ARTISTS' BUSINESS NEEDS ASSESSMENT

MARCH 2022

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pôle entrepreneuriat
culturel et créatif

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ACKNOWLEDGMENT

Promotor: YES Employment and Entrepreneurship

YES is a non-profit, community-driven, English-language service provider that has been helping Quebecers find employment and develop as entrepreneurs since 1995.

Our mission is to help English-speaking Quebecers reach their potential. At YES, we give you the skills and confidence to develop a personal career or business strategy through workshops, personalized coaching and so much more

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SECTION 1: EXECUTIVE SUMMARY / RÉSUMÉ

Purpose of Study

This report aims to share information to aid in the development of Quebec's Artists' Official Language Minority Community and help identify potential economic opportunities for this population within the province.

The organizations involved in this report share a commitment to making arts research more widely available. They also share a commitment to informing stakeholders of the business realities of artists and the support needed for them to actively participate and contribute to Quebec's creative economy in light of the COVID-19 crisis.

Methodology

An online survey was launched by the team of YES Employment & Entrepreneurship (YES) on December 17, 2021 and ran until January 17, 2022. It consisted of 38 questions.

A survey campaign was developed, and digital posters were shared via YES Employment & Entrepreneurship's community partners throughout the province. The sample was composed of approximately 700 English-speaking artists, who are clients of the YES Artist Entrepreneurship Program, and additionally, English-speaking artists who were recruited by the YES and PECC teams, ELAN (English Language Arts Network), or other community partners who shared the online survey with their clients and networks. Finally, a series of email and social media (e.g., Facebook, Twitter, & Instagram) posts rounded out the campaign.

The survey campaign resulted in 110 finalized questionnaires (the objective was to collect 80-100 online survey responses). The analysis was conducted by Geraldine Dallaire (Pôle entrepreneuriat culturel et créatif), in February and March of 2022.

Limitations of the Data Collected:

+ Size of the sample: the analysis is based on 110 artists. Most statisticians agree that in order to get any meaningful results, a minimum sample size should be 100. As the sample size is on the smaller end, data should be interpreted with a level of caution.

+ Select regions may be less represented since the survey participants are concentrated in Montreal, Outaouais and Capitale-Nationale.

+ The survey campaign was conducted through YES' network and Partner networks; this might have had an influence on the sample (over-representation of visual-artists, fewer artists in the regions) and on the answers (YES and YES' community partners aim to support artists, so we can suppose that the respondents receiving their services tend to benefit from more support and/or business training than others).

KEY RESULTS

Some of the key findings for the Artist Business Needs Assessment are summarized below.

Revenue Issue

The majority of the study's participants indicated that their art business revenue was under $5,000, and 35% said it was between $5,000 and $29,999 for 2021. Furthermore, a significant portion of the sample (57%) observed that the portion of their revenue earned from art-related practices was less than 50%. This indicates that many artists need to have sources of income outside of their artistic practice. This might also indicate the need for artists to better understand how to monetize their work if they want to practice their art full-time.

We do not have the total revenue earned by each artist (including from non-art related sources), but the information provided suggests that some respondents may live with an income close to the poverty line or that their artistic practice is not a self-sustaining business at this time.

It should be noted that an income disparity has been found between Anglophone and Francophone Quebecers. Indeed, according to the 2016 census, Jack Jedwab, president of the Association of Canadian Studies complied data that highlighted that 11.8% of English speakers live below the poverty line, compared to 7.6% of French Speakers or the provincial average of 9.2%. (CBC, Quebec allophones, anglophones more likely to live below the poverty line than Francophones, study finds, 2018)

Studies also indicated a difference between the median incomes of Francophone and Anglophone artists. Indeed, artists' median income in Quebec is $23,700 for Anglophones and $27,800 for Francophones, which is respectively 44% and 34% less than all workers in Quebec (Hill, 2020) (Appendix, Figure 3).

Importance of Digital Marketing

In part because of COVID-19, digital marketing has become more of a priority to professional artists' lives, but they do not feel like they have much expertise in it:

+ Respondents mainly present their art on their personal online platforms (social media: 70% and website: 62%).
+ 42% state that their marketing and promotional efforts bring them new business, but 26% have no idea of the impact of those efforts, and 32% consider that their efforts have no results.
+ Many of the respondents are not at all or not confident in managing their web presence (58%) or promoting their art (52%), but they perceive marketing and social media as essential or useful (91%).
+ While many consider digital marketing skills, such as the use of social media, E-commerce, distribution platforms, etc., as important, they express that they have little expertise in the matter.

Importance of Financial Aspects

Financial development is essential for participants, but they do not feel confident in their ability to navigate it:

- Respondents show particularly low confidence in the following areas: getting representation (82% are not so, or not at all confident), connecting with buyers regionally (74%) or locally (66%), and getting funding (69%).

- Monetizing their art is an issue for 56% of participants.

- Respondents share that their next step in business development is mainly linked to financial aspects: 27% wish to increase their sales, and 18% are looking to obtain a grant or other funding.

