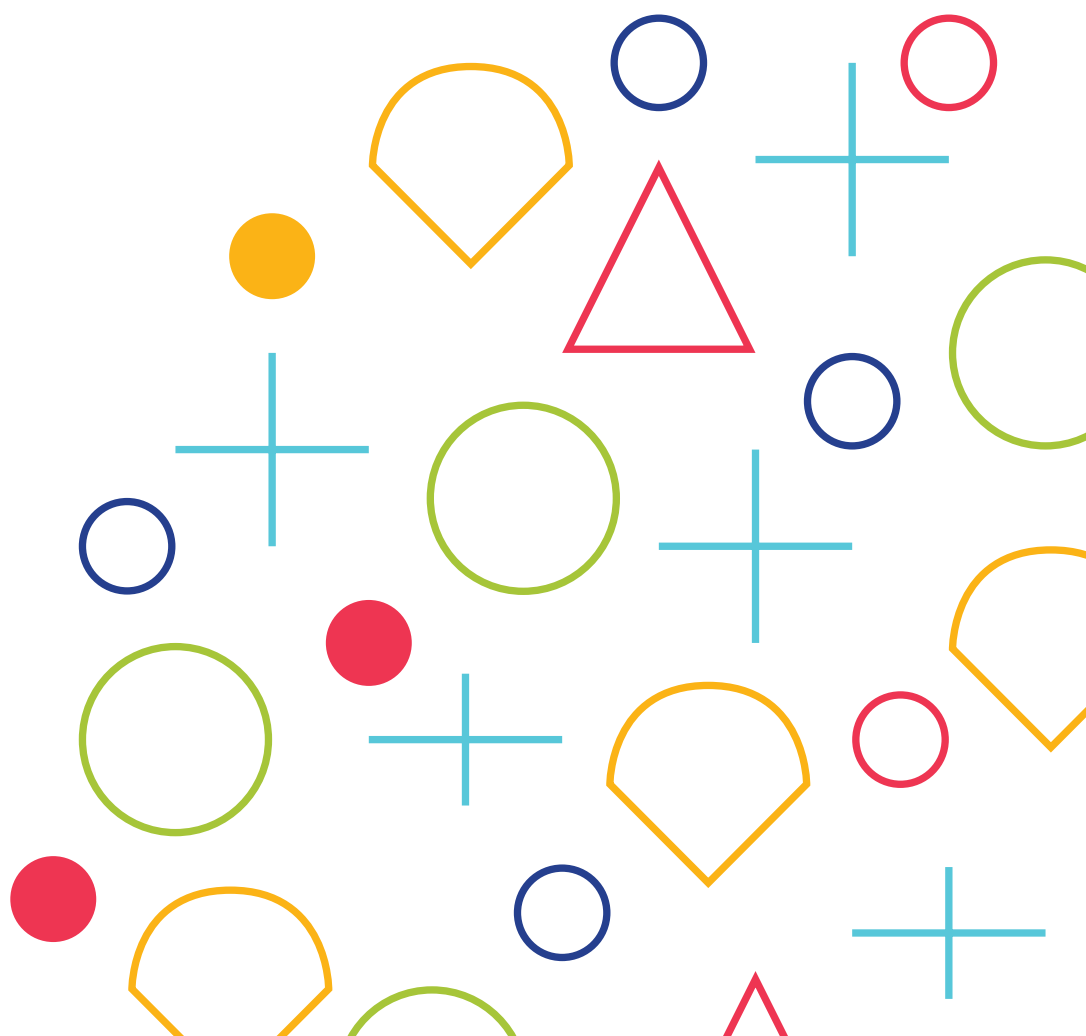
Mapping the Visual Arts in Scotland

Survey of Individuals Working in the Visual Arts Sector in Scotland

Undertaken by the Scottish Contemporary Art Network (SCAN)
On behalf of Creative Scotland

A Report of Key Findings

Prepared by Rachel Blanche
December 2015





SCOTTISH
CONTEMPORARY
ART
NETWORK



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Introduction

The Scottish Contemporary Art Network (SCAN) was commissioned to undertake the mapping phase as part of Creative Scotland's Visual Arts Sector Review. As part of this mapping work two surveys have been undertaken to capture the experiences of people working in the visual arts in Scotland as well as key indicators about how the sector functions and inter-relates. The purpose of the work is to provide an overview of the people, places, resources and relationships that make up the sector; to identify strengths, opportunities and challenges; and to inform a process of consultation about future priorities and ways of working.

Mapping the visual arts sector

A survey for Individuals was created to capture insights from people working across the sector – both independent workers and those employed in venues and institutions – about their work, their income and what matters most to them in developing their work in Scotland.

A separate survey for Organisations was designed to capture the scope, focus and range of experiences of visual arts organisations operating in Scotland. It encompasses organisations of all scales and types, from artist-led spaces and collectives to publicly funded venues and higher education institutions.

Both surveys were accessible online for one month from 19 September-19 October 2015, with assistance available for anyone with support needed to complete the survey. Both surveys offered anonymity to the respondents and no individuals or organisations have been identified in the reporting.

This report presents findings relating to Individuals working in the visual arts in Scotland.

Insights on the work and experiences of Scottish visual arts organisations are reported separately.

The surveys have been designed to enable benchmarking alongside other current datasets, specifically:

- *The Scottish Artist Union's Annual Membership Survey*
- *Sector surveys undertaken by Culture Sparks in 2012*
- *Creative & Cultural Skills Visual Arts Blueprint 2009*
- *Creative & Cultural Skills Visual Arts Statistics 2013-14.*

The online surveys were disseminated through the sector by SCAN with support from other key networks for the visual arts in Scotland: engage Scotland; WASPS and the Scottish Artists Union. Creative Scotland also promoted the surveys through its networks. In addition the surveys were directly emailed to organisations known across the sector to enable staff to complete the Individuals survey as individuals working in the sector.

This report offers initial analysis of the dataset which is rich in detail and may be separated out into discreet data strands to enable deeper insights into the specificities of different parts of the sector. The scale of the dataset, together with the range of 'identifiers' built into the survey, offers the potential for further analysis. In addition the surveys have collected substantial qualitative data with significant scope for content analysis beyond the capacity of this report.

Whose experiences are we reporting?

A total of 680 people working across the visual arts sector responded to the survey for Individuals. They represent:

- Visual arts professionals across the country
- People working in diverse roles and settings across a spectrum of disciplines
- Self-employed and employed people
- Perspectives from various career stages.

For the purposes of this report, we have isolated data strands specific to groups within the sector, in order to rationalise findings and contextualise them through the following important lenses:

People making art, self-identifying as Artists

People working with art, as Gallerists, Curators, Producers and Directors

People working in Self-Employment

People who have worked in the sector for 0–5 years, considered for the purposes of this analysis as ‘early career’

People who have worked in the sector for 6–15 years, considered ‘mid-career’

People who have worked in the sector for more than 16 years, considered for the purposes of this reporting as ‘advanced career’

How our sample relates to existing benchmarks

In order to contextualise the dataset used for this report, it is prudent to position it against existing benchmarks for the visual arts sector. In this way we can identify any ways in which this dataset may be skewed and highlight possible caveats to the findings.

Proportions of Artist and Arts Education respondents

Creative & Cultural Skills, in their published statistics for 2012–13, report visual arts employment in the UK across three categories: Artists, Art Retail and Visual Arts Education. According to their data, 89% of the UK-wide visual arts sector comprises artists.¹ The dataset from the survey reported here reflects a lower proportion of artists, with 72% of the 636 people who defined their role(s) in the visual arts self-identifying as an ‘Artist’.

According to the same UK-wide statistics for 2012–13, Art Retail accounts for 8% of the visual arts sector, and Visual Arts Education

makes up 4%.² The respondents for this survey include 56 people working as ‘gallerists’ who comprise 8% of the sample. A total of 143 respondents (22%) cite ‘workshop facilitator or tutor’ as part of their role and 48 (7%) identify a role as a ‘learning and engagement specialist’. The sample for this survey therefore comprises a greater proportion of people engaged in forms of Visual Arts Education than is representative of the sector as it is currently understood.

¹Visual Arts Statistics 2012–13 Creative & Cultural Skills

²Visual Arts Statistics 2012–13 Creative & Cultural Skills

Age range of respondents

Based on age data provided by 465 of the respondents in this survey, the age range of the sample may be charted below alongside current UK-wide statistics. The age of the workforce reflected in this survey seems slightly skewed towards people in the 40–49 and 50–59 age categories, who make up a

larger proportion of this sample than in the representative sector population. People under the age of 30 make up 16% of the respondents for this survey, though they comprised 12% of the visual arts workforce in 2013–14.

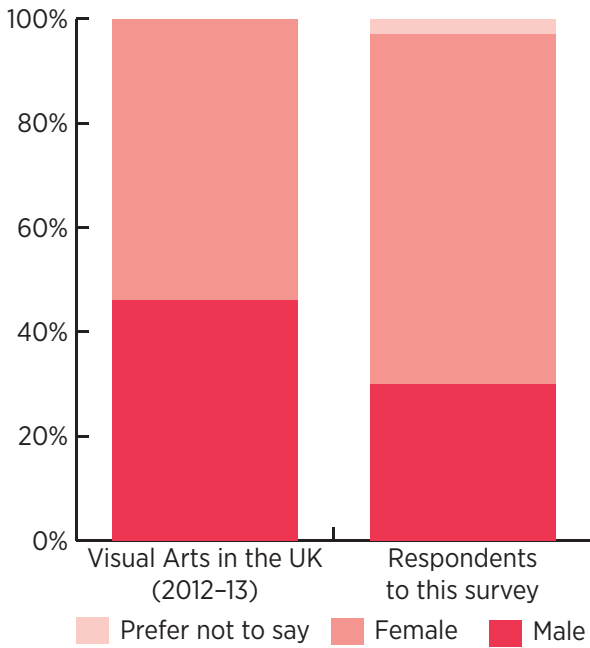
Figure 1: Age range of people working in the sector (%)

	Under 25	25-29	30-39	40-49	50-59	60+
Visual Arts in UK (2012-13)						
	6	15	23	26	12	19
Respondents in this survey (n465)						
	5	11	22	30	21	12

Gender

As may be seen in the Table below, the gender balance in the sample generated by this survey is weighted more heavily towards females working in the sector than is representative in UK statistics.

Figure 2: Gender balance in the sector



Ethnic Diversity

The ethnic diversity of the sample generated by this survey is slightly lower compared with how the visual arts sector is represented across the UK. 2% stated they are from a minority Ethnic background compared with 5% in the Visual Arts UK report. 4% of respondents to this survey preferred not to specify their ethnic background, with 2% stating 'Other'.

Employment patterns

Existing evidence from the sector suggests that the majority of people working in the visual arts in the UK do so in a freelance capacity; just over three-quarters compared to one quarter who are employees in the sector.

This survey reflects this, with 61% of respondents stating that they are self-employed, compared to one third (31%) of respondents who have either a permanent or fixed-term employed position in the sector. (The remainder of the sample are either 'not employed' or 'retired').

The slightly higher proportion of employed people in this survey is likely to be because the survey was disseminated through organisations as well as through artist membership networks.

Representation of the Scottish sector

The Creative & Cultural Skills 2009 *Visual Arts Blueprint* estimated the number of artists in the UK at just under 37,500. That report stated that approximately 7% of the workforce was based in Scotland. This extrapolates to a Scottish workforce of just over 2,600 people working in the visual arts sector in 2009³.

Creative & Cultural Skills 2013-14 statistics record 48,420 people working the visual arts industry in the UK. On the assumption that the Scottish sector still represented 7% of that figure, the workforce in Scotland would be just under 3,400.

If these figures are accurate then the 680 respondents in this survey may be considered to represent 20%-25% of an estimated Scottish workforce numbering between 2,600 and 3,400 people.

³ *Visual Arts Statistics 2012-13* Creative & Cultural Skills. The Creative & Cultural Skills studies define the visual arts sector as including individual artists, publicly-funded institutions, commercial galleries, studios, trade associations, art fairs and a range of employees, consultants, freelancers and volunteers. These parameters are consistent with the sample targeted for this survey.



Headline Findings

Roles in the visual arts

Of the 680 people who answered this survey:

72% have an Artistic role as part of their practice

24% undertake a Curatorial role

22% work as Workshop Facilitators or Tutors

19% are Academics or Lecturers

12% are Writers

12% are Producers

And 11% have a role as a Volunteer

A majority of respondents also have parallel roles across the sector. For people working as artists the most common are Workshop Facilitators (29% of people who identified as artists), Academics or Lecturers (20%), Curators (15%), Writers (11%) and Community Workers (10%).

Contexts and settings for work

The respondents in the survey work in a range of contexts and settings. The most common contexts identified in this survey are:

- *Publicly-funded Galleries* (49% of respondents)
- *Artist-led spaces* (44%)
- and *Arts and Heritage Organisations* (38%).

Festivals, commercial galleries and studio/workshop provision are also significant (each around 30% of the sample).

How people work

A significant proportion (61%) of respondents work in a freelance/self-employed capacity, a quarter of them also doing part-time jobs in organisations. This suggests that many of the 31% of respondents with roles in arts organisations are doing so part-time within a portfolio of visual arts work.

Of the 439 respondents who need a designated studio or workspace, the majority (63%) work from home, with 42% elsewhere and 12% making their work *in situ*.

Nature of unpaid work

Not all of the work contributed to Scotland's visual arts sector provides an income for the practitioner. In terms of working hours contributed to the sector, on average the respondents spend up to 35 hours per week, of which as much as 75% is likely (for 45% of artists) to be unpaid or voluntary.

The nature of unpaid work centres on visual arts practice (89%), although other significant activities include independent curatorial projects (25%) and art writing and blogging (25%).

Earning levels

Overall, across *all respondent groups*, a large proportion (31% of respondents) earned less than £5,000 in their 'best' year of the last five years. For 72% of respondents their maximum earnings during the last five years came in at less than £20,000, with only 11% earning over £30,000.

The average (mean) *total income* across all sources of work, for the whole respondent sample is £17,256 per annum.

- For self-employed respondents the average dips to £14,933
- For people within the first five years of their career, the average is £13,125
- This rises to an average of £17,252 across respondents who have worked in the sector for 5-15 years
- The average total income is the highest for people with 15 years or more experience in the sector at £20,930 per annum.

Self-employed respondents (87% of whom are artists and 30% workshop facilitators) tend to earn less than the overall average, with the majority (80%) earning less than £20,000 in their 'best' year, half earning less than £10,000 and just 31% earning less than £5,000 as their *maximum total annual income*.

For self-employed respondents:

- the visual arts is the main source of income for half (54%) of them
- 63% work up to or more than 35 hours per week in the visual arts
- 64% earned a minimum of less than £5000 during the last five years
- And for 84% their minimum income was less than £10,000
- Only 5% earned above £20,000 as their minimum income.

Supplementary income

A total of 42% respondents said that they supplement their visual arts income with outside sources.

More than half work additional jobs for *14 hours per week or less*, representing up to two days a week or 0.4FTE outside the sector. However almost a fifth work *full-time* in supplementary jobs (up to 35 hours per week, or more), and a third work 4 days a week or more.

It is noted that a number of people reported relying on spouses' income (11 respondents) or family support (6 respondents), as well as personal savings and inheritance (2 respondents) to support their practice in the sector and offset their low incomes.

Reliance on visual arts income

45% of respondents state that their *entire income* comes from their visual arts work. For another 9% up to *95% of their total income* comes from visual arts. This means that more than half of our respondents gain almost all their income from visual arts work.

Salaried work stands out as the most important source of income for the most respondents (85%), with an overall rating attributed of 1.54 (where 1 signifies the most important). Other common sources of income ranked of high importance are Sales of Artwork, Fees and Commissions.

Operating expenses, deficit and financial vulnerability

Respondents were asked about their operating costs and expenses, including materials, premises, etc. A total of 42% of respondents expend £1,000-£5,000 each year as part of their work or practice. Another fifth (19%) pay out between £5,000 and £10,000 annually. These sums reduce net income from already low earnings across the sector.

The majority (72%) of respondents are not in receipt of any welfare benefits. *Working Tax Credit* and *Child Tax Credit* are the most common benefits accessed by the respondents in this survey, cited by 15% and 12% respectively.

A total of 42% respondents have further pension provision arrangements in place beyond expectations of a statutory state pension.

Access to Public funding

40% of respondents to this survey have *not applied* for public funds in the last five years. Just under a fifth more (19%) have only *applied once* for public funding in this period. A small minority reports regularly and routinely applying for public funding, with 4% applying up to 10 times in five years and 3% more than 10 times. This suggests that the majority of people working in the visual arts sector are not reliant on making regular grant application public funding is considered most valuable for:

Making or Producing Artwork (selected by 61% of the respondents)

Research and Development (49%)

Exhibitions of Artwork (45%) and Exhibition Making/ Curatorial Projects (39%)

Residency is another important form of support (45%), along with *International Work* (42%). *Training and Professional Development* is also seen as reliant on public funding (36%).

Development support for the sector

Respondents have undertaken a range of professional development activities in the last five years, the most accessed being collaborative work (65%), Research (63%), Residencies (43%), Skills Sharing (43%), Peer to Peer Mentoring (40%) and Technical/ Creative Skills Training (40%).

The majority of this professional development activity in the sector is self-funded.

In terms of what is most useful *at the present point in their career*, overall respondents identified Residencies (45% of responses); Research (42%); Collaborative Work (36%); Peer to Peer Mentoring (32%); Technical and Creative Skills Training (26%) and Business Support (20%).

Residencies are particularly valued by respondents who are less than five years into their career. *Peer to Peer Mentoring* also stands out as a priority activity for this group, favoured by a larger proportion of early and mid-career respondents than those more advanced in their careers.

Reach and impact

More than half of the 515 people who answered this question have a reach and impact beyond Scotland, either UK-wide (25%) or internationally (30%).

Around a fifth of the respondents describe their work as having a Scotland-wide impact. The remaining quarter identify their work at a more localised level, as having regional impact (11%) or local impact (14%).

Respondents listed more than 50 countries that they regularly work in across the globe, with the most commonly cited being USA, Canada, Germany, France and Italy.

