

Arts Council of Northern Ireland

# Evidencing Need

**A report on the collated evidence  
making the case for an arts & culture  
Sectoral Survival Fund for Individual  
Artists.**

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## Thank you

This report could not have been completed without the valuable contribution and participation of individual artists and creative practitioners in our professional research efforts from March 2020 to July 2021.

We express our gratitude for each and every individual who took the time to take part in these valuable studies.

# Executive Summary

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## **The Creative Industries**

The Creative Industries is one of the fastest growing sectors; in 2018 it was worth £1.2bn to the NI economy and employed 29,000 people.

This is a strategically important sector to support, as demonstrated in the Programme for Government and its vision of improving wellbeing for all, and mentioned specifically in outcome 5: 'We are an innovative, creative society where people can fulfil their potential'. However the Creative Industries provide a broader contribution towards the economy, including their contribution towards tourism.

## **Impact on Artists**

The COVID-19 pandemic has had a severe impact on the ability for artists to create work, generate income, and maintain their career within the sector. The Arts Council (ACNI) has been involved in a collaborative effort to collate evidence to make the case for further financial support for individual artists across the broader creative industries. Individual artists not only create their own work, but act as freelancers and performers within arts organisations and the wider arts ecosystem.

The arts sector was the first to close, and has been one of the last to open; with performance spaces and venues having significant challenges and uncertainty around social distancing and safety precautions. There is concern about how this will have affected the sector in the long term; from audiences returning to financial viability of performances and arts events.

The Arts Council's annual funding survey of 97 organisations gives a useful insight into the nature of the sector. For every one permanent staff member, there are six contracted. Freelancers, volunteers and self-employed creative professionals are the life blood of the sector.

Artists spend years learning and honing their skills, and have higher levels of formal education than the rest of those economically active in NI, and there is a clear need to support individuals to protect these sectoral skills.

## **How ACNI is working with Department for Communities (DfC)**

ACNI has been working with DfC and the ministerial cultural recovery task force with the aims to:

- Demonstrate the need to support individual creative practitioners;
- Provide a short interim summary into the impacts of previous emergency grants;
- Review the distribution of previous grants for individuals to inform future; emergency programme development and provide a rationale for an urgent sectoral support fund for artists;
- Review UK wide evidence of COVID-19 impacts.

## **ACNI Research Findings**

ACNI has ran a programme of research and evaluation throughout the COVID-19 pandemic since it began in March 2020 with the most recent survey undertaken in May 2021. This research sought to evaluate emergency funding programmes to demonstrate the impact of awards, evidences loss of income, financial insecurity, recognise future uncertainty and demonstrate the need to protect careers in the sector. High level findings of this survey include:

- Three quarters of respondents lost more than half of their income during the pandemic;
- 9 in 10 respondents felt the Emergency grant protected their career in the creative industries;

- 7 in 10 respondents are still trading as a creative practitioner, with over a third stating that, without the grant, they would have ceased to trade;
- The previous grant assisted immediate financial stress; however, over one third are still uncertain about their future and only half have stated that the grant has strengthened their medium/long term financial security.

In addition to the quantitative findings, the survey evaluation also captured how COVID-19 has affected artists on a personal level. Analysis of this qualitative information has identified some common themes:

- Continued financial stress will lead to creatives leaving the sector;
- The ability for career development/progression and ability to create new material has been significantly hampered by restrictions, closures and limited financial support. This is more acute for artists living in the top 20% deprived areas;
- People have been forced to find alternative means of employment, and this negatively affects their creativity and ability to work on their creative careers;
- People have lost crucial connections/networks. This is more acute for artists living in the top 20% deprived areas;
- People have suffered enormous financial and mental distress which can impact their ability to work and future prospects;
- The longer-term impacts and uncertainty is exacerbating creatives' stress and anxiety. This is more acute for artists living in the top 20% deprived areas;
- Significantly under-estimated income losses: impacts will only be truly known when people return to work, most likely on a phased basis, and comparisons are made with last normal year, 2019.

Earlier research conducted in July 2020 demonstrates that despite the contribution the arts have made to people through the COVID-19 pandemic, particularly in lockdown, they have been unable to fully monetise new methods of digital delivery; with 40% of respondents have been unable to earn any income from these new methods of working.

### **UK Wide Research Findings**

Research funded by Arts Council England<sup>1</sup> found that a significantly higher number of employees in the creative sector have been leaving their occupations than in previous years and that COVID-19 had acted as a force multiplier on creative freelancers whose employment was already under strain. Further, particular demographic groups, notably women and younger people, had been disproportionately affected by the pandemic.

### **Conclusion**

The body of evidence already available demonstrates that there is immediate financial insecurity for those working in the creative industries and that career and skills development have been negatively affected. There is the significant risk that the talent pool of artists and creatives, necessary for the overall creative ecosystem, will leave to find alternative work. This will take the sector years to recover from.

The £13m additional support from the UK Government will meet only some of the need, and should be released through grant programmes as a matter of urgency.

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<sup>1</sup> [Big Freelancer Report - Freelancers make theatre work](#)

## Introduction

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This paper has been produced by the Arts Council of Northern Ireland's (ACNI) Strategic Development team to assist and support the Department for Communities and Cultural Recovery Task force to collate evidence demonstrating the need to prioritise a sectoral survival fund for individual artists ASAP. We hope this provides a useful source of information.

The paper also includes the associated attachments below:

- I. [PDF report](#) analysing COVID impacts on individual artists based on a response to a specific question (A9) in the May 2021 emergency grant survey.
- II. Excel data tables from the May 2021 emergency grant survey showing numbers and percentages of responses against each question.

The research reports and data tables for both the artist and organisation emergency grant survey are scheduled for publication in September 2021.

The ACNI research programme aims to:

1. Build evidence based knowledge and understanding of the role and impact of art on people's lives;
2. Identify patterns of engagement and factors affecting engagement in the arts; and
3. Help create more diverse, equal and confident communities by addressing inequalities as they related to race, disability and gender.

Strategic Development has lead responsibility for the Arts Council's research, policy development and planning functions. It gathers information, analyses data, evaluates programmes and generates evidence to inform decision making processes. The team also has responsibility for meeting the Arts Council's equality and disability compliance duties.

ACNI Research publications can be found here:

<http://artscouncil-ni.org/news/publications-archive/g/research>

# 1. Strategic Context

## 1.1 Financial Context

We understand that the evidence requested should focus on and prioritise COVID impacts on individual artists and the remainder of the document will cover that solely. However, the financial situation below illustrates the important context on the structural nature of the sector.

Despite fulfilling almost identical functions, spending comparisons with other regions of the United Kingdom and in the Republic of Ireland demonstrate the extent of underinvestment in the Arts in Northern Ireland. Northern Ireland has the lowest levels of per capita Government spending on the Arts, and the disparity of funding continues to grow. Based on 2020/21 budget, the Arts Council of Northern Ireland receives only £5.38 per capita, contrasting sharply with Wales at £10.41 and the Republic of Ireland £28.52

Republic of Ireland	£28.52
Wales	£10.41
Northern Ireland	£5.38

The chart below illustrates the financial environment ACNI operates within. This is important to note to set the context for the remainder of the paper.

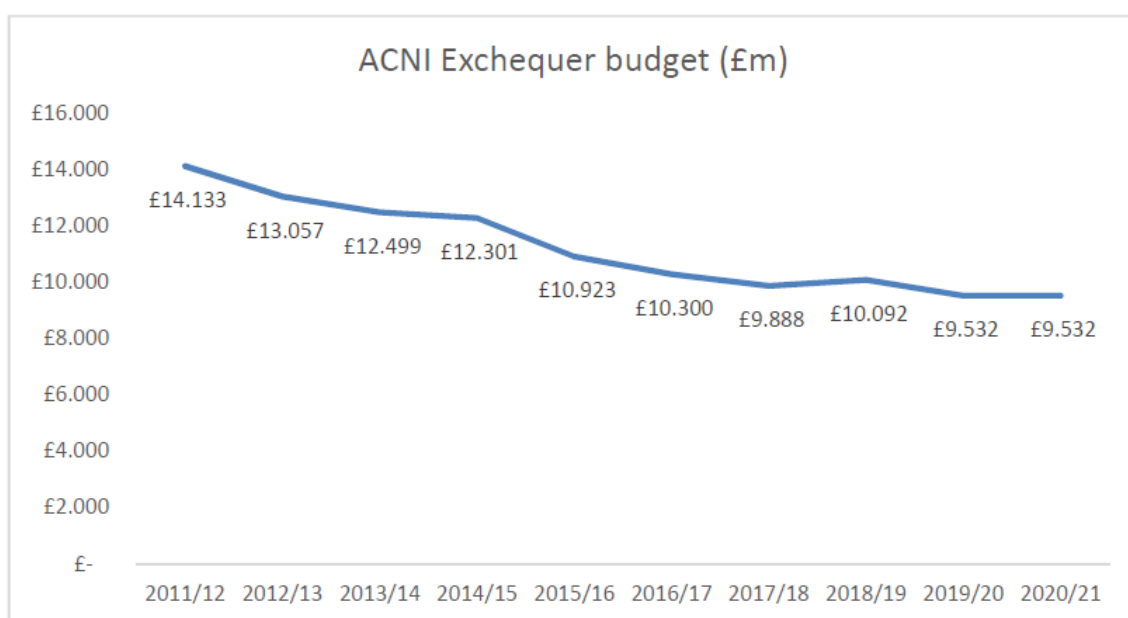


Figure 1. Systematic Reductions in Exchequer Funding

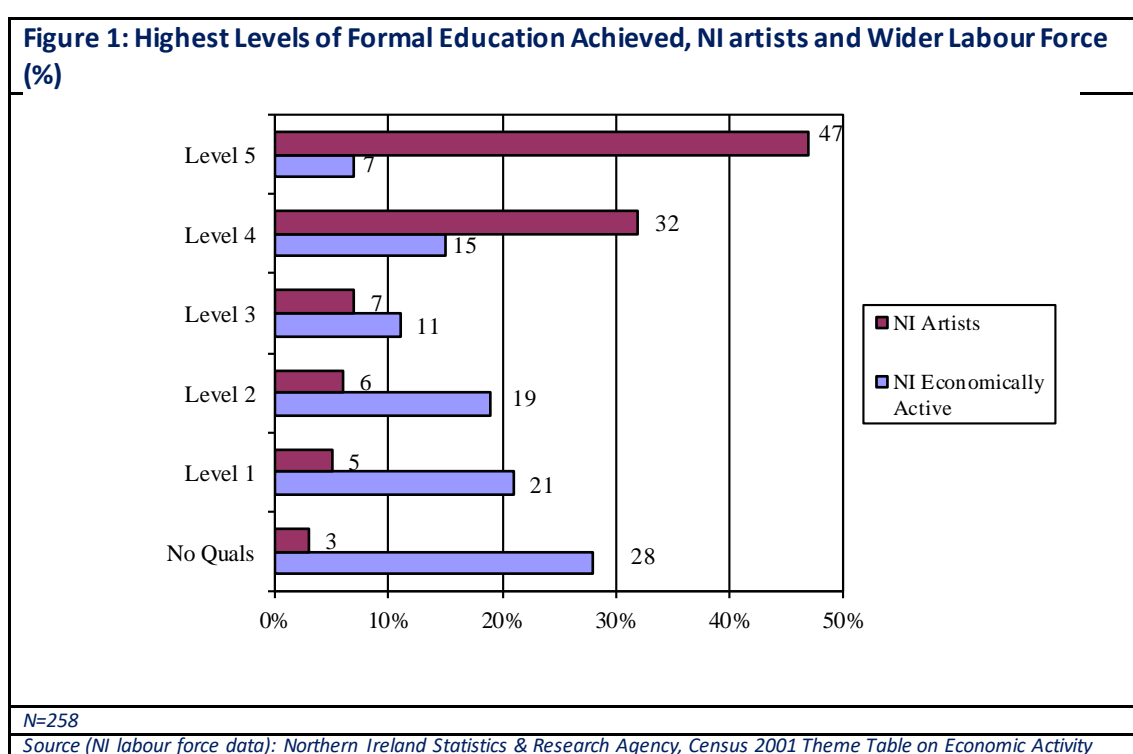
## 1.2 Summary of evidence from Living and Working Conditions of Artists and other sources

### Living and Working Conditions of Artists

Commissioned by ACNI and An Chomhairle Ealaíon in 2010. We strongly advise investing in this work in the future to update the baseline developed here.

Key findings relevant to the DfC Business Case to support a sectoral survival fund for individual artists:

Artists in NI have higher levels of formal education than the wider labour force. Data based on the five levels of education used in the NI census is shown below<sup>2</sup>.



The proportion of professional artists with a third-level qualification is 79% which compares to 22% for all NI workers. This gap reflects (and is even larger than) the gap found in a wider 2003 UK study<sup>3</sup>, which found that more than half of artists had third-level degrees or higher levels of education, compared to one quarter of the wider UK population.