Priority and specific audiences

The top five priority and specific audiences engaged by and ranked by respondents are:

1. *Peers/Other Artists/Arts Professionals*
2. *Local / Geographic Communities*
3. *International Audiences*
4. *Buyers*
5. *Collectors*

Distribution channels for visual arts work

Exhibitions and Gallery Talks emerge as a significant channel for the majority of respondents. *Online platforms* rank second in importance, followed by *Festivals*, *Workshops*, and *Commercial Galleries* all of which are relevant to around a third of the respondent group.

Most effective means of public engagement

The most effective way for engaging the public identified by respondents is *Through Exhibitions and Artwork (including screenings and performances)*, selected by 83%. Other significant forms of engagement occur Online and through *Workshops/ Talks/ Activity programmes*.

Most important online platforms

In order of precedence, the top 5 most effective social media and online platforms used by respondents are:

- Respondents' own websites
- Respondents' own Facebook profiles
- Venue or agency-controlled Facebook
- Twitter
- Instagram.

Partnership and collaboration

The majority of respondents (56%) rate working in partnership and collaboration as very or *extremely important* in their visual arts work. On a scale where 5 is highest and 1 is lowest, the overall score averaged across all respondents is 3.58.

In total 17% stated that partnership or collaborative working is of no or limited importance in their work.

Most important connections, organisations and services

Respondents were asked who they work with most often and what services and facilities they most rely on for their visual arts work, to give a sense of how the sector interconnects.

...For Artists:

The most important people that Artists work with are (in order of importance):

1. *(other) Artists*
2. *Curators*
3. *Gallerists*
4. *Academics or Lecturers*
5. *Workshop Facilitators or Tutors*
6. *Technicians*

The most important organisations and services for Artists are:

1. *Artist-led spaces*
2. *Publicly-funded galleries*
3. *Commercial galleries*
4. *Residency centres*
5. *Festivals*
6. *Studio/Workshop providers*
7. *Third sector/community focussed organisations*

...For Curators, Gallerists, Producers and Directors:

The most important people that Curators, Gallerists, Producers and Directors work with are:

1. *Artists*

- 2-4. *(other) Curators, then Producers, then Gallerists*

5. *Technicians*

6. *Learning and Engagement Specialists*

7. *Directors or CEOs*

8. *Local Authority officers*

The most important organisations and services for Curators, Gallerists, Producers and Directors are:

1. *Artist-led spaces*

2. *Publicly funded galleries*

3. *Festivals*

4. *Arts & Heritage organisations*

5. *Residency Centres*

6. *Commercial galleries*

...For Workshop Facilitators or Tutors, and Learning and Engagement Specialists:

The most important people that Workshop Facilitators or Tutors, and Learning and Engagement Specialists work with are:

1. *Artists*

2. *Curators*

- 3-4. *(Other) Learning and Engagement Specialists then Workshop Facilitators or Tutors*

5. *Gallerists*

6. *Producers*

7. *Local Authority Officers*

The most important organisations and services for Workshop Facilitators or Tutors, and Learning and Engagement Specialists are:

1. *Artist-led spaces*

2. *Publicly funded galleries*

3. *Arts & Heritage organisations*

4. *Residency Centres*

5. *Commercial Galleries*

6. *Third Sector/Community focussed organisations,*

7. *Festivals*

8. *Studios/Workshop Providers*

...Common themes

Artists and curators are the most important for all three groups, closely followed by *Gallerists*.

Connections are most important to artists with all types of connection ranked higher for this group rather than the other groups in the survey.

Effective ways of staying connected

The most effective means of finding out what is happening in the sector and sharing good practice in respondents' fields are:

In order of effectiveness

Online
(cited by 78% of respondents)


Informal peer to peer communication (74%)

Gallery or public venue events (61%)

Engagement with networks and membership organisations

People working in the sector engage strongly with networks and membership organisations. Among the 482 who responded on this issue, the majority of respondents (87%) engage at least *annually* with formal networks or membership organisations. Of these, 9% of respondents engage weekly and the same proportion again engages on a monthly basis. Almost half of respondents (48%) engage several times a year.

Respondents engage far more frequently with their informal networks. A third of respondents (33%) engage weekly with their informal networks, and another 18% engage monthly. Some 38% of respondents connect several times a year with informal networks, with a minority engaging once a year (3%) or never (8%).

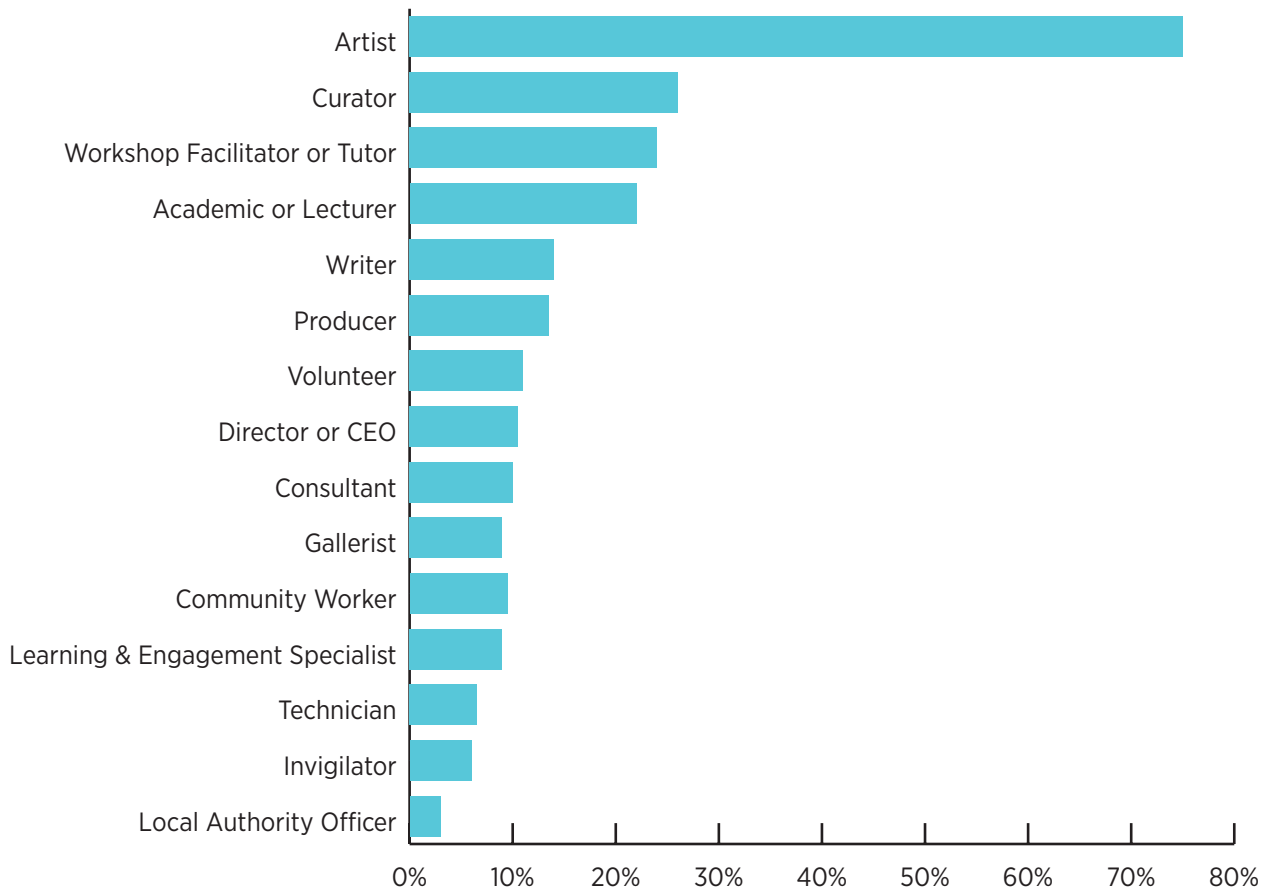


1.
**Breadth of Roles
and Settings
in the Sector**

Diverse roles within the visual arts sector

The survey reflects the diverse roles undertaken by people working in the sector as shown in Figure 3 below.

Figure 3: Role/s occupied by respondents within the visual arts (more than one may be selected) (n636)



The majority of respondents (458 people representing 72% of the sample) occupy a role as a practicing artist. Those respondents identifying as artists also undertake a number of parallel roles across the spectrum

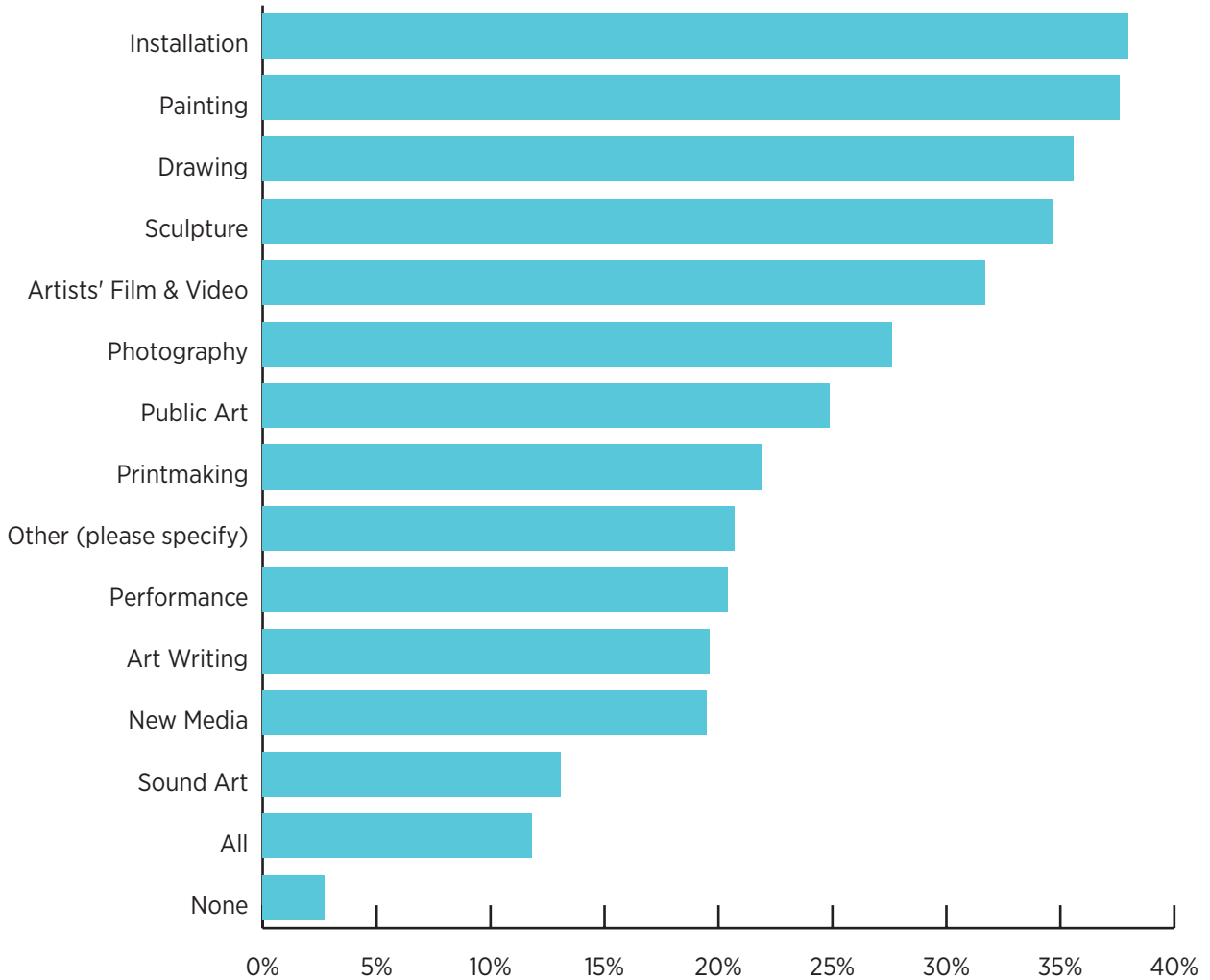
listed above, predominantly as Workshop Facilitators (28% of the Artists), Academics or Lecturers (20%), Curators (15%), Writers (11%) and Community Workers (10% of Artists).

Artform specialisms

The respondents in the survey were asked to identify from a list any areas of specialism that may apply to their work. A large number of respondents answered this question

(n663) and demonstrate a consistent spread across a range of disciplines as can be seen below, Twelve percent stated that they work across all media listed.

Figure 4: Areas of specialism applying to respondents' work (more than one could be selected) (n663)



'Other' specialisms cited included work with Glass, Metal, Ceramics, Street and Outdoor Arts, and Art Writing.



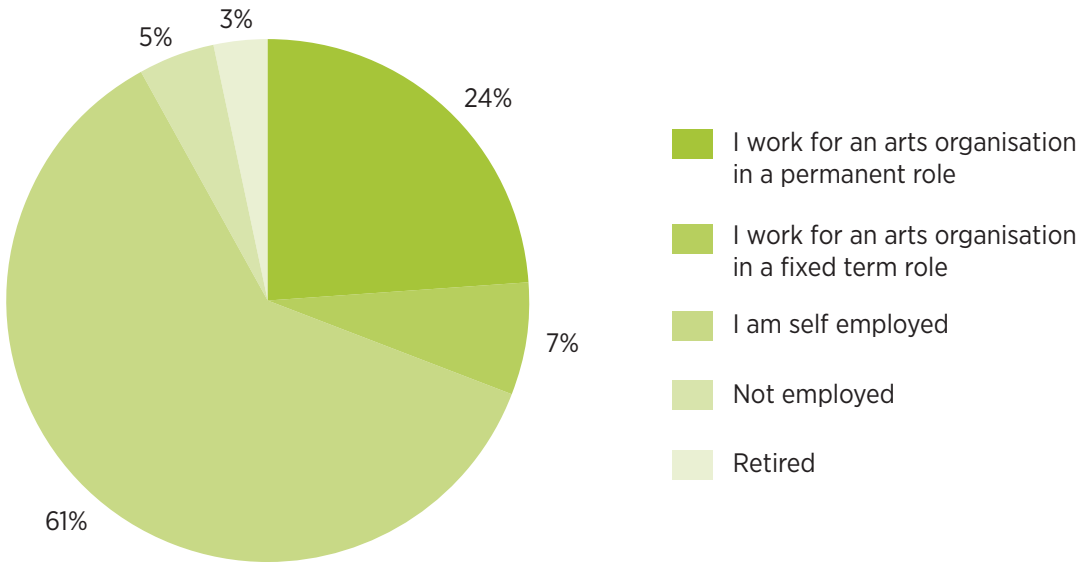
2. Working Patterns in the Sector

Employment status

A total of 61% of the respondents in this survey work in a freelance or independent capacity. This is consistent with other data about the sector. 24% have a permanent paid role in an arts organisation, and a further 7% work on a fixed term contract.

Other significant employment conditions highlighted by respondents included 'Zero Hours Contracts' in the context of teaching posts with further and higher education organisations.

Figure 5: How respondents describe their employment status in the visual arts (n629)

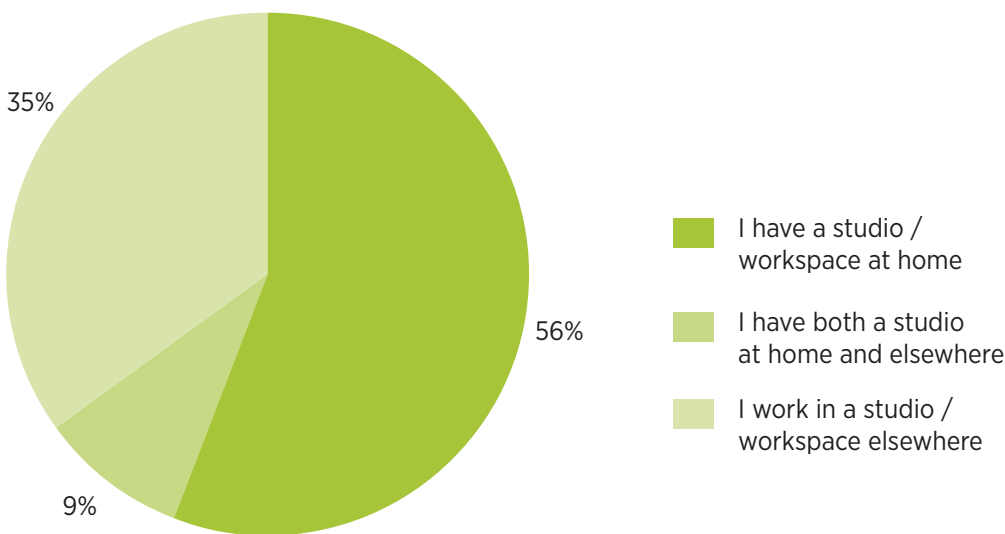


Use of studio space

We wanted to know how heavily people producing work rely on production facilities to produce their work. Of the 439 respondents⁴ who need a designated

studio or workspace, the majority (56%) only selected work from home, 9% selected work from home or elsewhere and 35% have a studio/ workshop elsewhere.

Figure 6: Use of studio space



⁴ Taking out of the equation the 26% of 593 people who answered this question as 'not applicable'

Work undertaken in the sector

Not all of the visual arts related work provides an income for the practitioner. A full 15% of the respondents on this issue (n616) report that their visual arts work provides no income. For those earning income from their

visual arts work (n529), 63% state that it is their main source of income. The remaining 37% consider their visual arts work to be their secondary income source.

Working hours contributed to the sector

In terms of working hours contributed to the sector, on average the respondents spend 28 to 35 hours per week, of which as much as 75% is likely (for 45% of artists) to be unpaid or voluntary.