Two-thirds of NI artists have undertaken specific academic or formal training in relation to their work as artists, with one in five having undertaken private training. Artists in the performing arts &

<sup>2</sup> **Level 1:** GCSE (grades D-G), CSE (grades 2-5), 1-4 CSEs (grade 1), 1-4 GCSEs (grades A-C), 1-4 O Level passes, NVQ Level 1, GNVQ Foundation or equivalents. **Level 2:** 5+ CSEs (grade 1), 5+ GCSEs (grades A-C), 5+ 'O Level' passes, Senior Certificate, 1 A Level, 1-3 AS Levels, Advanced Senior Certificate, NVQ Level 2, GNVQ Intermediate or equivalents. **Level 3:** 2+ 'A Levels, 4+ AS Levels, NVQ Level 3, GNVQ Advanced or equivalents. **Level 4:** First degree, NVQ Level 4, HNC, HND or equivalents. **Level 5:** Higher degree, NVQ Level 5 or equivalent

<sup>3</sup> Davies, R. and Lindley, R. (2003) *Artists in Figures: A Statistical Portrait of Cultural Occupations*. Arts Council of England, London

film were more likely to undertake private training, perhaps reflecting a lack of available third-level courses. In addition, over half of the artists had undertaken other education and training (including residencies or summer schools).

Continuing professional development (CPD) is important to many professional workers and this is also true for artists. More than two in five NI artists had undertaken CPD in the previous year in relation to their creative development as artists.

A desire for ongoing upskilling is seen in that a majority of artists in all art form groups consider CPD important to their careers. However, only a minority believes that sufficient CPD opportunities are available with artists in the performing arts & film most likely to believe there are insufficient opportunities for continuing education, training and development.

NI artists spend on average over three-fifths of their working time working as artists, with the remainder divided between other work in the arts and work outside the arts. Almost half of the time that artists spend working as artists is spent in either unpaid or speculative work and, although some of this work may lead to future income.

Fewer than half of NI professional artists (45%) spend all of their working time as artists. Many artists balance their work as artists with other work, either in or outside the arts. Reasons why NI artists undertake such 'other' work are shown below.

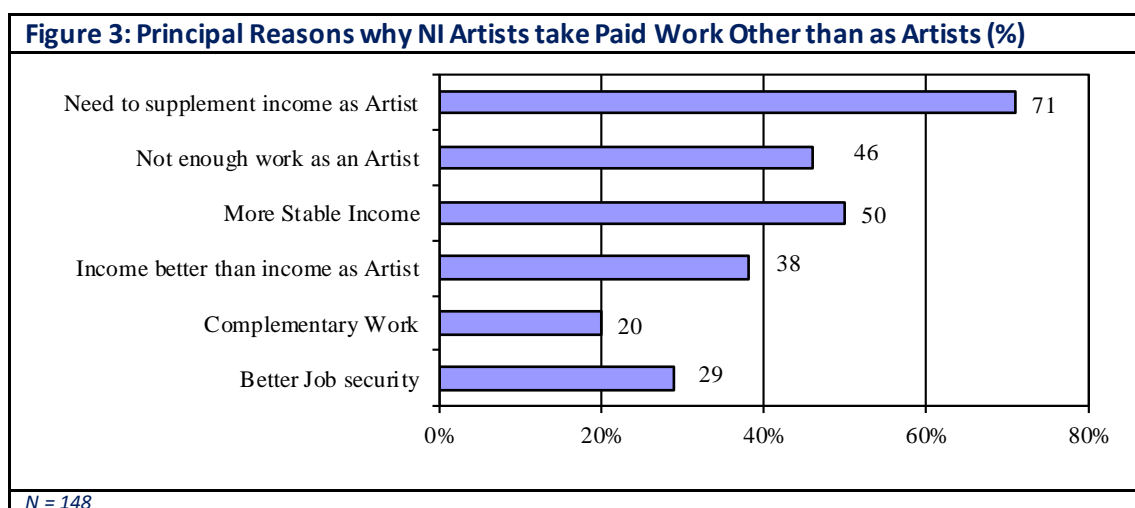


Figure 3 shows that artists generally engage in 'moonlighting' (i.e. work other than as artists) not out of a desire for multiple jobs or a 'portfolio career' but to supplement and stabilise their incomes, and due to a lack of work as artists. Well over half of all NI artists say that working other than as an artist is important in supporting their career financially. In 'moonlighting', the most common jobs that artists take are as teachers/lecturers or in other positions in the arts, e.g. as administrators or managers.



The fact that many artists combine different jobs contributes to more than half of artists (56%) often or always working more than 40 hours per week and the one-third often or always working more than 55 hours per week. These long working weeks compare to the 48-hour average week set as a limit under the EU Working Time Directive<sup>4</sup>. The long working hours, and their work patterns, are also likely to be contributory factors to 42% of NI artists saying that their artistic work makes it hard for them to achieve a good work/life balance and more than half saying that their careers involve high levels of stress.

## Unemployment

The nature of many artists' work patterns, as outlined above, can lead to periods of unemployment. Some 15% of NI artists had registered as unemployed in the year prior to the study. This may in fact be an underestimate of total unemployment as some artists (especially those who are self-employed) may not register as unemployed if they are out of work for a short period of time. Of those who registered as unemployed in the year prior to the study, half had been registered as unemployed for periods of at least 15 weeks.

Of the NI artists who received unemployment payments in the three years prior to the study, one in five said that they experienced difficulties in receiving payments because of their status as an artist. Issues cited included a lack of understanding by relevant government departments and agencies of their work patterns, issues arising from the status of many artists as self-employed and National Insurance related issues.

## Income

The average (mean) income of professional NI artists from their work as artists was just under £7,500 in 2008/09 (in 2021, this would equate to roughly £10,319) with 50% of artists earning £4,191 or less from their work as artists. When income from all sources (including social welfare) is taken into account, the average (mean) income for an NI artist in 2008/09 was just over £14,500 (£19,951 in 2021), with 50% of artists earning £11,746 or less (£16,162 in 2021).

Income from working as an artist is 30% lower for female than for male artists. While the sample sizes are lower for the results by gender (which can lead to less precise results), the data suggests that this gap in favour of male artists is highest for artists in the visual arts group. It is also higher for artists working on a self-employed basis or a combination PAYE/self-employed basis compared to those working on a PAYE basis as artists.

Inspire and Ulster University's 'Changing arts and minds – A survey of Health and Wellbeing in the Creative Sector' ([research from 2018](#)) also provides a useful analysis of the nature of income in the sector. For example, 20% of creative workers are paid less than poverty line.

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<sup>4</sup> European Foundation for the Improvement of Living and Working Conditions (2009) *Working Conditions in the EU: Working Time and Work Intensity*. At [www.eurofound.europa.eu](http://www.eurofound.europa.eu)

## Income compared with other workers

Data for 2008/09 from the NI Department of Enterprise, Trade and Investment divides workers into occupational categories and Figure 5 compares NI artists' total personal incomes to average earnings in these categories, as well as to the average earnings for all NI workers.