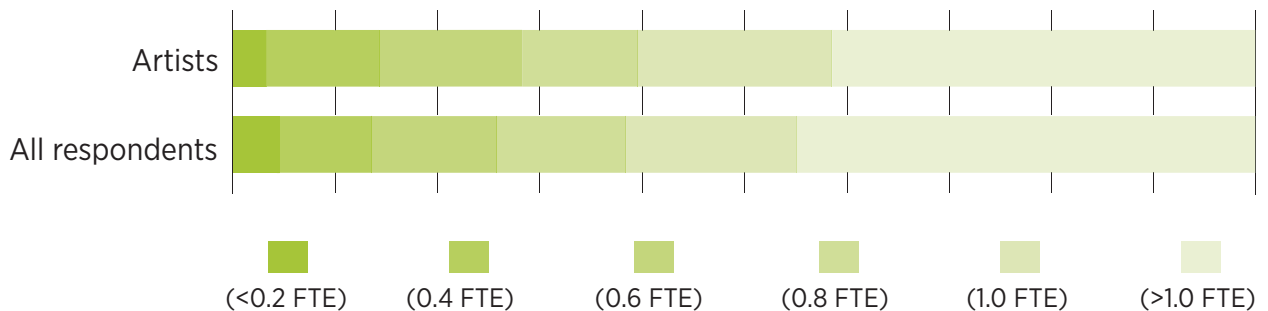
The majority (62%) of our respondents report working 28–35 hours or more each week in the visual arts, including work for an organisation and their own practice.

Artists Working hours

60% of the artists who answered this question (n423) committed more than 28 hours per week in the visual arts. 174 respondents (or 41%) stated they work more than the FTE of 35 hours, reflecting

the fact that they perform multiple roles in the sector.

Figure 7: Hours per week spent by respondents working in the visual arts, including work for an organisation, on own practice or in a self-employed capacity

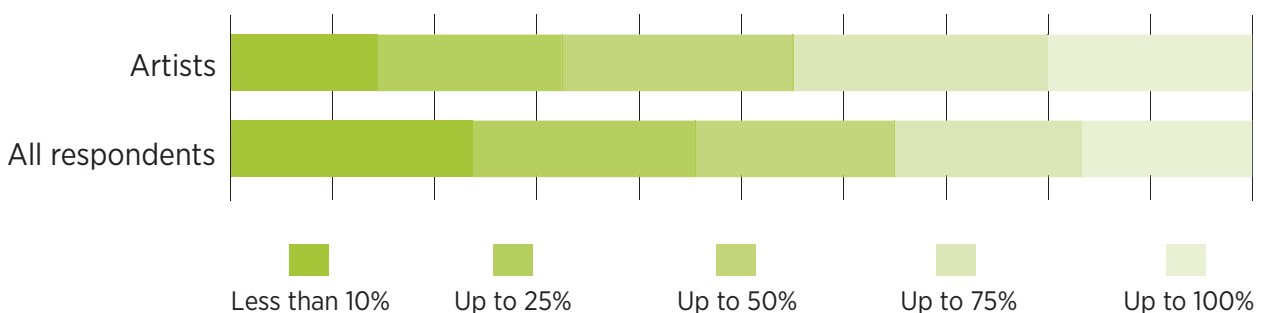


Nature and scale of unpaid work in the sector

This survey reveals a large *unpaid* contribution to the sector: 35% of the people who responded estimated that over half of the work they do in the visual arts is unpaid or undertaken on a voluntary basis (Fig 8).

Filtering results solely from those respondents who classify their role as a practicing artist, this figure rises to 45% (Fig 8)

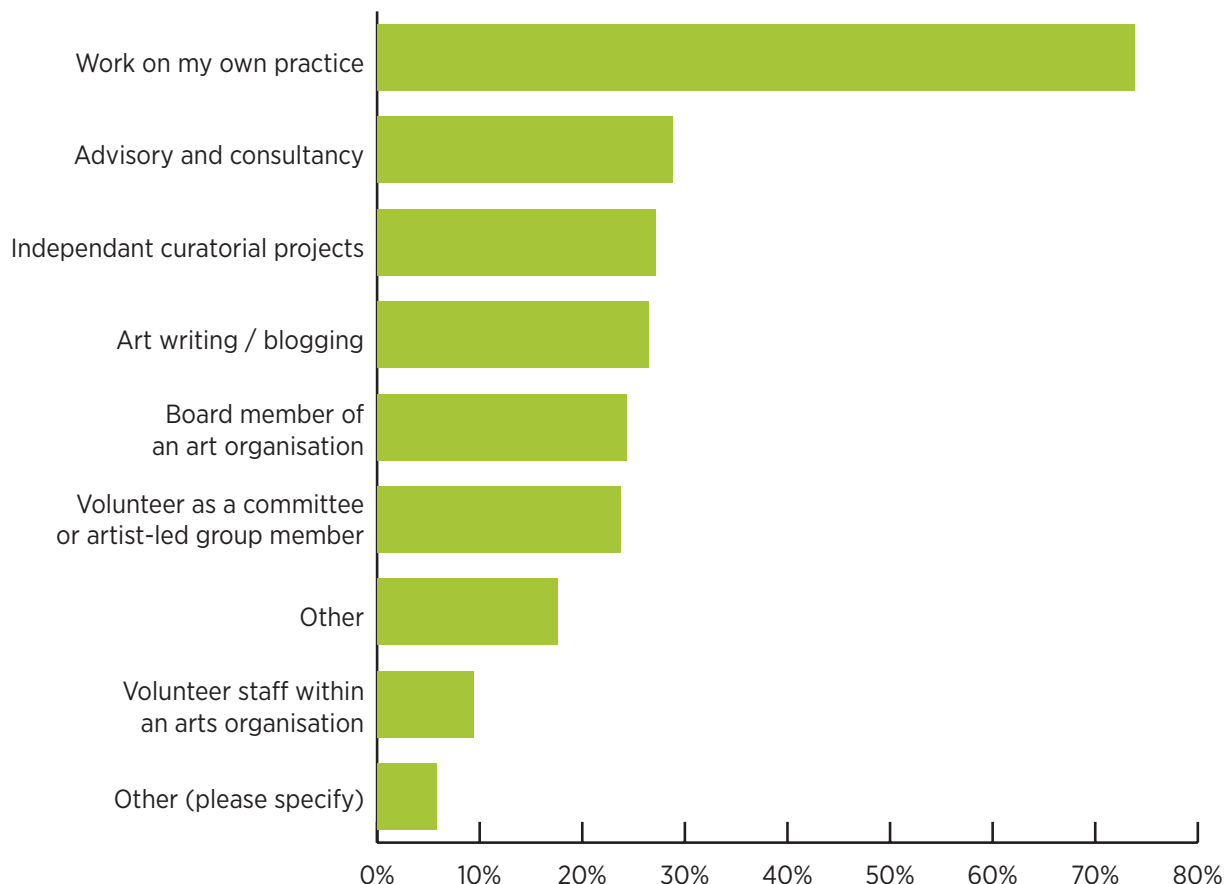
Figure 8: Percentage of hours worked per week in the visual arts that are unpaid or undertaken on a voluntary or no fee basis



As can be seen in Figure 9 below, the nature of unpaid work centres on visual arts practice (74%), although other significant activities include advisory and consultancy work

(28%), independent curatorial projects (27%) and art writing and blogging (26%) and board or committee membership.

Figure 9: Nature of work that is unpaid and or voluntary (n573)



In additional comments respondents highlighted: working beyond contract hours on projects and posts; time spent making applications or doing research for projects; preparation, planning and ideas development; and unpaid collaborations.

Volunteering

When specifying the roles they perform in their visual arts work, 11% of respondents (71 people out of 636) listed 'Volunteer' formally as one of their roles. However, of the 573 respondents who specified the nature of their unpaid work, 136 cited 'volunteer as a committee or artist-led group member' (24% of that sample) and 54 ticked 'volunteer staff within an arts organisation' (9%).

This suggests that perceptions of voluntary work in the sector differ from notions of formal volunteering. It also shows that a significant proportion of people working in the sector give their time generously to support the sector.

**“I spend more hours
on my lecturing post
than the hours I am paid for.”**

**“I work close to 70 hours / week
as a self-employed person
on my own practice,
which, due to poor sales,
is currently ‘unpaid’.”**

**“I often find myself doing
unpaid prep for
participatory / community /
education projects.”**



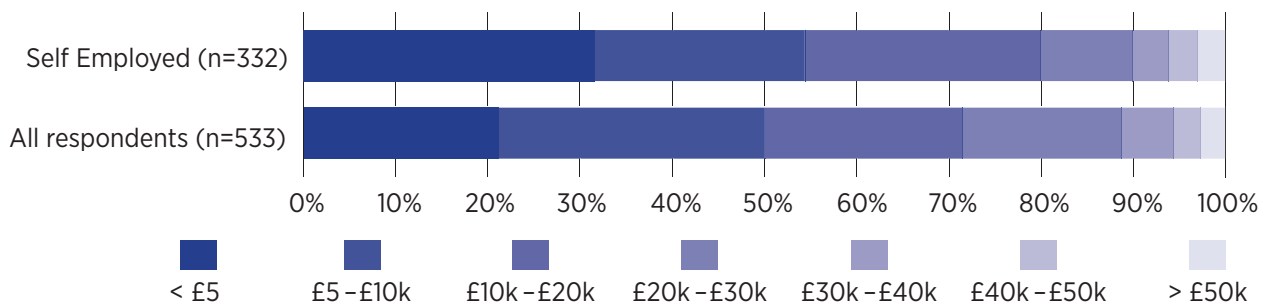
3. Income Levels in the Visual Arts Sector

Maximum and minimum earnings levels from visual arts work

Maximum earnings reported by respondents achieved in the last five years span a range of income bands, though the largest proportion (31% of respondents) earned less than £5,000 in their 'best' year. A total of 72% of respondents' maximum earnings came in at less than £20,000, with only 11% earning over £30,000 across all roles in the sector.

For self-employed respondents (*n*333) the maximum earnings are lower, with the majority 80% earning less than £20,000 in their 'best' year, 55% earning less than £10,000 and just under a third (31%) earning less than £5,000 maximum earnings.

Figure 10: Over the last 5 years what is the maximum level of income that you've made in a tax year (before tax) from your visual arts work alone? (%)

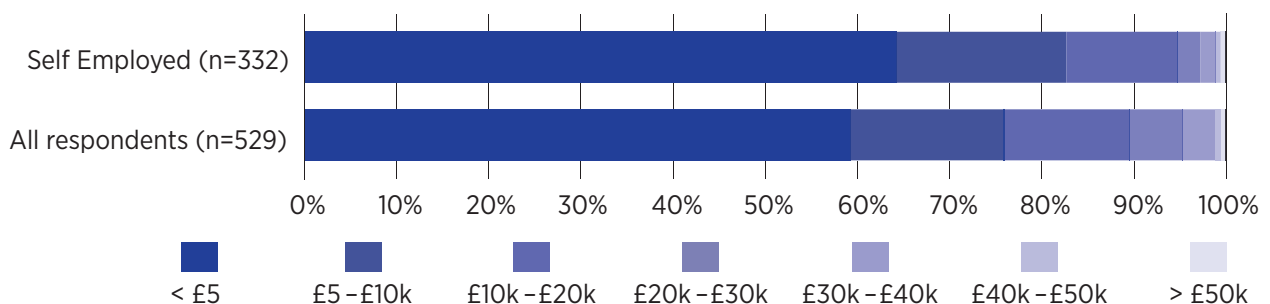


As for minimum levels of income, 59% of the respondents across the sector reported earning less than £5,000 in their leanest year within the past five years. Only 11% earned above £20,000 as their minimum income.

For self-employed respondents (*n*333), 87% of whom are artists and 30% workshop facilitators, and for more than half (53%) the visual arts is their main source of income,

and 63% of whom work up to or more than 35 hours per week in the visual arts: 64% earned a minimum of less than £5000 and for 84% their minimum income was less than £10,000. Only 5% of self-employed respondents took home more than £20,000 from their visual arts work alone in their leanest year of the past five years.

Figure 11: Over the last 5 years what is the **minimum level of income that you've made in a tax year (before tax) from your visual arts work alone? (%)**



Supplementing personal income

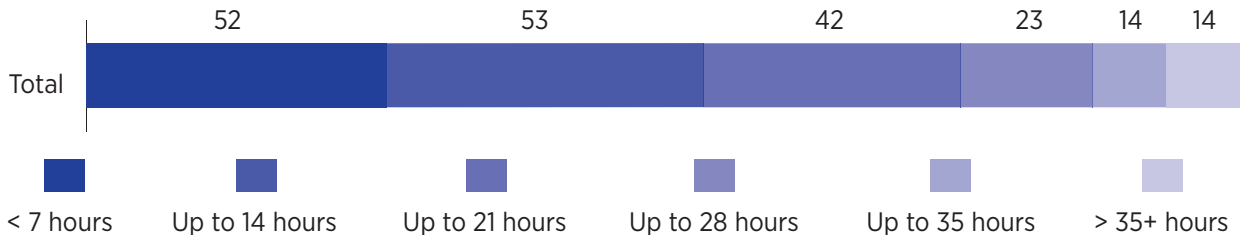
We know from existing research (from Scottish Artists Union 2014, Creative and Cultural Skills 2012) that people in the sector often supplement their income in order to

make a living wage. Of the 680 people who answered this survey, 42% (284 people) said that they supplement their visual arts income with outside sources.

More than half of this respondent group work additional jobs for 14 hours per week or less, representing up to two days a week or 0.4FTE outside the sector. However almost a

fifth of the respondents in this group report working full-time in supplementary jobs (up to 35 hours per week, or more), and a third work 4 days a week or more.

Figure 12: If you work outside of the visual arts to supplement your income, how many hours per week do you estimate this to be? (%) (n284)



Respondents were asked to indicate the nature of this other work, and to specify if it comprises Casual or Shift work or a Second Role in the Arts outwith the visual arts sector. Of the 289 respondents, 28% undertake Casual or Shift work to supplement their visual arts income and 18% work in another role in the Arts.

The majority of people who responded cited 'Other' forms of work for supplementary income (54%).

From a sample of 98 respondents who gave information on 'Other' work, this

included digital and graphic design, technology, academic and teaching roles, and alternate freelance businesses, for instance as a wedding photographer, renting property and rooms, and in one case "whatever comes along".

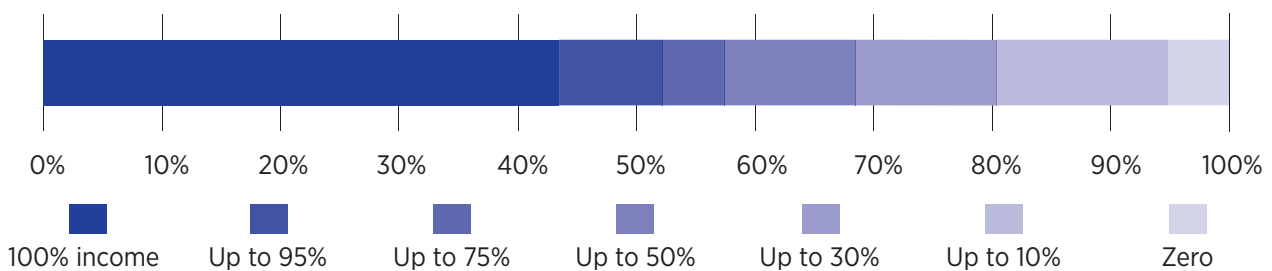
A significant number of people from this group also reported relying on spouses' income (11 respondents) or family loans and support (6 respondents), personal savings and inheritance (2 respondents) to support their practice in the sector and offset their low incomes.

Proportion of total income gained from visual arts work

Of the 534 respondents who provided information about their income, a total of 45% (239 people) stated that their entire income comes from their visual arts work. Another 9% said that up to 95% of their total

income comes from visual arts. This means that more than half of this sample is almost totally reliant on income from visual arts work.

Figure 13: Proportion of respondents' total income that comes from visual arts work (n534) (%)



Average income from all work

Respondents representing the full sector (n534) each provided a total figure for how much they earn in average a year from all of the work that they do, both primary and supplementary jobs inside and outside the visual arts sector. For artists, this includes any sales of artwork.

The average (mean) total income across the 534 respondents is £17,256.

For Self-employed respondents (n 333) the average annual income figure is £14,933

For respondents who identify as Artists (n 381) the average income is £14,668

These two groups coincide strongly, hence the consistency on the average figures.

For people within the first five years of their career (n153), the average is £13,125

This rises to an average of £17,252 across respondents who have worked in the sector for 6-15 years (n212)

And for people with 16 years or more experience in the sector (n177), the average income is £20,930.

Most important sources of income from visual arts

Figure 21 below shows prominent sources of income in order of the importance afforded to them by the 517 respondents who individually ranked the forms of income they most rely on.

- Salaried work comes out clearly as the most important source of income for the most respondents – 441 of them, representing 85% of the sample for this question – and with a rating average of 1.54 (where 1 signifies the most important).
- Sales of artwork/royalties ranks second, with a rating average of 3.00 through 417 selections.
- Fees (for instance from exhibitions or residency) were considered important by 389 respondents.
- Commissions was selected 411 times but with a slightly lower rating, averaging at 3.43.
- Grants and income from workshops were set in the middle ranking overall respondents, selected by 396 and 378 respondents respectively with average ratings of 3.25 and 3.41.
- Consulting achieved the lowest ranking overall with the least people selecting this; though it was selected by 375 of the 517 respondents.

Figure 14: Income sources most relied on by respondents, as indicated by individual ranking (n517)

Answer Options	Rating Average	Response Count	Selected by Percentage of respondents
Salaried Work	1.54	441	85%
Sale of Artwork / Royalties	3.00	417	81%
Fees (i.e. from exhibitions, residency)	3.23	389	75%
Grants	3.25	396	76%
Workshops	3.41	378	73%
Commissions	3.43	411	79%
Consulting	3.91	375	72%
(None of the above)	3.92	284	55%

Role of Local Authorities in funding work

Work supported by local authorities makes up a significant proportion of paid work: 39% state that some of the work they do is funded by a local authority. However the majority of respondents state that none of the work they do is funded by a local authority.

According to those whose work is sometimes funded by a local authority (n227), the majority occurs through freelance

commissions and projects (41%), followed by permanent and fixed term salaried posts (33%), learning/engagement activities (21%), community workshops (21%), and public art commissions (20%).

‘Other’ forms of funded support from local authorities are recorded by individual respondents as the in-kind use of a venue, and awards and grants.