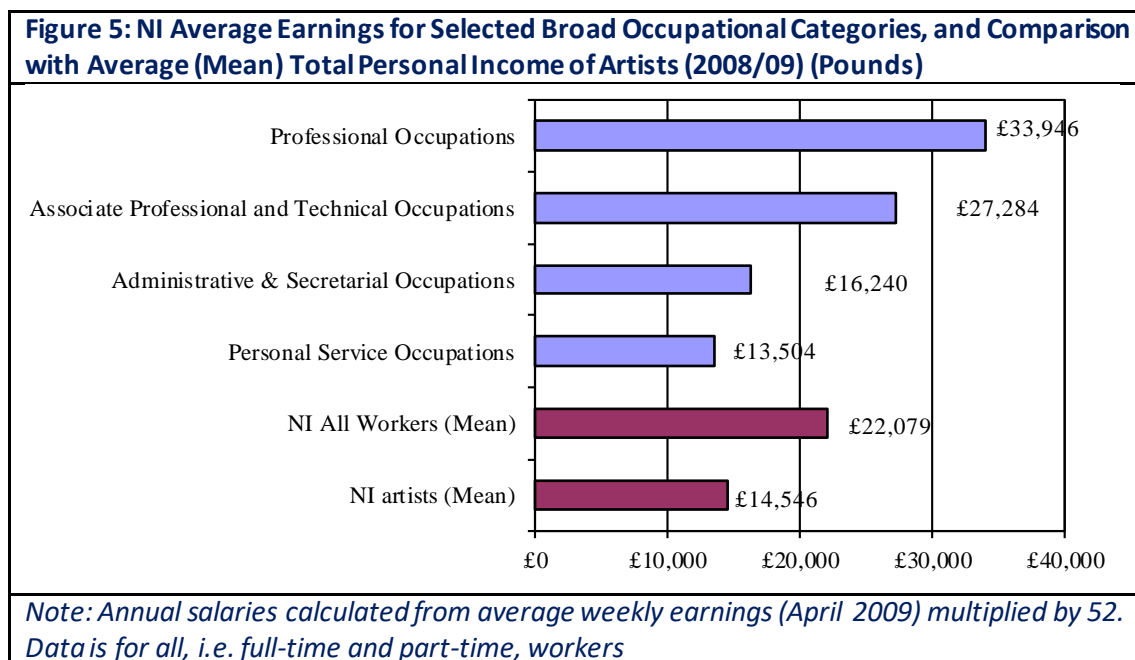


Figure 5 shows that the average (mean) income for a NI artist in 2008 was higher than the earnings of workers in personal service occupations (e.g. dental nurse, hairdresser or caretaker). However, artists' incomes fell behind those for a range of other occupational categories.

Four out of five artists would again choose to work as artists if they were starting over. This was true for all three artform groups. A key reason for this for many artists is the nature of their work as artists, the fact that many feel drawn to it as a 'vocation', and the fact their work as artists provides personal as well as career fulfilment.

The cumulative study findings show that, for many NI artists, working as a professional artist constitutes a difficult and uncertain way to make a living. Despite relatively high levels of education, work patterns are volatile and many artists report leading stressful lives in which they find it hard to obtain or maintain a good work-life balance, and may experience periods of unemployment. Income levels are low relatively to other workers, especially workers with similar educational backgrounds.

## 2. Economic Context

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Funded Arts organisations are incubators for the creative industries. They play an important role in creating the environmental conditions for the wider sector to develop. The creative industries are at the heart of social, economic and cultural regeneration, providing jobs and driving growth in communities.

In 2020 DCMS [reported](#) that “the Creative Industries contributed £115.9bn in 2019, accounting for 5.9% of UK GVA. The GVA of Creative Industries has increased by 5.6% between 2018 and 2019 and by 43.6% between 2010 and 2019 in real terms. By comparison, the construction industry contributed £129.3bn, the automobile industry contributed £49.1bn, and agriculture £13.0bn.”

[In 2018](#) the Northern Ireland creative industries were worth £1.2bn to the NI economy, employed 29,000 people (3.4% of all jobs) and grew 5% faster than other areas of the economy in NI between 2018 and 2019. There are an estimated 3,200 creative businesses in NI, and account for 5% of all business units.

The creative industries provide an even broader contribution towards the economy, including their contribution towards tourism: the success of TV and film productions in NI has seen [increased visitor numbers](#) to Northern Ireland; in NISRA’s Northern Ireland Visitor Attraction Survey 2019 Museums/Art Galleries accounted for 14% of all visitor attendances

## 3. Structural context and wider impacts

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### 3.1 [Annual Funding Survey](#)

The Arts Council’s Annual Funding Programme (AFP) is the most significant allocation of public funding for the arts in Northern Ireland each year. The aim of the AFP is to support Northern Ireland’s arts infrastructure through grants to organisations in all art forms and practices for their core and programming costs. AFP organisations will be key to helping us achieve the objectives set out in our 5-year strategic framework for developing the arts, *Inspire / Connect / Lead*<sup>[4]</sup>, and we expect all awardees to support us in delivering these objectives.

In 2019-20, The Arts Council supported 97 organisations by awarding £12.8m through Exchequer and National Lottery funds. In the context of funding constraints, and loss of income as a result of COVID-19 we will mitigate the impact of spending reductions and protect “frontline services”. We will foster the principles of adaptive resilience, encourage arts organisations to collaborate with each other, and assess commercial opportunities through new digital platforms. In collaboration with Arts & Business NI we will work to raise awareness of the work of Trusts and Foundations, and alternative forms of arts finance.

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<sup>[4]</sup> *Inspire / Connect / Lead*, <http://www.artscouncil-ni.org/images/uploads/publications-documents/ACNI-Draft-5-year-Strategic-Framework-for-Developing-the-Arts-2019-2024.pdf>

Organisations in receipt of funding from the AFP from the Arts Council of Northern Ireland, are required to complete an annual survey on the activity they deliver, their workforce composition and income and expenditure for the relevant year.<sup>[5]</sup>

The ACNI Annual Funding Survey ([AFS figures](#)) gives a useful insight into the nature of the sector by surveying ACNI core portfolio of clients each year. Economists recognised the need for intervention in NI given the structural nature of the sector here. Key insights are highlighted below and further data is available [here](#).

- For every one permanent staff member there are six contracted
- 5,474 contract staff (5,034 of these are artistic staff)
- AFS volunteer numbers fell by 20% compared to the previous year; male volunteers fell by a quarter. Despite this, the number of hours spent volunteering increased to 72,745. This resulted in an overall increase in the average number of volunteer hours from 21 to 26 per person
- Recruitment of all types of apprenticeships have fallen over the past four years by 51% with the exception of ‘unaccredited apprenticeships’, which has seen a slight uplift. The number of paid internships and formal apprenticeships have seen the largest decline over this period.
- Only 13% aged 16-24 (pg. 10)

\*The AFS reflects the best case scenario as the analysis refers to staff formally employed in some capacity to our core portfolio organisations and we know from the theatre and dance freelance research report that this does not reflect all creative practitioners in NI. Nonetheless, it gives a helpful insight into the dominance of contractors/freelancers in the creative sector.

### **3.2 SMR population survey and PfG**

- ACNI commissioned Social Market Research (SMR) to conduct a population survey ([report](#)). There is a range of data points explored in the survey, but most notably how audiences engaged with the arts throughout COVID for personal enjoyment and wellbeing (68%). This is a critical focus of the PfG and the arts have a significant role in the vision of ‘improving wellbeing for all’.
- The Programme for Government (PfG) is based on a shared and strategic vision for the future which aims to improve wellbeing for all. There are considerable research outputs that demonstrate how the arts does not work in isolation and impacts other sectors (e.g. health, education, economy etc.). However, the PfG outcome 5, ‘We are an innovative, creative society where people can fulfil their potential’, would be at a substantial risk of not being achieved without protecting individual artists.

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<sup>[5]</sup> [Microsoft Word - 1920 AFS Headline Report V2 \(artscouncil-ni.org\)](#)



## Important Context for artists in Northern Ireland

- The majority of performing artists have not been permitted to work legally (therefore no change from March 2020).
- Audience spaces have been closed under law.
- This would be a payment to cover the ongoing impacts of COVID-19 which has removed a skilled and experienced proportion of the workforce from their primary method of working.
- These freelancers have built their homes and lives (and thus liabilities) around income they have not been permitted to make.
- As of July 2021 (almost 6 months since the last emergency programme) performing artists cannot play in indoor live venues, while weddings, and dedicated arts performance spaces are either still closed or have restricted opening.
- Each type of venue that reopens may only support a particular type of artist.
- Each venue that reopens will be unable to make their maximum ticket income.

## 4.2 May 2021 – Artist Emergency Survey (associated data tables will give further detail)

The survey:

- Demonstrates the impact of previous awards and what was achieved;
- Evidences loss of income and financial insecurity;
- Understands future uncertainty;
- Demonstrates the need to protect careers in the sector.

The survey was designed to carefully ensure we captured evidence that could assess if the original policy objectives of the emergency programmes had been met (i.e. to **stabilise** viable organisations and venues within arts, heritage, culture and language sectors to enable them to **survive, adapt and renew**), **protect skills/jobs** to adapt and build back better and for publically-funded organisations to identify opportunities to increase **access, participation and capacity** for people and communities **most disadvantaged** and socially excluded in society.

Context:

- The ACNI emergency survey was designed with the main intention of understanding the impact of the 20-21 emergency grants, not exclusively to make the case for future support funding, even though we tried to capture this, the May survey fieldwork date will no doubt impact how individuals view their medium-long term financial security (when they received the grant 3 months previous) – however still important to note that half of respondents could not agree that their medium to long-term financial security has improved.
- The survey was already lengthy, there is a limit to what we could ask.
- Most of these results relate to the large IERP programme through the Barnett Consequential.



Key insights (please see attached tables for raw data):

- I. 1,030 artists responded to an online survey delivered independently by SMR (45% response rate). The results are representative of the population by key variables (rural/urban, deprivation and LGD).
- II. The questions related to the 20-21 year, therefore there is no doubt the grants impacted the immediate financial stress (the last grant received in March 21), but as half of respondents could not say that their medium- to long-term financial security has improved in May, there is still a requirement to ensure we protect the sector.
- III. Question C4 explores impacts of the 20-21 grant; out of six statements, respondents were less likely to strongly agree/agree with the statement 'my medium to long-term financial security has improved' (49% strongly disagree/disagree/neither) and over a third (35% disagreeing that their future as a creative professional is more certain).
- IV. Average income lost (over £13k) is much more than the average grant received (max £5k) and the survey indicates how acute those financial implications were for artists (e.g. three quarters stating they had to completely remove any non-essential spending).
- V. Almost half of respondents relied on grants for more than 50% of their income. Only 26% of artists selected that the funding helped their future career in relation to 'creating an income stream that they have established as an ongoing element of their artistic practice'; there are also other research sources that articulate the challenges of income generation through digital content.

### **Survey Findings**

Respondents to the emergency survey were able to select all art forms that they worked within and the survey comprised of predominately musicians, or those that worked within the music sector (52%), but with other higher representation from Community Arts, Visual Arts, and Theatre (each 25%+).

20-25% of respondents had stated that as a result of Covid-19 restrictions, and related loss of earnings, they had struggled with basic food costs, paying for heating, or making rent / mortgage payments. A similar number of respondents needed to apply for universal credit.

Amongst respondents the average lost income was £13k, and even if recipients availed of every grant they would not be able to make up for these losses. 76% of respondents lost more than 50% of their income, and 49.4% lost more than 75% of their income.

Grant income contributed a significant amount of the respondents' income, with 47% relying on grants for more than 50% of their income, and 26% relying on grants for over 75% of their income.

Grants were used predominantly for future artistic creation (71%); but this relies on venues to be open to perform this content. Although 35% of respondents created work for digital online, previous research has shown that artists are not able to earn enough through this to make up for live and in-person performances.

Grants were also used to cover artists' financial losses:

- 76% of respondents' grants contributed towards replaced lost income
- 53% used grants to meet basic food costs
- 46% used grants to pay for heating
- 51% used grants to pay for rent / mortgage payments
- 27% didn't need to apply for universal credit
- 60% didn't have to seek other employment

The data indicates that emergency funding has been able to protect careers, 90% of respondents felt the grant protected their career in the creative industries and 70% of respondents are still trading as a creative practitioner. 36% stated that they would have ceased to trade without the grant funding and although immediate financial stress has been relieved, 35% are still uncertain about their future career and only 50% believe the grant has strengthened medium / long term financial security. By now, artists have still not been able to work 'normally' and this means continued financial pressure has been applied on artists.

### Survey Limitations

It is important to note that this survey does not capture their housing costs, utilities bills, heating bills, or other liabilities and that the May fieldwork date is close to when most respondents received their grant (i.e. IERP2, representing the majority of respondents) and this may have positively biased their responses.

### Qualitative Analysis of the Emergency Survey

The PDF report (A9 analysis) gives further detail of the impacts of COVID for individual artists and quotes to demonstrate needs and evidence that:

- Continued financial stress will lead to creatives leaving the sector
- The ability for career development/progression and ability to create new material has been significantly hampered by restrictions, closures and limited financial support
- People have been forced to find alternative means of employment, and this negatively affects their creativity and ability to work on their creative careers
- People have lost crucial connections/networks
- People have suffered enormous financial and mental distress which can impact their ability to work and future prospects
- The longer term impacts and uncertainty is exacerbating creatives' stress and anxiety
- Significantly under estimated income losses: impacts will only be truly known when people return to work, most likely on a phased basis, and comparisons are made with last normal year, 2019.