Applying for public funding in the visual arts sector

The Scottish Artists Union highlights a lack of engagement by the visual arts sector with sources of public funding to develop or produce their work. In 2014 less than half of their membership (41%) had successfully applied for a public funding award and the same percentage (41%) had *never applied*. Almost one fifth (17%) had applied without success (n422)⁵.

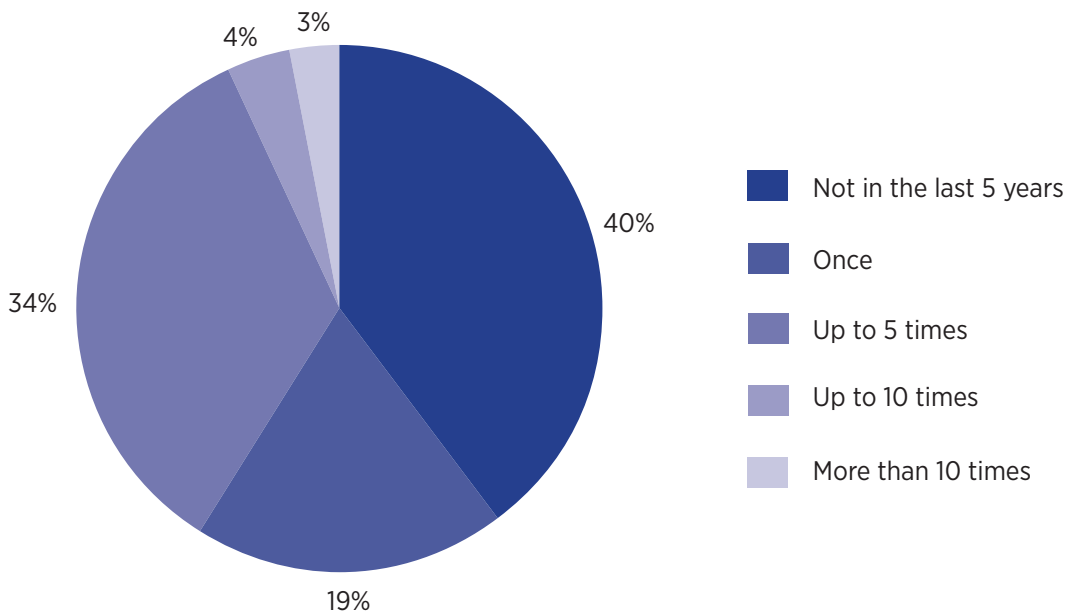
Of the respondents in this survey who provided information about their grant applications (n546): the majority (40%) have not applied for public funds in the last

five years. Just under a fifth more (19%) have only applied once for public funding in this period.

Of the remainder of the sample, a third of respondents (34%) have made up to 5 applications in five years, and only a small minority report regularly and routinely applying for public funding, with 4% applying up to 10 times in five years and 3% more than 10 times.

This data suggests that the visual arts sector is not reliant on making regular grant applications, and reinforces the SAU’s findings.

Figure 15: Applications made for public funds in the last 5 years (n546)



⁵ SAU Membership Survey 2014

Of the respondents in this survey who applied for public funding (n339), a significant proportion had been unsuccessful in all of their efforts to gain public funding (29%). At the other end of the scale, almost

a quarter of this sample had been successful in all their applications (24%). The majority of respondents who have applied for public funding had mixed success, gaining funds between 25% and 75% of the time.

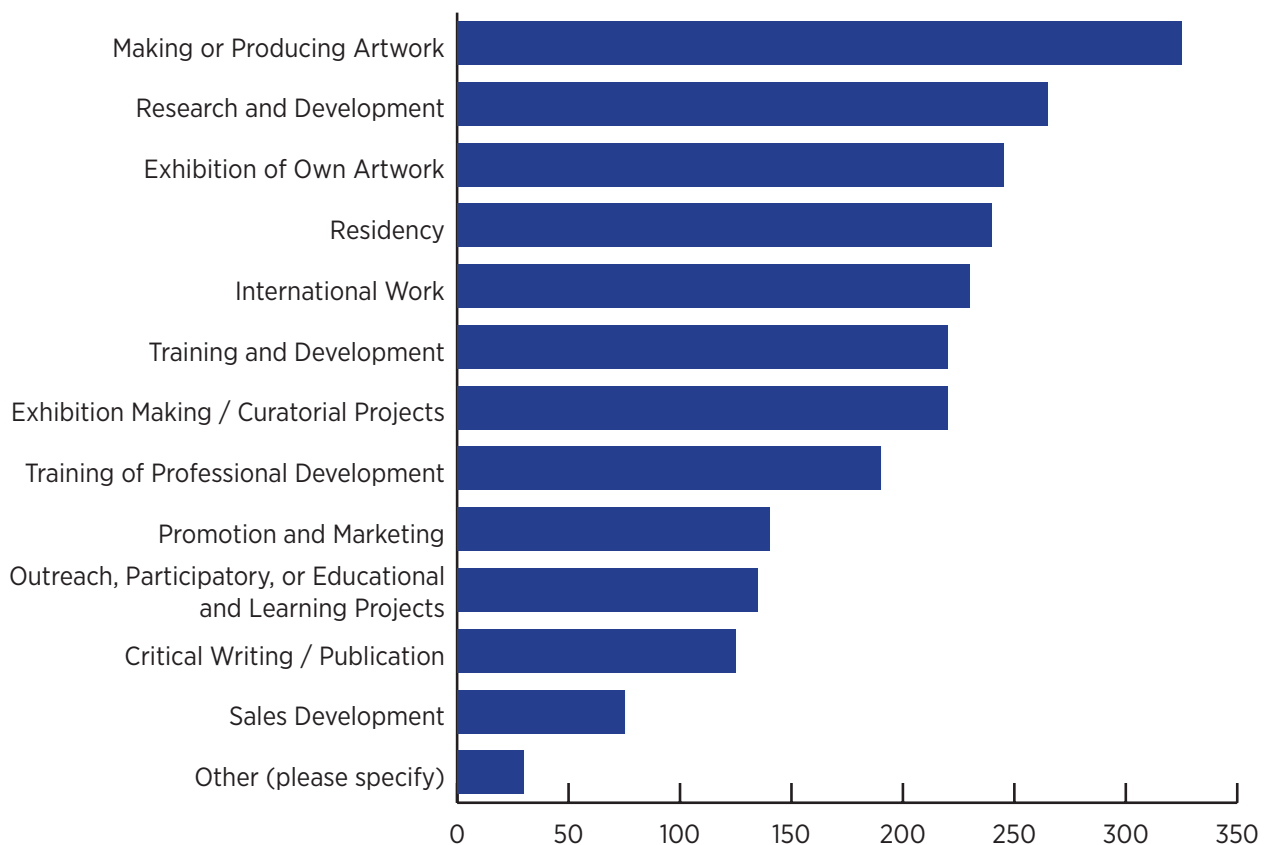
How public funds can support visual arts work

Respondents were asked to identify the aspects of their work for which public funding is most valuable, selecting all that apply.

A total of 534 people provided insights on this, resulting in the data presented below. The most valued support is for Making or Producing Artwork (selected by 61% of the respondents on this question), followed

by Research and Development (49%). Exhibitions of Artwork (45%) and Exhibition Making/Curatorial Projects (39%) together represent a substantial area of work aided by public funds. Residency is another important form of support selected by 45% of the sample, along with International Work (42%). Training and Professional Development is also seen as reliant on public funding (36%).

Figure 16: Aspects of respondents' work most helpfully supported by public funding (n534)



Operating costs for freelance and independent visual arts workers

To complete the picture on how individuals in the sector finance their work, we asked about the annual operating expenses that come out of workers' income or from their grant support, covering studios and premises, materials and equipment, facilities, business services, training and professional development, promotional costs etc.

Of the 517 people who have provided figures for their estimated annual operating expenses, 16% cite *nil* costs or that this is *not applicable* to their circumstances. Another 16% spend less than £1,000 for operating costs. We know from this survey that

63% of respondents work from home studios or workspaces, which is a likely factor in minimising costs.

However the largest proportion (42%) of the sample expends £1,000–£5,000 each year as part of their work or practice. Another fifth (19%) pay out between £5,000 and £10,000 annually.

These figures are significant given the finding from this survey that the average annual total income for respondents is £17,256, dipping to an average of £13,125 for those starting out in the sector.

Figure 17: Estimated annual operating expenses of respondents who work independently or freelance (n517)

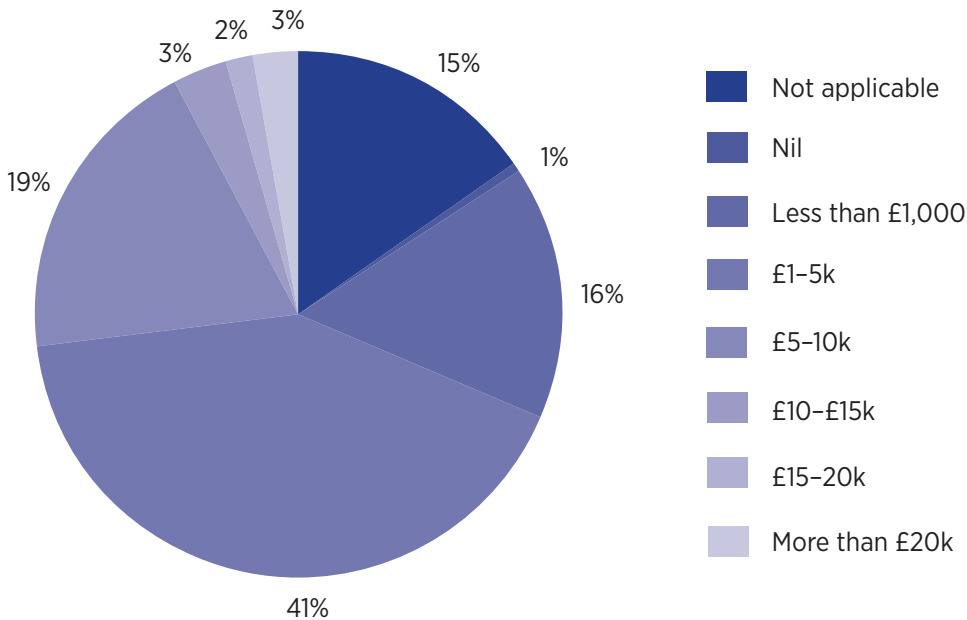


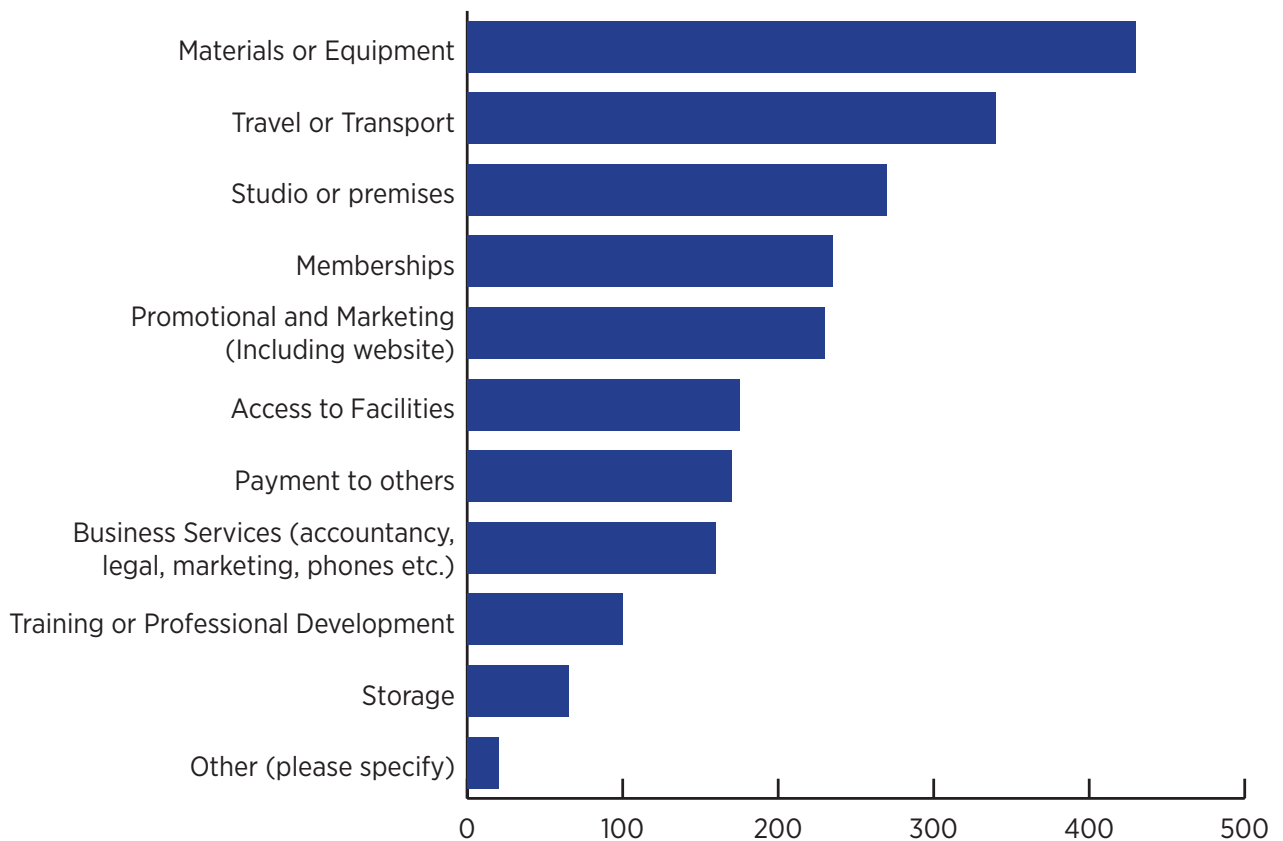
Figure 18 below shows how this expenditure most commonly breaks down, with Materials and Equipment registering as a universal expense (cited by 94% of the 437 respondents on this issue).

Travel or transport is another common expense, highlighted by 77% of the respondents, above Studio or premises which is a significant cost for 61% of the respondents.

Promotion and Marketing and Memberships are each picked out by more than half of the sample as common expenses.

Payment to Others is cited by 37% of the respondents, showing that the visual arts sector supports a variety of peer and ancillary services.

Figure 18: Respondents' annual operating expenditure (n437)



'Other' expenses recorded by respondents include Exhibition Fees, Licensee Fees, Application fees, Venue Hire and Childcare.

Indicators of financial vulnerability of workers in the sector

Welfare support

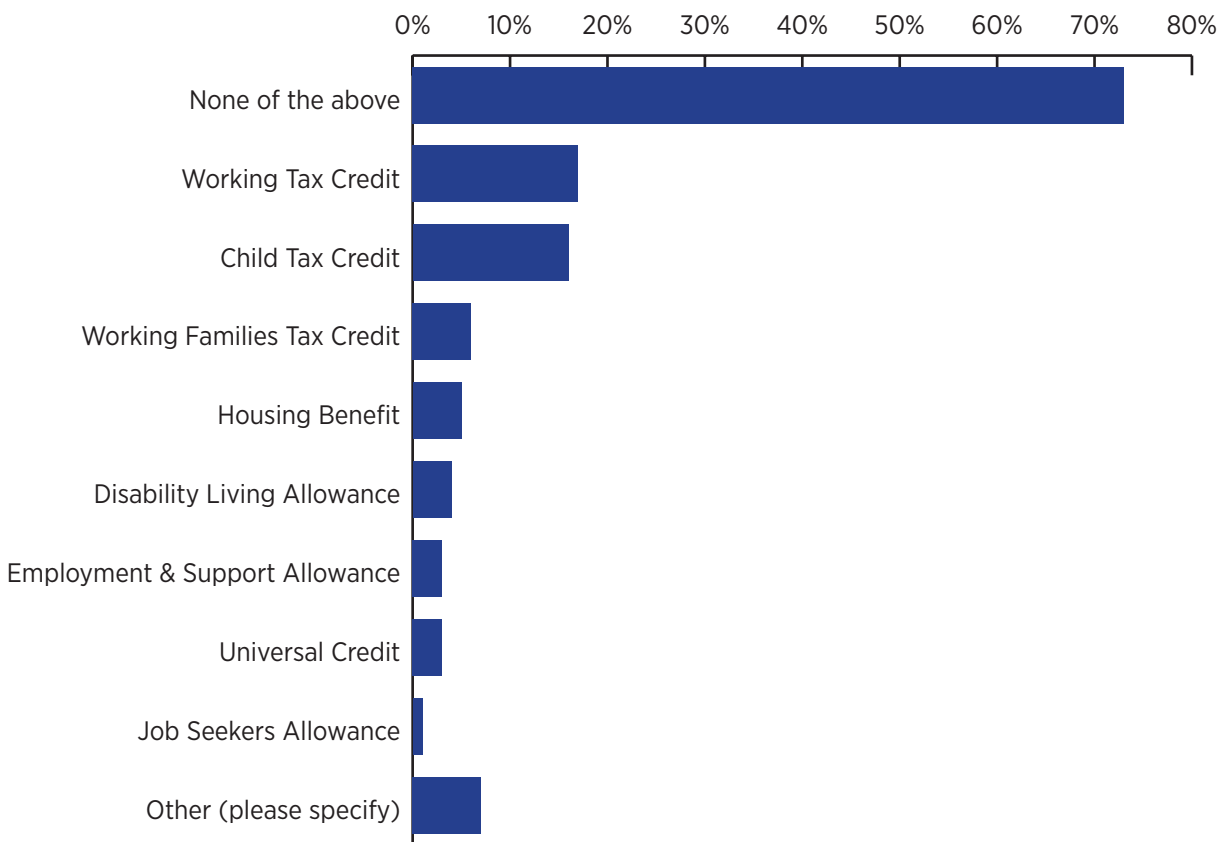
Respondents were asked if they receive any welfare support.

The majority (72%) of the 543 respondents on this issue report that they receive none of the welfare benefits listed below. Working Tax Credit and Child Tax Credit are the most common benefits accessed by the respondents in this survey, cited by 15% and 12% respectively.

A small proportion of respondents receive Working Families Tax Credit (5%) and Housing Benefit (4%). Only eight respondents (1.5%) record receipt of Employment and Support Allowance and four (0.7%) of Job Seekers Allowance.

Around 3% of the respondents receive Disability Living Allowance.

Figure 19: Levels of receipt of welfare benefits (n543)



'Other' benefits reported include State Pension (3% of the total respondents for this survey stated that they are retired), Carers Allowance, and Council Tax Benefit.

Pension arrangements

Only 42% of respondents have further pension provision arrangements in place beyond expectations of a statutory state

pension, 55% through an employer and 19% through independent schemes, and 14% through a combination.

Figure 20: Beyond a state pension, do respondents' have any further pension provision? (n610)

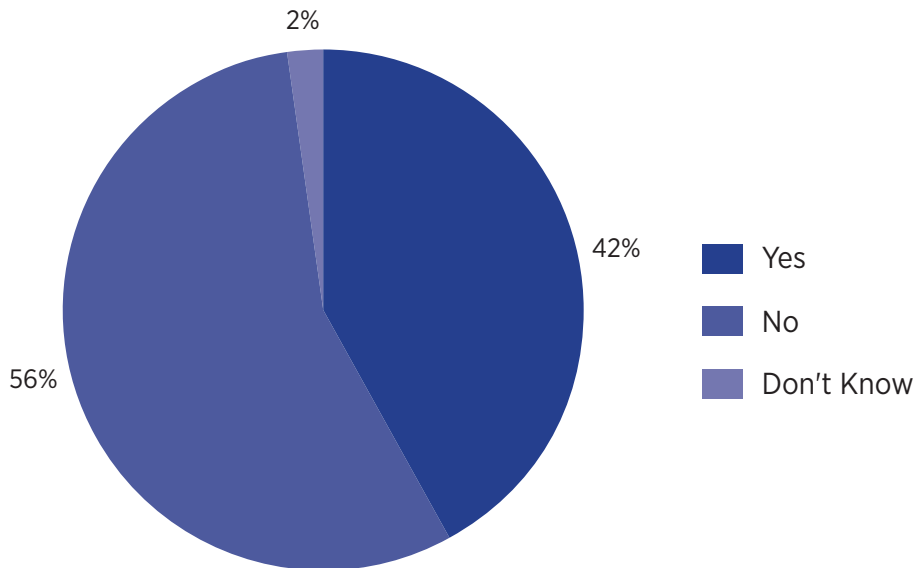
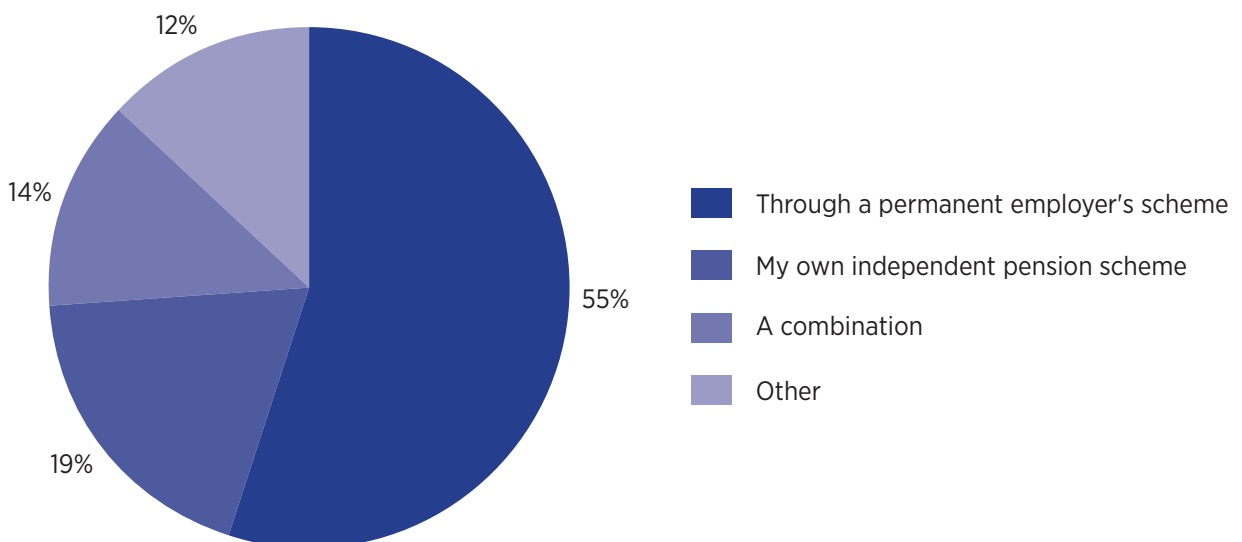


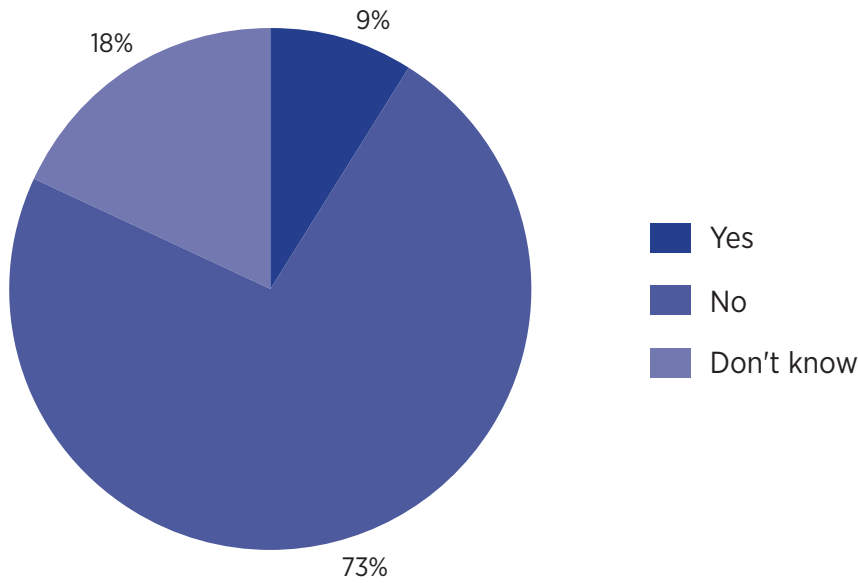
Figure 21: Those that had further pension provision (n276)



Only 9% of respondents who commented on pension provision (n601) are confident that any pensions they are entitled to will provide them with an adequate income when they

retire. The majority (73%) of respondents are not confident on this question, and a further 18% 'don't know' what their status will be.

Figure 22: Are respondents confident that any pension/s they are entitled to will provide an adequate income when they retire? (n601)



The non-permanent working conditions commonly experienced in the sector hinder people working in the visual arts from building up long-term, independent

pension provision. That a large proportion of the sector is self-employed (61% of the respondents in this survey) is also likely to be a contributing factor.



4. The Visual Arts Workforce in Scotland

According to statistics published by Creative & Cultural Skills for the UK:

- 95% of people working in the UK visual arts sector are white⁶
- 46% of the UK visual arts workforce are female and 54% are male⁷

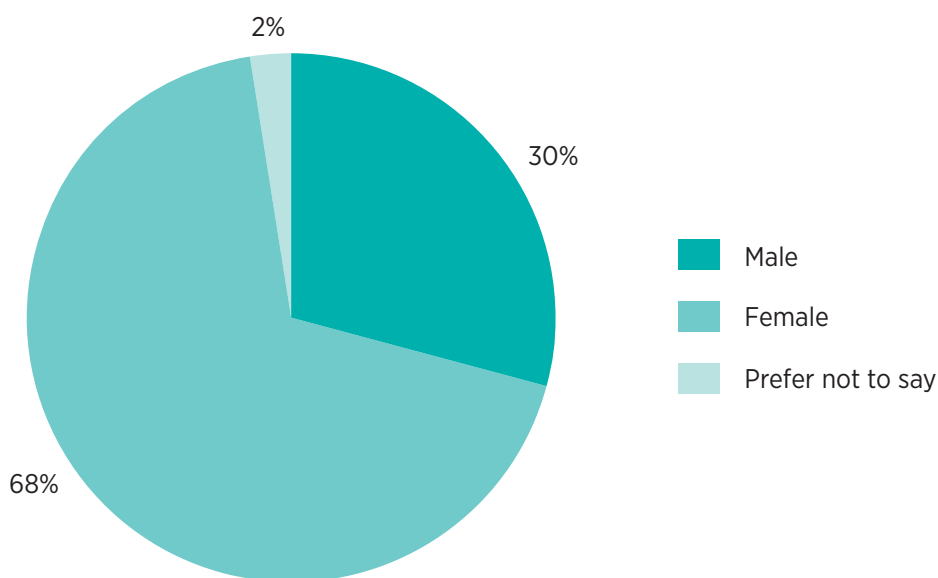
- People working in the sector tend to be highly qualified: 38% have first degrees and a further 19% have a postgraduate degree or diploma⁸

The respondents in this survey reflect the following profile for the visual arts sector in Scotland.

Gender

Just over two-thirds of the respondents in this survey are female, and just under one third are male.

Figure 23: Gender of respondents (n463)



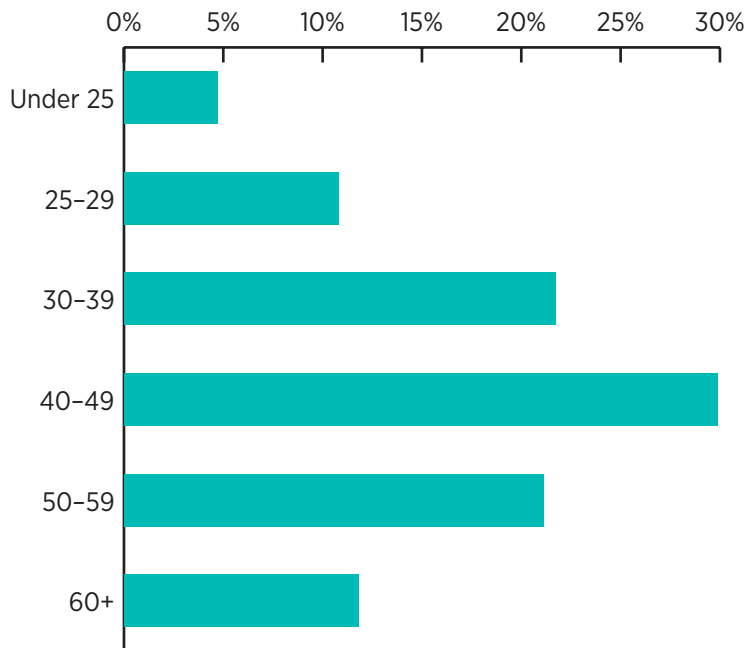
Age range in the sector

People of different ages and career stages are represented in this dataset. More than half of the respondents in this survey are aged between 30–49 (52%); a quarter (24%) is 50 years old or over, and 12% are aged under 30.

⁶ *Visual Arts Blueprint 2009 Creative & Cultural Skills*

⁷ *Visual Arts Statistics 2012–13 Creative & Cultural Skills*

⁸ *Visual Arts Blueprint 2009 Creative & Cultural Skills*

Figure 24: Age range of respondents in this survey (n465)

Ethnic diversity

The respondents in this survey reflect a visual arts sector that is predominantly White (a total of 92%), with the highest number of respondents identifying as *White Scottish* and *White Other British* (78% of total).

Other ethnic groups are represented in single digits, comprising less than 2% of the respondents. A proportion of respondents (4%) prefer not to state their ethnic background. 'Other' ethnic identities recorded by respondents are '*White Northern Irish*', '*White Italian*' and '*Jewish*'.

Figure 25: Ethnic background of respondents (n464)

Answer Options	Percent	Count
White Scottish	51.3%	238
White Other British	26.9%	125
White - other white ethnic group	9.7%	45
Prefer not to answer	3.9%	18
White Irish	3.4%	16
Other	2.4%	11
Mixed or multiple ethnic groups	0.6%	3
White Gypsy / Traveller	0.4%	2
Caribbean, Caribbean Scottish or Caribbean British	0.4%	2
Arab, Arab Scottish or Arab British	0.4%	2
White Polish	0.2%	1
Chinese, Chinese Scottish or Chinese British	0.2%	1
Pakistani, Pakistani Scottish or Pakistani British	0.0%	0
Indian, Indian Scottish or Indian British	0.0%	0
Bangladeshi, Bangladeshi Scottish or Bangladeshi British	0.0%	0
African, African Scottish or African British	0.0%	0
Black, Black Scottish or Black British	0.0%	0

Reasons for basing work or practice in Scotland

As indicated above, a large proportion of the respondents in this survey identify as other than 'White Scottish', including 30% identifying as *White Other British* and *White Irish* and a further 10% identifying as Other White Ethnic Groups which includes European nationalities.

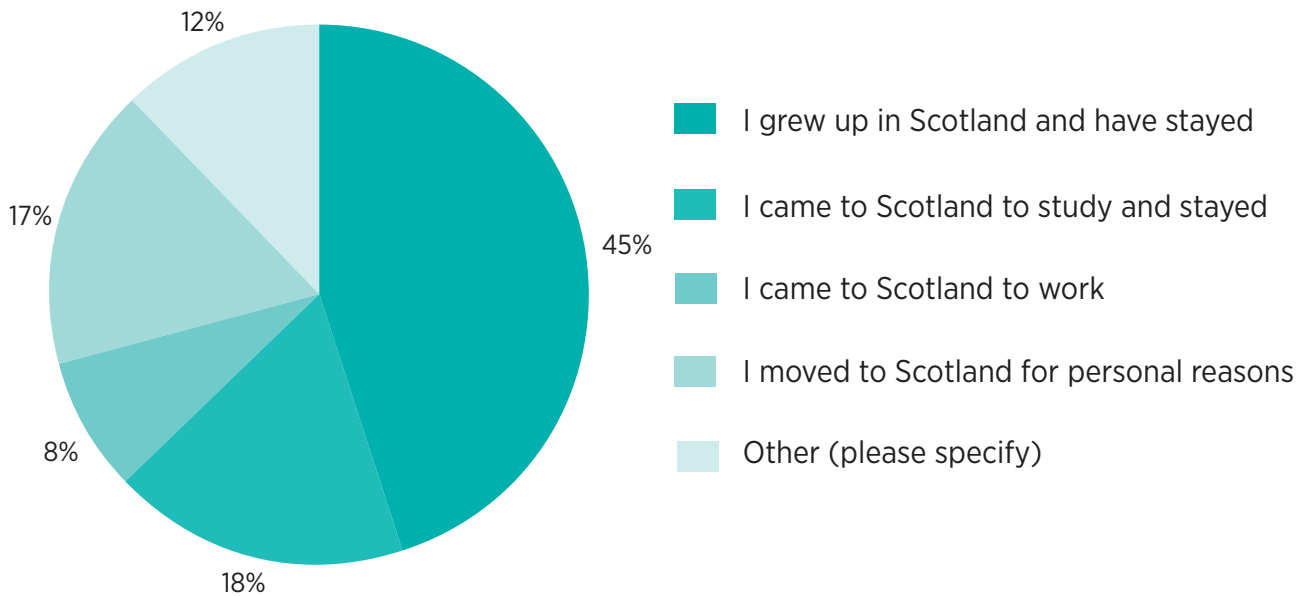
As a means to explore what attracts people to base their visual arts work in Scotland, respondents were asked which of the following statements best applies to their circumstances.

The largest group of respondents reported that they grew up in Scotland and have

remained working in the country (45%). Significant numbers among the respondents came to Scotland to study and stayed to work here, including their visual arts work (18%). A further 8% came to Scotland specifically for work, and 17% are located in Scotland for a variety of personal reasons.

An eighth of the sample (12%) cited other circumstances not listed below, commonly having grown up in Scotland, spent some time away then returned, or living only part of the time in Scotland.

Figure 26: Which of the following statements best applies to respondents (n669)



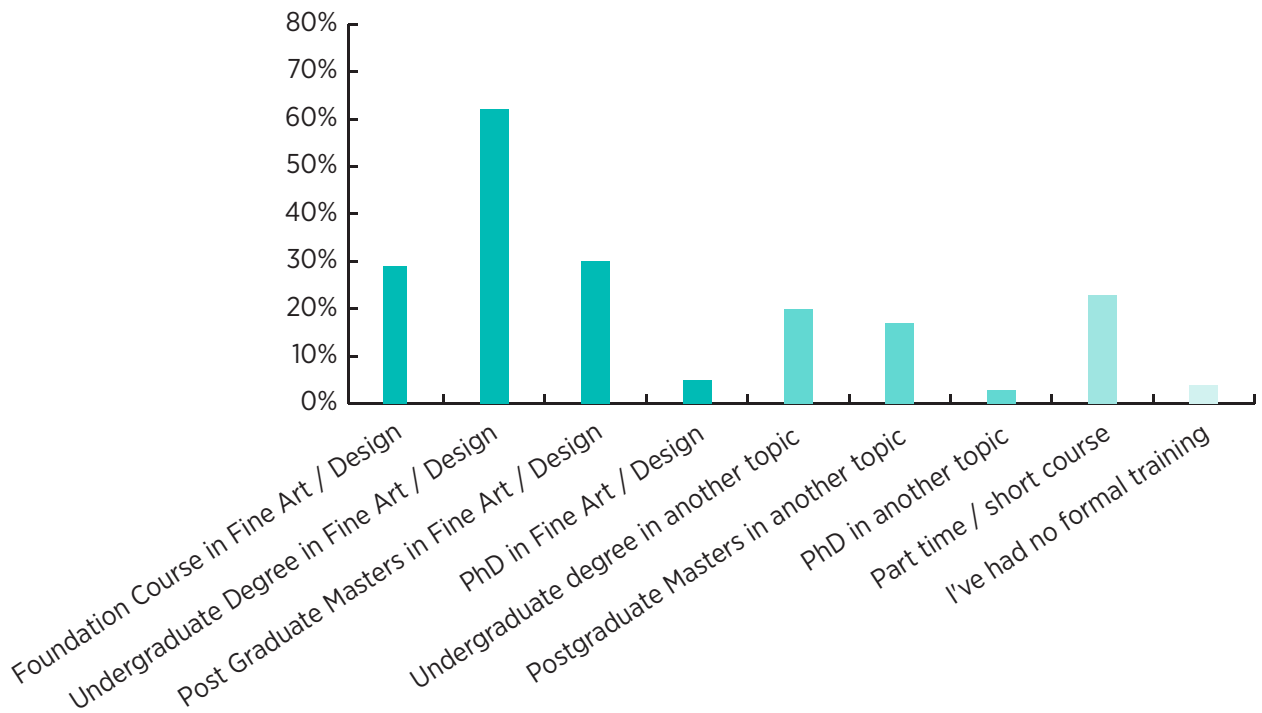
Training and education levels

The dataset for this survey reinforces existing evidence of a highly qualified visual arts sector. Only 5% of the 516 respondents on this issue reported having had no formal training.