394 artists answered the question and provided additional narrative on the impacts of COVID-19. Their answers may have multiple codes/themes attached to it. The top 5 themes in order are:

- I. Almost half of those who responded noted lost income (46% responded mentioned this specifically and many more who didn't mention it exactly but you could assume what they said linked to a lost income) many stating it was difficult to project just how much was lost given the lack of opportunities to work and the unknowns and lots of freelancers/self-employed who had slipped through the net of other schemes
- II. Over in 1 in 3 who responded noted cancelled/rescheduled shows meant the inability to work (39%)
- III. 1 in 5 noted Lack of career development/progression and ability to create new material (20%) – very concerning, people noting they feel like they are back to 'square one', have lost their connections and creativity due to worry, poor mental health and lack of financial security
- IV. Almost 1 in 5 who answered noted mental health, anxiety and stress related to financial uncertainty and feeling 'undervalued' (19%)
- V. More than 1 in 10 who answered noted uncertainty for the future (15%), many claiming that even if the sector reopens in full tomorrow, with long lead in times and backlog etc. many foresee not being back to pre-COVID capacity until well beyond 2022.



		Count	Column N %
A9 Covid impacts - coded	cancelled/rescheduled shows	154	39.1%
	career development/progression/new material	79	20.1%
	caring responsibilities	7	1.8%
	digital challenges	22	5.6%
	homelessness	7	1.8%
	isolation	5	1.3%
	lost connections	35	8.9%
	lost income	180	45.7%
	mental health	73	18.5%
	other	7	1.8%
	physical health	8	2.0%
	positive response	5	1.3%
	survival	13	3.3%
	uncertainty	59	15.0%
	Universal credit	7	1.8%
	Total	394	100.0%

### 4.3 Other research outputs – income generation

The section below aims to demonstrate that it has been incredibly difficult for artists to generate income from digital outputs.

#### **SMR outputs Nov 2020:**

- Audiences mainly support a free-to-view model for consuming arts (83%)

#### **July 2020 COVID individuals survey – key findings on income generation:**

It is clear that many creatives have been able to adopt some alternative working methods; however, anecdotally the sector has made clear that despite the contribution the arts have made to people through the COVID-19 pandemic, particularly in lock-down, they have been unable to fully monetise these new methods of delivery. We know that 40% of respondents have been unable to earn any income from these new methods of working; but it was important to gauge how much creatives have been able to earn. The overwhelming majority (n=209, 72%) earned less than 25% of their income, since lockdown began, through these new ways of working. This indicates either that audiences are not interested in paying for the arts in this way or that artists are unable to generate income through new ways of working. This poses a serious, long-term risk for artists and creatives.

How much of your income do you anticipate these new methods of working will have contributed, starting from lock down in March until the 30 September 2020?	Total	Percent
They will have contributed all of my earned income	46	15.08%
More than 50% of my income	17	5.57%
Between 25 - 50% of my income	23	7.54%
Less than 25% of my income	106	34.75%
None	113	37.05%
Not Answered	0	0%

Respondents were given the option to quantify how much these alternative sources of income had generated. A total of 43 responses were received for this part of the survey, ranging from £6,000 to £70, with an average earning of £1,156 through these new ways of working. These responses were cross-referenced against the responses to the previous question, which can help to gauge the total income of these respondents. Given the low level of responses within each category it is not possible to present these as representative of the sector; however they illustrate cases of the financial circumstances faced by artists.

Of those respondents whose total income was generated through these alternative sources (n=9), they averaged only £1,147 of creative income over this period. The inferred average income in the table below is only indicative of total income and is calculated using the mid-point of each category. This provides insight into the financial difficulties experienced by NI artists and creative practitioners.

Proportion of Income	n	Average Income	Inferred Average Total Income
They will have contributed all of my earned income	9	£1,147	£1,147
More than 50% of my income	2	£1,250	£1,667
Between 25 - 50% of my income	5	£2,880	£8,640
Less than 25% of my income	26	£862	£6,900
None	1	£70	N/A

ACNI have consistently monitored COVID impacts for artists and organisations since March 2020. Further survey insights related to artists are below:

#### **Summary from July 2020 (see appendix for tables):**

This web-based survey, run through NI Direct's Citizen Space consultation platform was open for 15 days between the 7 July and 22 July 2020. 305 artists and creative freelancers responded to the survey, from across Northern Ireland and across the breadth of the creative industries.

#### *Financial Impact*

From ACNI's previous survey for NI artists it was clear that artists' income and practice had been severely affected by the lockdown. Quoting an average loss of earnings of £3,756 between March and May.

In this survey, 44% of respondents projected losing more than 75% of their creative income between March and 30 September, and only 20% projected losses of less than 25%. Respondents were given

the opportunity to detail their loss of earnings quantitatively and of the 86 responses (28% of respondents) the average projected loss between March and 30 September was £13,000; a total of £1.1m.

Artists are looking for alternative ways to work (65%), however at present 40% of artists have not been able to earn income through these new ways of working; such as remote working and streaming of services. Although 60% have been able to earn through alternative ways of working, they have only been able to earn an average of £1,156 (n=43).

#### *Severity of Financial Impact*

65% of artists considered that COVID-19 had either a severe or very severe financial impact on them, with only 4.3% believing that there had been no impact and 1% considering their financial position had improved.

After 5 months of lockdown and social distancing, 36% of artists are unsure if they will continue their career as a creative practitioner, with 22% applying to receive universal credit, 16% unable to meet housing costs and 11% struggling to pay for food. A prolonged period of social distancing, with the possibility of further periods of lockdown if covid-19 infection rates rise, would exacerbate artists' and freelancers' situation.

#### *Impacts of COVID-19 on artists' ability to work*

Artists' creative practice has been affected in a range of ways due to the early lockdown and continued social distancing, and 59% of respondents have had a reduced ability to meet their partners and collaborators. The restrictions put on them have been most notable in the cancellation of events, performances and other activities either by partners they work with (88% affected) or by themselves (64%). 20% of respondents have had payment for their work withheld as a result of COVID-19, and 40% have experienced difficulty accessing their workspace. This combination of loss of expected income and inability to easily work creates a difficult financial position for artists.

## **4.4 The average SIAP stats and distribution**

Artists of all disciplines and in all types of working practice, who have made a contribution to artistic activities in Northern Ireland for a minimum of one year within the last five years, may apply to the Support for Individual Artist Programme. Applications can be made for project assistance, travel grants or residencies, up to a maximum award of £3,000.

### **FY20-21**

Total awarded: £718,717

Average award... £2,513

Number of awards: 286

188 awards were £2,000+

98 awards under £2,000

## 4.5 The emergency grant distribution data (e.g. average grants)

This analysis is based on 2,294 individuals, the majority received 1 grant.