Respondents were able to mark as many options as applied, showing how training and education ‘layers’ up in the sector.

- 30% of respondents have completed a Foundation Course in Fine Art/Design
- 63% have an Undergraduate Degree in Fine Art/Design and 19% have an undergraduate degree in another topic
- 31% of respondents have a Post-Graduate Masters in Fine Art/Design and 17% have a Post-Graduate Masters in another topic
- 5% of respondents achieved a PhD in Fine Art/Design and 4% are PhDs in another topic
- 24% of respondents have also studied part-time or undertaken short courses.

Figure 27: Respondents’ level of training or education (n516)





5. Development Support for the Sector

Useful professional development accessed by respondents

In the past five years respondents have undertaken the following professional development activities, presented in order of precedence:

Figure 28: Professional Development Activities undertaken by respondents in the last 5 years (n497)

Professional Development Activity	Number of Responses *	Cited by % of respondents (n497)
Collaborative Work	325	65
Research	314	63
Residencies	216	43
Skills Sharing	214	43
Technical/Creative Skills Training	200	40
Peer to Peer Mentoring	199	40
Business Skills Training	187	37
Visual Arts Sector Business Support	174	35
Training Course	171	34
Work Experience / Informal Apprenticeship	100	20
Internship	91	18
Leadership training	79	16
Formal apprenticeship	31	6

* Respondents had an option of saying that a category was *not applicable*: the figures presented here reflect the number of people who have accessed each activity.

Respondents also ranked these activities in terms of the impact and benefits they gained for their work: no benefit, limited benefit, some benefit, very beneficial, extremely beneficial. The results are shown in the diagram overleaf.

Research is seen as the most beneficial development activity, scoring very beneficial or extremely beneficial 263 times out of 314 responses, or 83% of the time. The next most beneficial activity is Residencies (81%

of responses deeming it very or extremely beneficial) and then Collaborative work (77%). Peer to Peer Mentoring and Skills Sharing are also ranked as highly beneficial (74% and 71% respectively).

In terms of low benefit, 16 out of 31 responses (52%) deemed Formal Apprenticeship of limited or no benefit. Leadership training also scored poorly, with 23 out of 79 responses (29%) ranking it of limited or no benefit.

Figure 29: Benefit of Professional Development Activities undertaken by respondents in the last 5 years (n497)

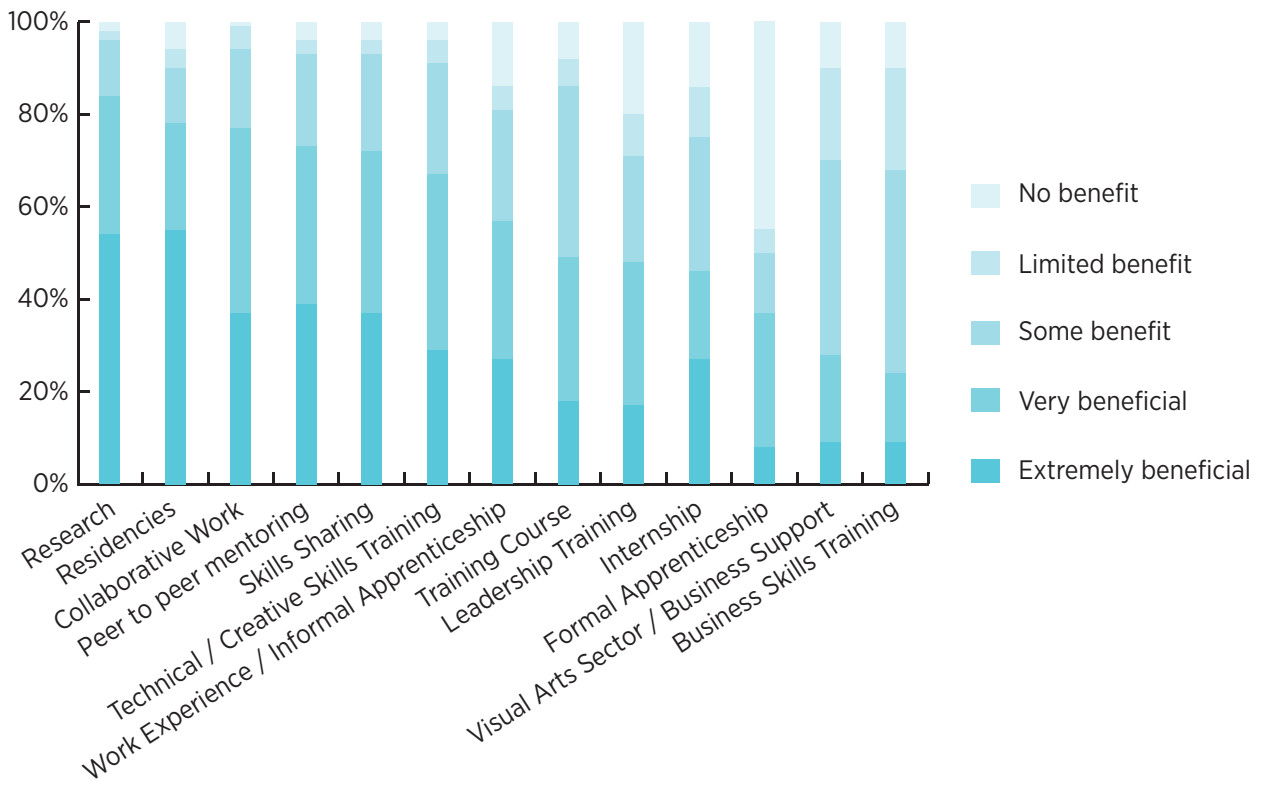
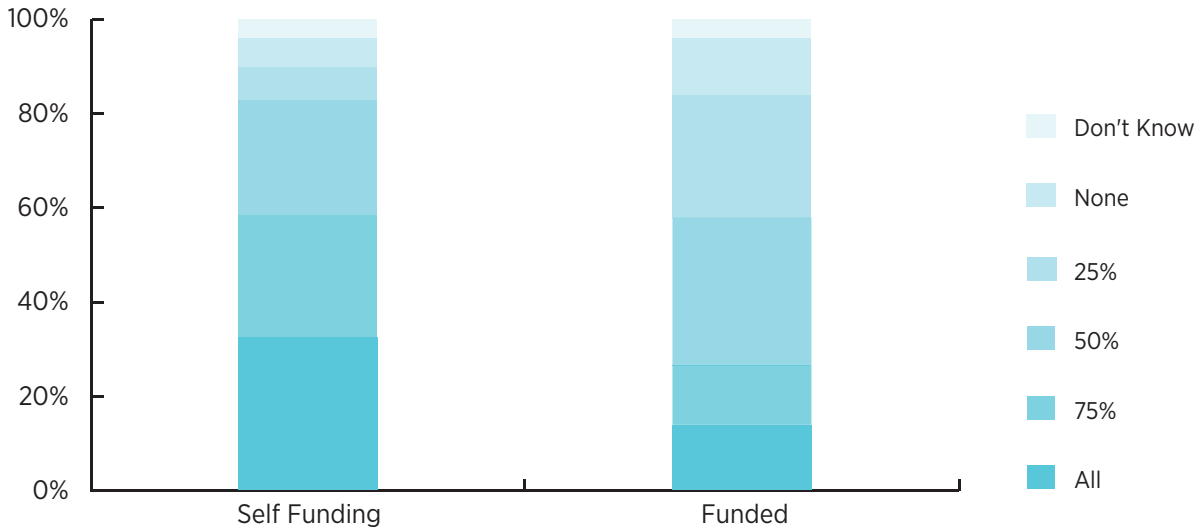


Figure 30: Data analysis on benefits and impact of Professional Development activities (n497)

Answer Options	No benefit	Limited benefit	Some benefit	Very beneficial	Extremely beneficial	Combined scores (very/extremely)	Actual response count (not including N/As)	% of Responses deemed very or extremely beneficial
Research	8	7	36	95	168	263	314	83
Residencies	10	6	25	57	118	175	216	81
Collaborative Work	5	12	59	130	119	249	325	77
Peer to peer mentoring	10	6	36	69	78	147	199	74
Skills Sharing	9	7	46	76	76	152	214	71
Technical / Creative Skills Training	8	10	51	74	57	131	200	65
Work Experience / Informal Apprenticeship	15	5	24	30	26	56	100	56
Training Course	13	10	64	54	30	84	171	49
Leadership Training	16	7	18	25	13	38	79	48
Internship	13	10	26	18	24	42	91	46
Formal Apprenticeship	14	2	4	9	2	11	31	35
Visual Arts Sector / Business Support	17	37	73	32	15	47	174	27
Business Skills Training	19	40	82	30	16	46	187	24

The data below shows that the majority of professional development activity in the sector is self-funded by respondents.

Figure 31: Proportion of activity funded and self-funded (n482)



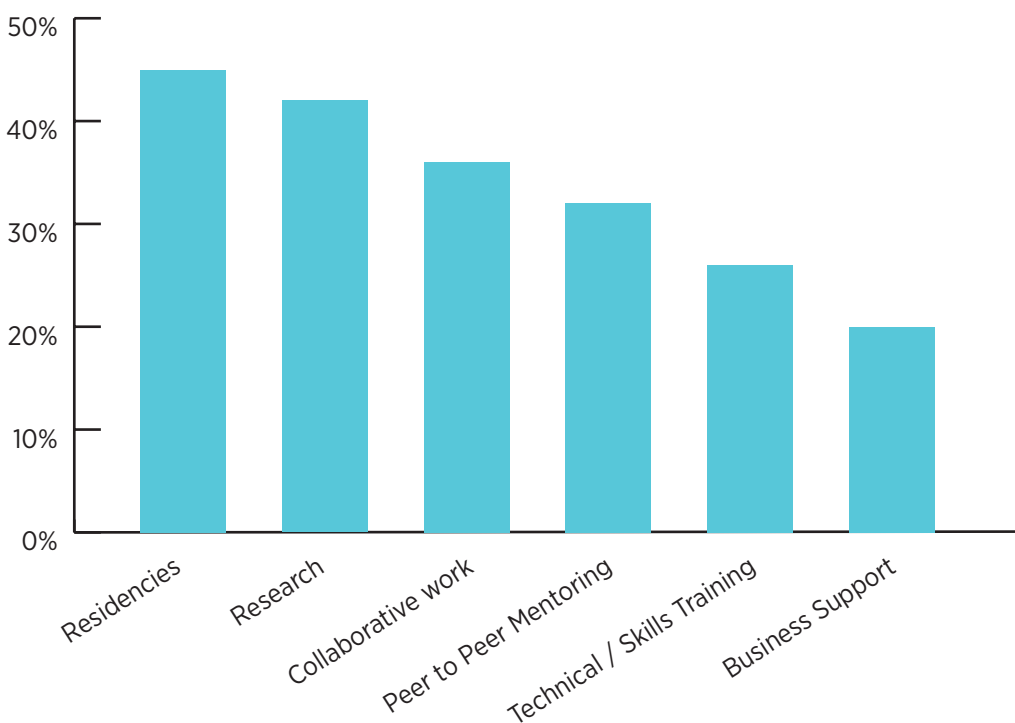
Most useful professional development support at present career stage

Respondents were asked to select three options from the list of professional development activities that they consider to be most helpful at their present career stage.

Overall, across all sector groups represented in the survey, respondents thought the

following most useful at the present point in their career: Residencies (45% of responses); Research (42%); Collaborative Work (36%); Peer to Peer Mentoring (32%); Technical and Creative Skills Training (26%) and Business Support (20%).

Figure 32: Most useful professional development support at this time, by % of respondents (n515)



Other activities were ranked as follows:

- Business skills training (19%)
- Leadership training (18%)
- Skills sharing (15%)
- Training course (9%)
- Work experience / informal apprenticeship (5%)
- Internship (4%)
- Formal apprenticeship (3%)

And 8% thought that *none of the above* would be helpful at this point in their career.

Key professional development priorities by career stage

To contextualise the professional needs of the sector at particular stages, it is useful to extrapolate findings for groups of respondents considered at early, mid and

advanced career stages. To do this, data has been collated for those who state that they have been working in the sector for:

0-5 years – ‘early’ career

6-15 years – ‘mid’ career

16 years+ – ‘advanced’ career

Figure 33: Most useful professional development support at this time, by career stage and % of respondents

	Early Career % (n145)	Mid Career % (n208)	Advanced Career % (n166)
Residencies	50	47	38
Research	37	47	41
Collaborative Work	39	39	31
Peer to Peer Mentoring	34	34	27
Technical / Creative Skills Training	29	26	25
Business Support	22	21	18
Business Skills Training	21	24	11
Leadership Training	15	20	18
Skills Sharing	20	16	10
Other (please specify)	9	9	10
Training Course	10	9	8
None of the above	3	6	14
Work Experience / Informal Apprenticeship	10	4	2
Internship	7	4	2
Formal Apprenticeship	6	2	1

Professional development priorities for early career respondents

People who are less than five years into their career in the visual arts value Residencies above all other activities compared with people at more advanced career stages.

Peer to Peer Mentoring also stands out as a priority activity for this group (favoured by a larger proportion of early and mid-career respondents than those more advanced in their careers).

Collaborative Work seems an equal priority for early and mid-career respondents, 39% of both groups selecting this option.

Understandably, Formal apprenticeships, Internships and Work experience / informal apprenticeships are all more important for early career respondents than the mid and advanced career groups, though they score below 10% in terms of selection frequency.

Additional comments provided by this group include 'funding or stable paid work', 'links to museums/curators/public art', 'a public commission', and '[activities] to help me promote myself and expand'.

Professional development priorities for mid-career respondents

As the chart below demonstrates, for respondents 6-15 years into their careers in the visual arts there are a number of priorities that seem markedly more important to this group than those early and advanced in their careers:

- Collaborative work
- Research
- Business skills training
- Technical / creative skills training
- Leadership training

Residencies are also strongly valued by this group.

Professional development priorities for advanced career respondents

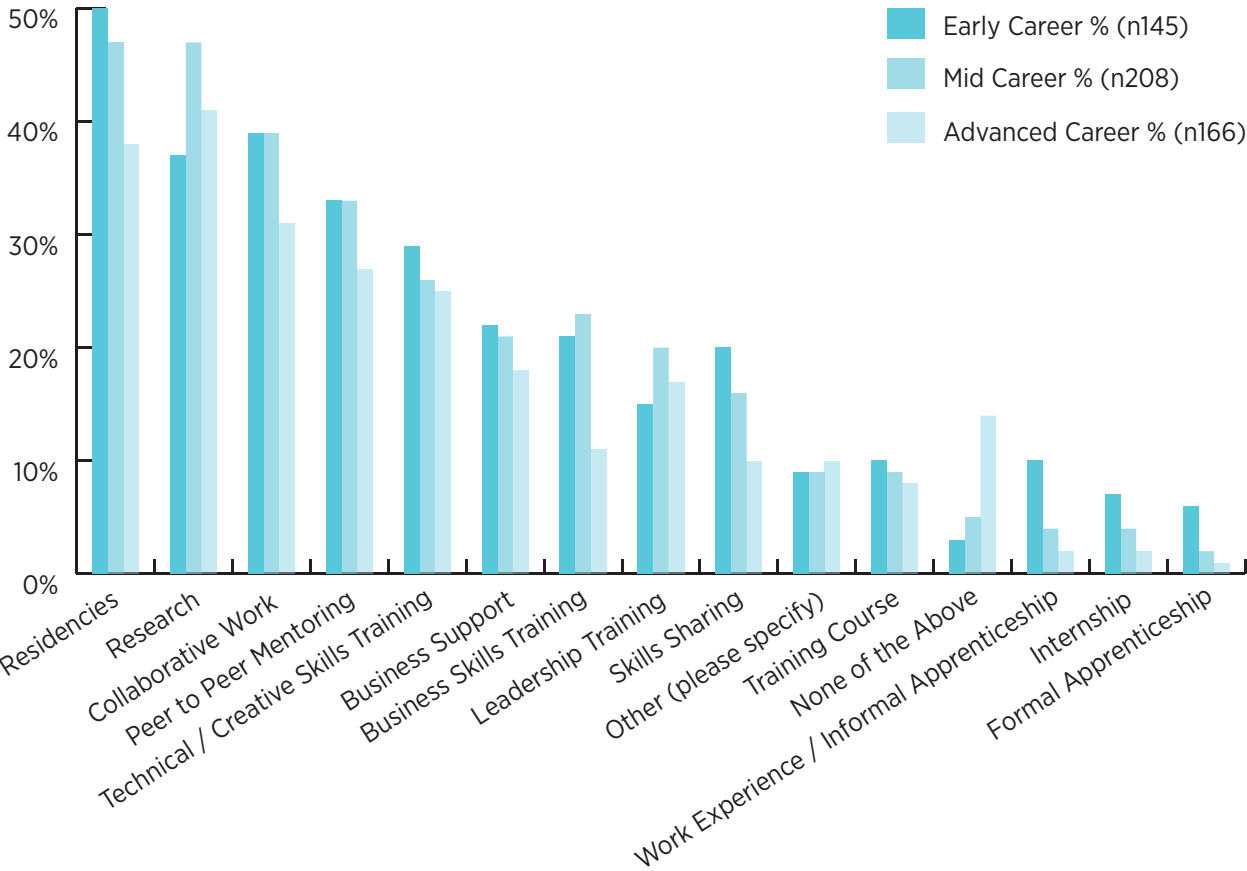
As can be seen below, respondents who have been working in the sector for 16 or more years (half of whom have been working for more than 25 years), do not favour any activity more than those early and midway in their careers, though the following professional development activities are clear priorities for this group:

In order of preference

- Research
- Residencies
- Collaborative work
- Peer to peer mentoring
- Technical/creative skills training.