1 grant	1,791	78%
2 grants	437	19%
3 grants	66	3%
total	2,294	

The table below shows the distribution of the final emergency awards for individuals:

	Mean	Mode	Median	Maximum	Minimum	Valid N
AEP	2443	3000	2500	5000	500	224
IERP1	3549	3000	3000	6000	1200	1079
IERP2	4425	5000	5000	7500	585	1560

The table below shows the quartile distribution of the final emergency awards for individuals:

		AEP	IERP1	IERP2
N	Valid	224	1079	1560
	Missing	2070	1215	734
Percentiles	25	1545.75	3000.00	4000.00
	50	2500.00	3000.00	5000.00
	75	3000.00	5000.00	5000.00

The table below illustrates categories of award:

		Count	Column N %
aep	under 2000	71	31.7%
	2000 - 2999	59	26.3%
	3000 - 3999	67	29.9%
	4000 - 4999	24	10.7%
	5000+	3	1.3%
	Total	224	100.0%
ierp1	under 2000	171	15.8%
	2000 - 2999	0	0.0%
	3000 - 3999	459	42.5%
	4000 - 4999	0	0.0%
	5000+	449	41.6%
	Total	1079	100.0%
ierp2	under 2000	78	5.0%
	2000 - 2999	86	5.5%
	3000 - 3999	201	12.9%
	4000 - 4999	116	7.4%
	5000+	1079	69.2%
	Total	1560	100.0%

Caveats:

- Data extract that was used for the May 2021 survey sample (live database may have changed)
- Administrative dataset and has not been cleaned. Three obvious outliers have been amended.

#### **4.6 Short summary of how the £2k proposal was reached for the £5.5m programme**

- 2,294 individuals from the last rounds of funding
- At £2k each = £4,588,000
- That leaves £912k for anyone else who didn't get funded last time (possibly 456 people)

#### **4.7 Why Universal Credit (UC) is not appropriate for freelance artists**

- I. Universal credit applicants will be assigned to a work coach who will expect individuals to demonstrate they are looking for work. It is very clear there is no work available. Should people seek more employment outside of the sector – there is evidence to suggest the negative impacts that has for the sector (the more hours worked elsewhere means they don't have as much time to contribute to the creative sector as they would have). Many artists already work outside the sector to supplement their income.
- II. The nature of freelance income makes UC very difficult (many ineligible)
- III. Economists' data illustrates that applications receiving UC for more than 6 months increases the likelihood of not returning to the workforce.
- IV. The purpose of furlough was to keep people engaged in the workforce and prevent applications to social security benefits. Furlough did not apply to the majority of workers in the arts sector as the majority are not 'employees'.
- V. Further analysis of the UC dataset, should it be available would be useful to inform this section.

#### **4.8 Inequalities**

When we look at the impacts of COVID on artists living in the top 20% deprived areas versus the others, there are three key areas more prevalent for these.

1. Career development/progression/new material – almost a third (30%) of those artists living in deprived areas stated this as a concern compared to 18% in other areas. This is alarming as we wouldn't want to exclude and undo hard work that has been ongoing to ensure representation and opportunities for those in deprived areas
2. Those artists in the 20% most deprived areas are more likely to note losing connections and 'starting again' with their network (13%) compared to 8% of artists who aren't in deprived areas
3. Over 1 in 5 Artists (23%) in the 20% most deprived areas stated mental health, stress and anxiety compared to 18% in the other areas

		Top 20% most deprived		Remaining 80% quintiles	
		Count	Column N %	Count	Column N %
A9 Covid impacts - coded	cancelled/rescheduled shows	26	36.6%	125	39.6%
	<b>career development/progression/new material</b>	<b>21</b>	<b>29.6%</b>	<b>58</b>	<b>18.4%</b>
	caring responsibilities	1	1.4%	6	1.9%
	digital challenges	3	4.2%	18	5.7%
	homelessness	3	4.2%	4	1.3%
	isolation	0	0.0%	5	1.6%
	<b>lost connections</b>	<b>9</b>	<b>12.7%</b>	<b>26</b>	<b>8.2%</b>
	lost income	30	42.3%	146	46.2%
	<b>mental health</b>	<b>16</b>	<b>22.5%</b>	<b>56</b>	<b>17.7%</b>
	other	0	0.0%	7	2.2%
	physical health	0	0.0%	8	2.5%
	positive response	0	0.0%	5	1.6%
	survival	3	4.2%	10	3.2%
	uncertainty	7	9.9%	51	16.1%
	Universal credit	3	4.2%	4	1.3%
	Total	71	100.0%	316	100.0%

## 4.9 UK-wide evidence

### Centre for Cultural Value

Extracts taken from 'The impact of COVID-19 on jobs in the cultural sector' by Rebecca Florisson, Dave O'Brien, Mark Taylor, Siobhan McAndrew and Tal Feder. 2020. Based on an analysis of LFS data.

#### The impact of COVID-19 on jobs in the cultural sector - part 3 - CultureHive

This article analyses data from the Labour Force Survey from the Office for National Statistics. It looks at the impact of the pandemic on freelancers specifically, and how the effects have been felt unevenly across different demographic groups and different sub-sectors of the cultural and creative industries.

The story of freelancers with creative occupations is, in some ways, a similar story to those who are more securely-employed in creative occupations, as the general insecurity (coupled with greater flexibility) of particular types of creative work has translated to smaller numbers of jobs and lower hours across the board.

However, freelancers are more vulnerable than their securely-employed creative counterparts as they have not had the same types of direct support. Indeed, freelancers have been the subject of high-profile concern and campaigns due to the lack of support they have received from the government compared with those furloughed from secure employment.

The recent Budget suggests some of this concern may have been heard, with more support made available for the freelance workforce as a whole. However, it is unclear whether this will be enough, particularly for those occupations such as music, performing, and visual arts that face uncertainty over the timing and extent of re-opening. Particular demographic groups, notably women and younger people, also appear to have been distinctively affected, as evidenced by creative occupation job numbers. Specific, targeted, support is almost certainly needed.

**A jobs crisis in the cultural and creative industries:** Creative Industries Policy & Evidence Centre (pec.ac.uk) (2020). Dr Gwilym Owen, Dr Dave O'Brien, Dr Mark Taylor

In the six months following the beginning of lockdown, we have seen:

- A collapse in working hours across the creative industries
- 55,000 job losses (a 30% decline) in music, performing and visual arts
- Significantly higher than average numbers of people leaving creative occupations compared to previous years

### **Creative occupations**

Creative occupations include many jobs in the creative industries, for example writers, film makers and game designers, but also people doing creative roles in other industries such as designers working in manufacturing companies.

Using the ONS dataset, we found that 15% of people who worked in creative occupations in January-March in 2020 were no longer working in creative occupations in April-June (see *figure 1*). This is significantly greater than between the same period in the previous five years, where on average we see around 10.5% of creatives leave the sector.

We also found that the percentage of workers who left creative occupations between April to September in 2020 was higher than normal, at 12.5% compared with 10.5% - although in this case the difference is not statistically significant.