Additional comments provided by this group include 'further study', 'sales development' and 'use of social media', 'spin off business development' and '[opportunities] to shift into another area [like] creative writing'.

Figure 34: Professional development priorities for respondents at early, mid and advanced career stages



The most important enabling factor in my career:

Insights from **early career respondents**

Of the 195 respondents who stated that they had been working in the sector for 0–5 years, 109 provided insights on the most important factor that has enabled them to develop their work in the sector:

Funding

“Funding support”

Creative Scotland

“Etsy and Creative Scotland”

Opportunities

“So far I would say residency, studio space and practice in writing proposals.”

Getting opportunities, right after I graduated, gave me the exposure and support I needed to continue

“Opportunities offered by community art organisations”

“Many venues have provided me with in-kind grants for use of space - as in- I have not had to pay to curate and host exhibitions.”

My qualifications

“Hard work and internship”

Generous, inclusive arts networks

“Business skills learnt from the cultural enterprises office in Edinburgh”

Community

“There is more enthusiasm for original art in Scotland than elsewhere in the UK”

A DIY culture of making stuff happen

“Support from Peers”

Having a supportive family and network around me

“Academic contacts”

“Collaborative practice: a willingness and commitment to share resources, skills, ideas and physical space”

“Supportive network of professionals”

“Peer group and guidance from local institutions and informal ‘mentoring’”

Family/ individual

“Creative freedom and having savings”

Self belief and an uninspiring paid job

My own networking skills and perseverance

The most important enabling factor in my career:

Insights from **mid-career respondents**

(from a total of 168 personal responses)

Funding

“Creative Scotland artists bursaries enabling me to really challenge and develop my practice without any pre-determined outcome”

Access to resources - technical facilities and research centres

Opportunities

Residency”

Funded residency and part-time art courses

“Funding and support from academic institutions, without that I would not be able to continue to work in the visual arts”

“Opportunities and funding early in my career, which allowed me to capitalise on them”

“Internship which led to a job”

“A paid internship that I was awarded early in my career. This allowed an insight into the ways in which institutions in Scotland worked.”

“Attending biennale and international art events”

Community

“Getting involved in an artist-led organisation”

A DIY culture of making stuff happen

“The vivid art scene in Glasgow”

“Supportive studio facilities and peer support”

“The most important factor has been meeting people through training and mentoring schemes (that have been mainly voluntary when I was a recent graduate)”

“Low cost, communal studio space and peer networks”

“Friendships and social networks”

Family/ individual

“Partner encouragement and paying most of domestic bills”

Staying connected nationally

“My own talent”

“Support from my organisation”

“Time (post paid work) and ability”

“Determination and the need to make art”

“Private collectors buying my work and therefor enabling me to finance more critical contemporary art projects.”

The most important enabling factor in my career:

Insights from **advanced career respondents**

(from a total of 142 personal responses)

Funding

“Support from Creative Scotland over the duration of my career”

Arts Council Funding in the early years

“Research funding”

Support given to me as a young artist

“Tax Credits. I could not have continued working in the last 15 years without the additional help toward childcare costs. Without childcare I could not have worked.”

“Local authority support”

“Receiving support from Creative Scotland financially and emotionally”

“The Own Art scheme”

Opportunities

“Access to a studio.”

Having my own money to go on courses

Early involvement with festivals and performance art in Scotland which opened up new possibilities for work.

Community

“Peer encouragement”

Vibrant visual arts culture in Scotland

“Networks”

“Partnership working”

“The generosity and social interconnectedness of the visual arts community”

“The quality of work produced in Scotland, it’s size and having a subsidised studio for the first years of my career”

Family/ individual

“Personal resilience and determination”

A wide skill set which has allowed me to earn money in parallel industries to sustain

“Part-time flexible employment”

“Financial support from family”

“Belief and interest in visual arts and their value”

“Self determination, self belief and support from my spouse”

“Members of the public buying [the work]”



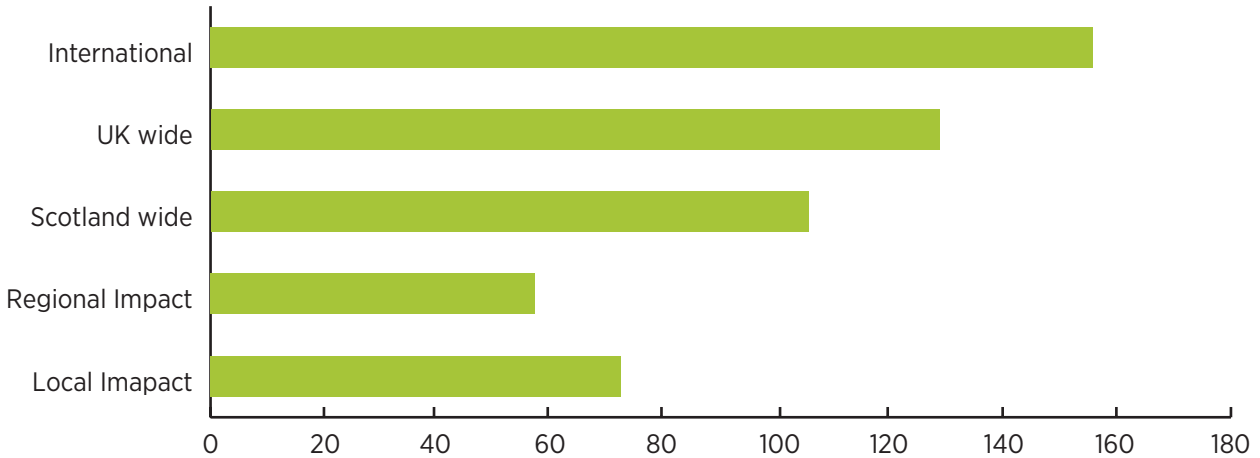
6. Engaging People with the Visual Arts

Reach of respondents' work

When asked to define the reach of their work in one of the following categories, more than half of the 515 people who answered this question indicated a reach beyond Scotland, either UK-wide (25%) or internationally (30%).

Around a fifth of the respondents describe their work as having a Scotland-wide impact. The remaining quarter identified their work at a more localised level, as having regional impact (11%) or local impact (14%).

Figure 35: How respondents describe the overall reach of the work that they are involved in (n515)



For the 156 respondents working internationally, the biggest focus was the USA, Canada, Germany, France and Italy. A more than 50 countries were listed across

Europe, North America, Asia, South America, the Indian Sub-Continent, Australasia and Africa, demonstrating a truly global reach. Specifically:

Africa	Ethiopia, Mozambique, Nigeria, South Africa, Zambia
Asia and India	China, Hong Kong, India, Japan, Korea, Singapore, Sri Lanka, Taiwan
Central and South America	Argentina, Barbados, Brazil, Chile, Peru, Puerto Rico, Venezuela
Middle and Near East	Azerbaijan, Qatar, United Arab Emirates
Europe	Austria, Belgium, Cyprus, Denmark, Faroe Islands, Finland, France, Greece, Germany, Hungary, Iceland, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Spain, Sweden, Switzerland, Turkey
Australasia	Australia, New Zealand
North America	United States of America, Canada, Mexico

Priority audiences for respondents

On the understanding that most artists and professionals would like their work to reach the widest range and largest number of people, respondents were asked to indicate, beyond a general audience, if they had any specific groups of people they would like their work to be seen by. These were ranked

in order of importance with '1' being most important.

Priority and specific audiences engaged by respondents were ranked as follows across the whole group of 494 people who provided information on this issue.

In order of importance

#1 Peers/Other Artists /Arts Professionals	selected by 402 respondents, 46% of whom ranked them as 1 or 2
#2 Local / Geographic Communities	selected by 337 respondents, 37% of whom ranked them 1 or 2
#3 International Audiences	selected by 351 respondents, 23% of whom ranked them 1 or 2
#4 Buyers	selected by 319 respondents, 33% of whom ranked them 1
#5 Collectors	selected by 312 respondents, 36% of whom ranked them 1 or 2
#6 Academics	selected by 298 respondents, 35% of whom ranked them 1, 2 or 3
#7 Press and Media	selected by 357 respondents, 25% of whom ranked this 1, 2 or 3
#8 Culturally Diverse Communities	selected by 254 respondents, 32% of whom ranked these 1, 2 or 3
#9 Schools or Formal Education / Harder to Reach Communities or Groups	selected by 278 respondents, 26% of whom ranked this 1, 2 or 3
#10 Health and Social Care Communities	selected by 209 respondents, 17% of whom ranked these 1, 2 or 3

Figure 36: Priority and specific audiences ranked in importance by respondents, where 1 is most important. Presented by Average rating (n494)



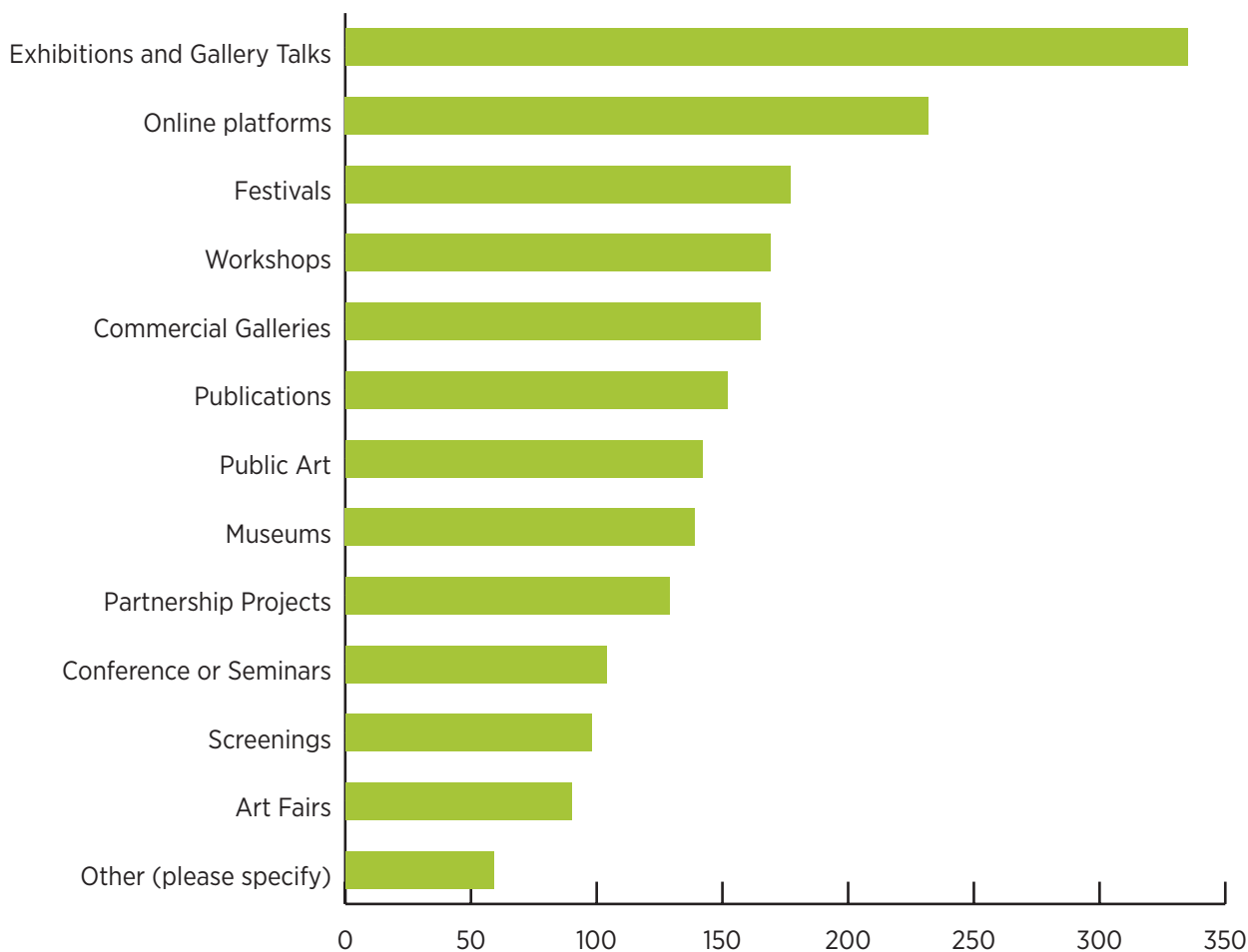
(Note: the lower the average rating, the greater the importance to respondents)

Main channels for work

The main channels for respondents' work are depicted below. *Exhibitions and Gallery Talks* emerge as a significant channel for the majority of the 511 people who responded on this issue. *Online platforms* rank second in importance to respondents, followed by Festivals, Workshops, and Commercial Galleries all of which are relevant to around a third of the respondent group.

Other common channels highlighted by individual respondents in their comments include *open studio events*, *word of mouth* and *activities associated with a local authority gallery or community organisation*.

Figure 37: What are the main distribution channels for your work?



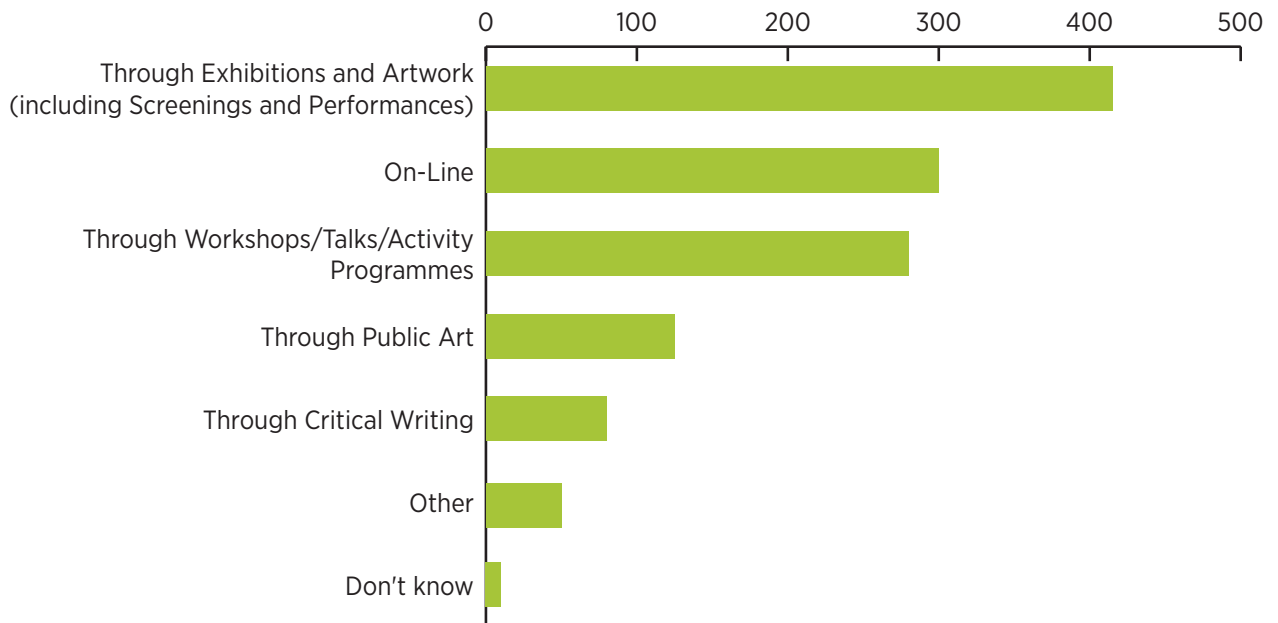
Most effective means of public engagement

Respondents were asked to list what they see as the most effective ways in which the public has engaged or become involved with their visual arts work during the last 5 years.

Based on 508 responses, top of the list is *Through Exhibitions and Artwork (including*

screenings and performances), selected by 83% of the respondent group. The other most significant forms of engagement occur *Online* and through *Workshops/Talks/Activity programmes*.

Figure 38: Over the last 5 years, what have been the most effective ways for the public to get involved or engage with your visual arts work?



Other means of public engagement highlighted by respondents as effective include *socially engaged projects*, through *Festivals* and *Open studio events*.

Use of social media and online platforms

People working in the visual arts sector use a range of online platforms including social media in their work, and to promote and disseminate their work. Respondents were asked to rank these in order of their effectiveness.

In order of precedence, the most effective social media and online platforms used by the respondents in this survey are:

- Respondents' own websites
- Respondents' own Facebook profiles
- Venue or agency-controlled Facebook
- Twitter
- Instagram
- Linked In
- Blog (respondent's own or others')
- Vimeo
- Youtube
- Tumblr.

Another direction of possible interest to view this issue is via the number of respondents

who deem certain social media and online platforms 'not applicable' in their work. Figure 39 below shows the percentage of the dataset who don't engage with these tools in a professional context.

Figure 39: Social media and websites used by respondents (n505)

Percentage of respondent group stating 'not applicable (N/A)'	
My own website	12%
My own Facebook profile	15%
Twitter	16%
Venue or Agency controlled Facebook	28%
Linked In	28%
Blog (your own or others')	28%
Vimeo	32%
Instagram	36%
Google+	38%
Youtube	38%
Pinterest	41%
Tumblr	42%
Flickr	45%



7.
**How the Sector
Interconnects and
Functions**

Contexts in which people work

The respondents in the survey work in a range of context and settings, as shown in the Table below. The most common contexts identified in this survey are:

- Commercial Galleries (49% of respondents)

- Artist-led spaces (44%)
- Arts and Heritage Organisations (38%).

Festivals, Commercial Galleries and Studio/workshop provision are also significant (each around 30% of the sample).