Of those who reported having left creative occupations between Q1 (January-March) and Q2 (April-June) around two thirds (69%) were now working in other occupations, while 10% of those who left creative occupations were classified as unemployed.

The shift in numbers working in music, performing and visual arts occupations is clearly significant. The number of workers in these occupations dropped from around 200,000 in January-March to around 160,000 in April-June and then again to around 145,000 in July-September, a decline of almost 30% since pre-lockdown. When we looked at it from the industry-wide perspective mentioned earlier, rather than an occupational perspective, we found similar results.

## **Creative Freelancers**

### **The Big Freelancer Report**

*Freelancers Make Theatre Work, April 2021*

The Big Freelancer Report maps the problems facing the freelance workforce and makes practical recommendations for change. This report was created by an independent group of performing arts freelancers, supported by Freelancers Make Theatre Work and funded by Arts Council England.

#### The freelance problem

1. For freelancers in the performing arts, COVID-19 has acted as a force multiplier on an employment system that was already under strain.
2. In a well-designed structure, pressure is distributed evenly. In a poorly designed structure, pressure collects around a specific area. When that system is placed under additional stress, the point of maximum pressure is the first to fall. The 'collapse' of the performing arts began on 23 March 2020. Whilst every part of the sector has been damaged by that collapse, freelancers have been decimated.
3. As the work of sector repair continues, it is essential that the system of freelance employment is radically remodelled to distributed pressure more evenly. ACN's own research exploring new roles for freelance workers operating in drama reflects the need for change.
4. The report identified 7 pre-existing problems that COVID-19 has exacerbated:
  - Employment status
  - Fair pay
  - Talent development and training
  - Working conditions
  - Inclusion
  - Access to sector assets
  - A power imbalance
5. The pandemic has led to the emergence of three new challenges:
  - The income emergency
  - A retention crisis
  - Working under COVID-19 restrictions
  - The future success of the performing arts rests on the health of its workforce.

Unless the problems are confronted and remedied, the nation's cultural recovery will be incomplete, leading to further sector decline.



## 5. Final comments

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The Arts Council has provided all available information / data sources to fulfil Departmental requests and we hope this paper is helpful in making the case for urgent support for individuals working in the creative sector, as had been the case across the UK and Ireland. This compendium of evidence includes the provision of interim data on emerging findings from our two latest surveys which sought to evaluate the benefits of emergency funding support for organisations and individuals. We feel that, collectively, this information (both qualitative and quantitative) demonstrates sector needs in support of potential future programme support.

Our research capacity, in terms of both finances and human resources is limited and we have committed to undertake a broad-based programme of research to support the delivery of our Five Year Plan. Exercises, such as the one just completed, demonstrate the need for ongoing, strategic monitoring of the sector to support the development of policy in a timely and proactive way.

Reviewing the data, ACNI believes there is enough existing evidence through primary and secondary sources to demonstrate the ongoing needs of the creative sector which has been so badly impacted, both individuals and organisations, as a result of the pandemic. This illustrates that there is immediate financial insecurity, career/skills development is completely undermined and there is significant risk that our talent pool will be diminished as artists and creatives leave to find alternative work. This is a pool which will take years to get back.

The £13m additional support from the UK Government will meet only some of the need, and should be released through grant programmes as a matter of urgency.

Whilst value for money is of course key to any government intervention, the Arts Council is aware that individuals facing the pressures and worries attested to in the research above, are not necessarily able to undertake artistic projects as would be normal under, for example, Arts Council awards and bursaries. Nor, indeed, is that appropriate given the wider footprint of creative sector workers such as stage designers, technicians, camera operators and costume designers who work in support of the sector, not as the creators of original art work, who need support under an individual's programme to help mitigate the loss of income they have all experienced.

Consequently, we recommend a light-touch to scheme to allow artists and creative workers to 'buy time' to focus on skills and personal development, and if possible and there is scope, for artists to make work.

## 6. Appendices

What proportion of your income is derived from creative practice as an individual artist or freelancer?	Total	Percent
All of my income	174	57.05%
More than 50% of my income	51	16.72%
Between 25 - 50% of my income	30	9.84%
Less than 25% of my income	41	13.44%
I do not earn any income through my creative practice	9	2.95%
Not Answered	0	0%

Since the initial government guidance on social distancing and self-isolation has come into force, what has been the impact on your work?	Total	Percent
Difficulty accessing workspace	120	39.34%
Reduced ability to meet partners / collaborators	181	59.34%
I had payments for work withheld	62	20.33%
I had upcoming work cancelled including events, performances and public activities	267	87.54%
I had to cancel my own upcoming work, including events, performances and public activities	194	63.61%
My work has not been impacted to date	10	3.28%
Other	19	6.23%
Not Answered	0	0%

How much of your creative income do you anticipate you will have lost, starting from lockdown in March until 30 September 2020 due to Covid19?	Total	Percent
My income has remained stable	22	7.21%
Up to 25%	38	12.46%
26-50%	53	17.38%
51-75%	58	19.02%
More than 75%	134	43.93%
I will have made more than I expected	0	0%
Not Answered	0	0%

Income loss between March and 30 September 2020	No.	Number Quantifying Losses	Sum of Quantified Losses	Average Quantified Loss	Projected to total sample
More than 75%	134	45	845700	18793	2518307
51-75%	58	16	132900	8306	481763
26-50%	53	14	86200	6157	326329
Up to 25%	38	11	53200	4836	183782
Total	283	86	1118000	13000	3510180

Since lockdown began in March, indicate the impact Covid-19 has had on your income?	Total	Percent
Improved Financial Position	3	0.98%
No Impact	13	4.26%
Small Impact	27	8.85%
Moderate Impact	63	20.66%
Severe Impact	98	32.13%
Very Severe Impact	101	33.11%
Not Answered	0	0%

Which of the following statements would apply to your financial position as a result of Covid-19?	Total	Percent
I have been unaffected*	9	2.95% (6%)
I have had to cut back on luxuries*	65	21.31% (43%)
I have had to completely remove any non-essential spending	179	58.69%
I have struggled to meet basic food costs	35	11.48%
I have struggled to pay for heating	30	9.84%
I have been unable to make rent / mortgage payments	48	15.74%
I applied to receive universal credit	68	22.30%
I would prefer not say	38	12.46%
Not Answered	4	1.31%

As a result of Covid-19, which of these statements apply to you regarding your creative practice?	Total	Percent
I will continue to work at my creative practice	196	64.26%
I am looking for alternative ways to generate additional income through my creative practice	198	64.92%
I may not be able to continue my work as a creative practitioner	74	24.26%
I am actively looking for employment to supplement my creative practice	87	28.52%
I am unable to continue my creative practice	7	2.30%
I am actively looking for employment to replace my creative practice	35	11.48%
Not Answered	0	0%

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