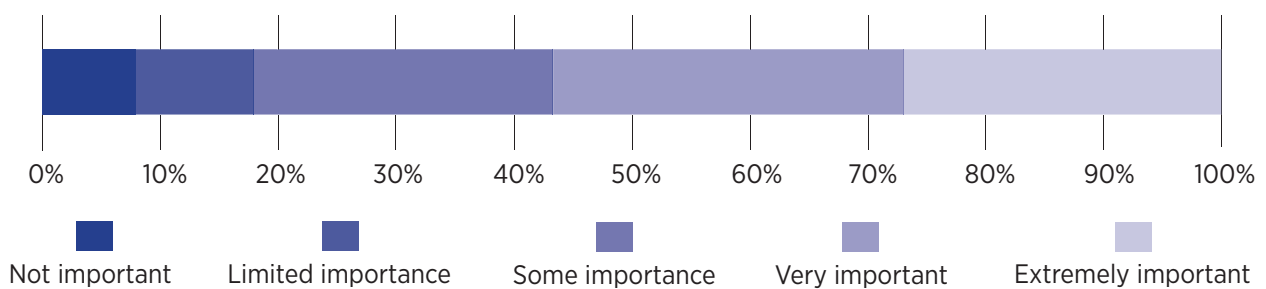
Importance of partnership working

Respondents were asked to indicate how important partnership working or collaboration is in their visual arts work. On a scale where 5 is highest and 1 is lowest, the overall score averaged across all respondents (n487) is 3.58.

A total of 85 people (17% of the sample) stated that partnership or collaborative working is of no or limited importance in their work.

The majority of respondents (56%) rated it as very or extremely important.

Figure 40: How important to you is working in partnership or collaboration?



A sense of the sector ecology

This report offers initial analysis of the dataset which is rich in detail and may be separated out into discreet data strands to enable deeper insights into the specificities of different parts of the sector. The scale of the dataset, together with the range of 'identifiers' built into the survey, offers the potential for further analysis. In addition the surveys have collected substantial qualitative data with significant scope for content analysis beyond the capacity of this report.

Within the scope of this overview report, important connections and support structures have been reported for common grouped roles in the sector; for Artists, for Curators, Gallerists, Producers and Directors and for Workshop facilitators or tutors and learning specialists.

Important connections for Artists

- The most important connections recorded by Artists are (in order of importance): *other Artists, Curators, Gallerists, Academics or Lecturers, Workshop Facilitators or Tutors and Technicians.*

- The most important organisations and services for Artists, in order of importance, are: Artist-led spaces, Publicly-funded Galleries, Commercial galleries, Residency centres, Festivals, Studio/Workshop providers and Third sector/community focussed organisations.

Important connections for Curators, Gallerists, Producers and Directors

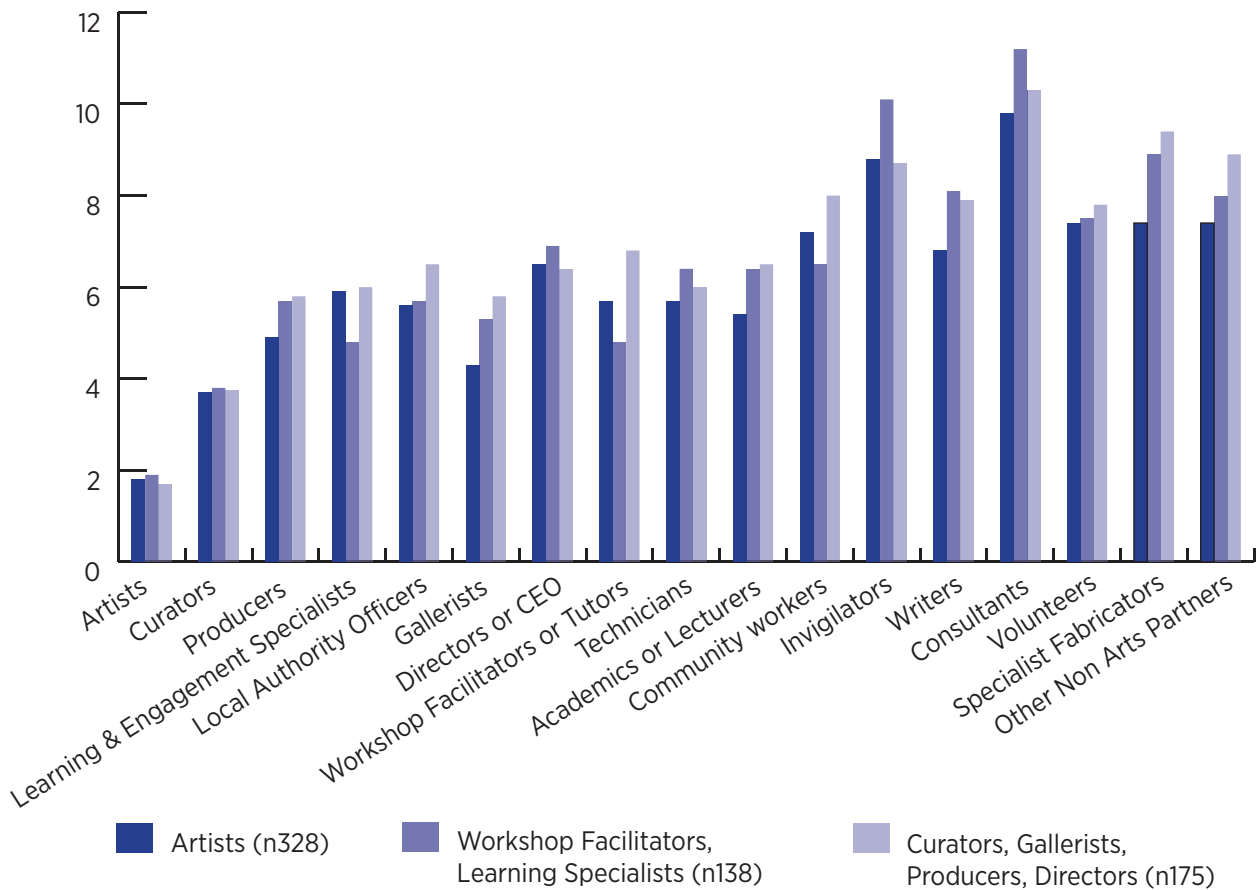
- The most important connections for curators, gallerists, producers and directors, in order of importance, are: artists, curators, producers, gallerists, technicians, learning and engagement specialists, directors or CEOs, and local authority officers
- The most important organisations and services for curators, gallerists, producers and directors, in order of importance, are: artist-led spaces, publicly funded galleries, festivals, arts & heritage organisations, residency centres and commercial galleries.

Important connections for Workshop facilitators and Learning specialists

- The most important connections for workshop facilitators or tutors, and learning and engagement specialists, in order of importance, are: artists, curators, learning and engagement specialists, workshop facilitators or tutors, gallerists, producers and local authority officers
- The most important organisations and services for workshop facilitators or tutors, and learning and engagement specialists, in order of importance, are: artist-led spaces, publicly funded galleries, arts & heritage organisations, residency centres, commercial galleries, third sector/ community focussed organisations, festivals, and studios/workshop providers.

Variations between the three groups

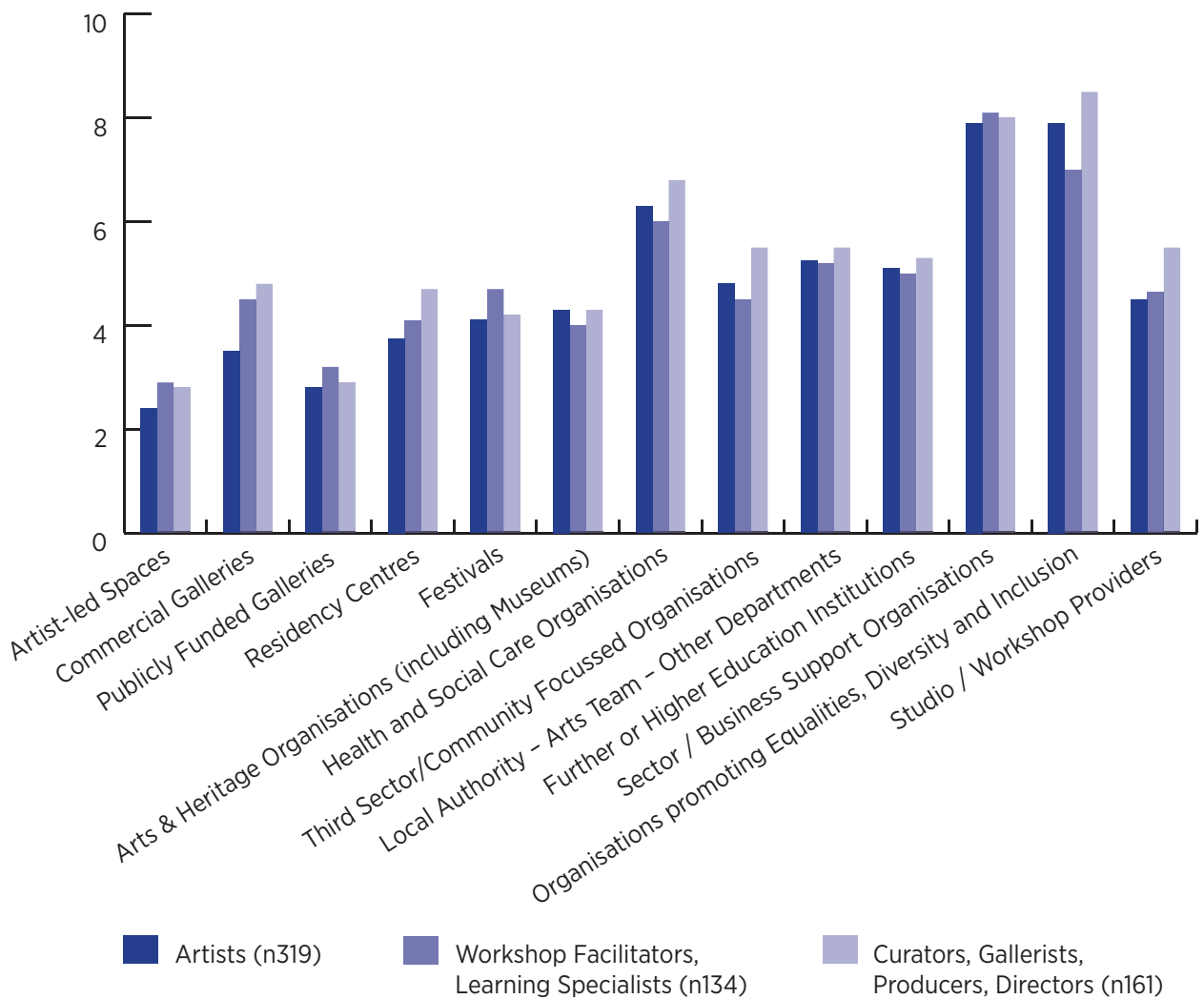
Figure 41: Most important connections, by sector group (lowest score equals highest importance)



This chart shows that there is minimal variation between how the different professions presented here value key connections in the sector. Artists and curators are the most important for all three groups, closely followed by gallerists. It can be seen that, across the board, all types of connection are more important to artists than other professions.

Community workers are slightly more important to workshop facilitators and learning specialists, as are workshop facilitators or tutors and learning and engagement specialists.

Figure 42: Most important organisations and services, by sector group
(lowest score equals highest importance)



As before, there are minimal grades of variation between the sector groups profiled here. *Artist-led spaces* and *Publicly-funded galleries* are the important features in the visual arts landscape for each of the groups, with *Festivals* and *Arts & Heritage organisations* also consistently valued.

Residency centres and *Commercial galleries* are also ranked highly by all groups.

The top five organisations and services appear to be slightly more important to Artists than to the other groups.

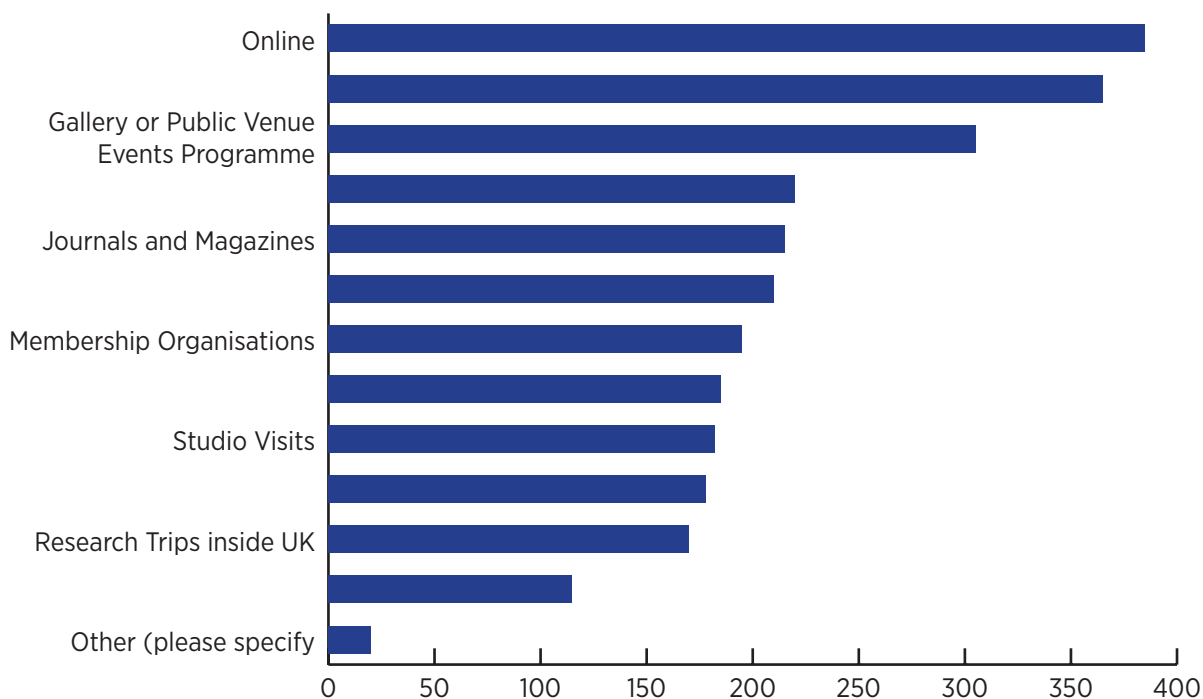
Value and usage of networks

The most effective means of finding out what is happening in the sector and sharing good practice in respondents' fields are:

In order of effectiveness

- Online (cited by 78% of respondents)
- Informal peer to peer communication (74%)
- Gallery or public venue events (61%).

Figure 43: What are the most effective means for you to find out about what is happening in the sector or share good practice in your field?



One in four respondents: use networks and membership organisations to keep up with sector developments and practice (44%); get information from journals and magazines (43%); and attend conferences and seminars (42%).

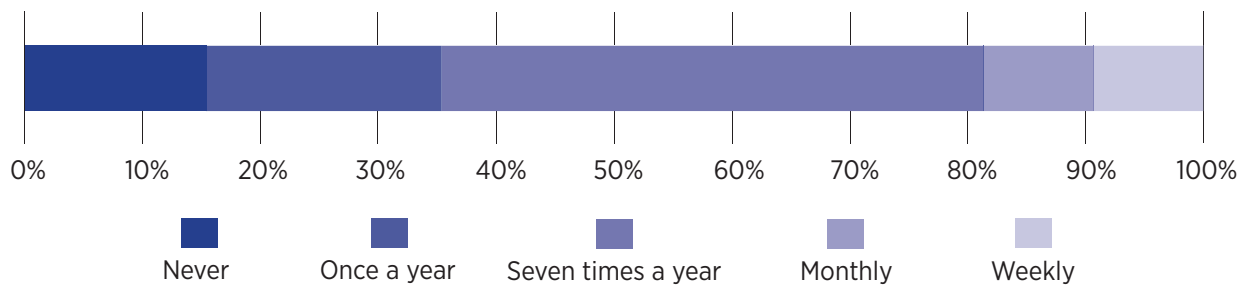
One in three respondents: value research trips outside the UK (35%), artist collectives (34%) and studio visits (34%) as effective ways of sharing good practice and keeping abreast of sector developments.

Engagement with formal networks

Although networks and membership organisations are ranked relatively low by respondents as effective platforms for sharing, the data below shows that people working in the sector engage strongly with them.

All but 13% of the respondents who provided information on this issue engage at least *annually* with formal networks or membership organisations, with 9% respondents engaging *weekly* and the same proportion again engaging on a *monthly* basis. Almost half of respondents (48%) engage *several times a year*.

Figure 44: How often respondents engage with formal networks or membership organisations (n482)

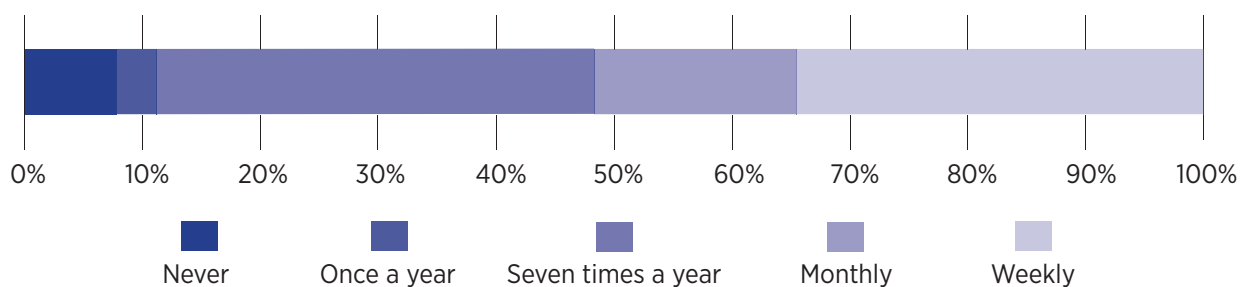


Engagement with informal networks

Respondents engage far more frequently with their informal networks (consistent with the high ranking of *Informal Peer to Peer* communication as a popular way to stay connected).

The results show that a third of respondents (33%) engage *weekly* with their informal networks, and another 18% engage *monthly*. A total of 38% respondents connects *several times a year* with informal networks, with only 3% engaging once a year and 8% never.

Figure 45: How often respondents engage with informal networks (n481)





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