The question of obtaining funding is clearly a concern. This is one of the skills that most respondents are not confident with but consider essential. As participants struggle to make a living from their artistic activity, they may see access to funding as a means to achieve their financial goals. However, skills related to marketing, sales and customer service are seen as less important. This leads us to suspect that participants expect to develop their activities primarily through funding rather than through sales.

Networking

Networking is seen as essential or useful by 86% of participants, but 55.5% of respondents express low confidence around seeking support from the business community or peer network.

COVID-19 Impact

Lockdowns

The COVID-related challenge most shared by participants (61%) was having to face lockdowns and the closing of art exhibitions and performance spaces. Through various news outlets, artists spoke about the stress of not knowing how to plan for, and cope with, rapidly changing government policies regarding the opening of spaces during the pandemic. Respondents confirm that this has indeed been a challenge for them.

Impact on Production

Most participants (62%) experienced a change or were forced to adapt their practice due to COVID-19. Clearly, the pandemic had an impact on the way artists produce:

- Many had to move online to work (video conferencing, teaching or presenting their work online).

- This produced some key challenges, such as promoting one's work online. Artists do not always have the skill set or access to experts to develop a digital strategy. Indeed, many of them faced difficulties around discoverability and how to sell online.

- Some had to stop or change the type of work they were doing. Others found themselves focusing more on the creation of new artwork rather than exhibition or promotion.

Impact on Revenues

The effect of the pandemic did present a range of results where 66% of respondents experienced decreases in revenue and 44% experienced no revenue change or an increase, but questions arise around the potential loss of opportunities and momentum created over the past two years, and its possible long-term effects on an artist's career trajectory. In addition, some artistic disciplines were more negatively impacted than others, but the study sample size is too small to evaluate this difference in more detail.

Impact on Mental Health and Productivity

These past two years have highlighted the need to work on one's well-being.

In some cases, working conditions deteriorated when artists had to work from home. For example, some had to look after their children, others had limited space or were lacking the right materials to work. All these factors no doubt impacted artists' ability to create. Indeed, 48% of participants expressed that they had experienced a decrease in productivity and motivation because of the pandemic and 54% indicated having difficulty maintaining consistent focus.

Respondents expressed a form of isolation. They brought up a wish to network with peers or with individuals who could help them with their business needs.

Due to the self-employment nature of artists, more mental health check-ins, or resources may be needed. Indeed, it would be helpful to have different points of contact for artists, such as business coaching, mentorship, and other clinics to ensure that a more holistic approach is being taken with their business and creative needs.

RÉSUMÉ

Objectif de l'étude

Ce rapport a pour intention de partager de l'information afin de contribuer à la compréhension du profil de la communauté des artistes de langue anglaise au Québec et d'identifier des opportunités économiques pour cette population au travers de la province.

Les organisations impliquées dans cette étude sont engagées pour rendre la recherche en art plus largement accessible. Elles ont également en commun leur volonté d'informer les parties prenantes de la réalité entrepreneuriale des artistes ainsi que de leurs besoins en termes de soutien, afin de participer activement et contribuer à l'économie créative du Québec dans un contexte de crise de la COVID-19.

Méthodologie

Un questionnaire en ligne a été lancé par l'équipe de YES Employment & Entrepreneurship (YES) entre le 17 décembre 2021 et le 17 janvier 2022. Il était composé de 38 questions.

Une campagne a été développée, composée de publications digitales et a été partagée au travers de la province par la communauté de partenaires de YES. La base de données utilisée était composée d'environ 700 artistes de langue anglaise qui sont actuellement des clients du programme entrepreneurial de YES. Cela inclue également des artistes de langue anglaise qui ont été recrutés par l'équipe, ELAN, ou par l'un des partenaires de la communauté de YES et qui ont partagé le questionnaire en ligne à leurs clients et réseaux. De plus, une série de courriels ainsi que des affichages sur les médias sociaux (c.-à-d. Facebook, Twitter et Instagram) ont complété la campagne.

La campagne a permis de récolter 110 questionnaires finalisés (l'objectif était de collecter 80-110 réponses). L'analyse a été réalisée par Géraldine Dallaire (Pôle entrepreneuriat culturel et créatif) en février et mars 2022.

Les limites :

+ La taille de l'échantillon : l'analyse est basée sur 110 réponses. La plupart des statisticiens s'accordent sur le fait que pour avoir des résultats significatifs, il important d'obtenir un échantillon minimum de 100 répondants. Comme la taille de l'échantillon est tout de même petit, l'interprétation des résultats doit être réalisée avec précaution.

+ Certaines régions sont moins représentées comme les participants à l'étude se trouvent concentrés à Montréal, Outaouais et la Capitale-Nationale.

+ La campagne a été principalement réalisée au travers du réseau de YES. Ceci a pu avoir une influence sur la nature de l'échantillon (surreprésentation des artistes visuels, peu de professionnels en région) et sur les réponses (YES et la communauté de partenaires de YES visent à soutenir les artistes, aussi peut-on supposer que les artistes dans ce type de réseau sont susceptibles de bénéficier de plus soutiens que d'autres).

RÉSULTATS CLÉS

Certains des résultats clés de l'étude sur L'évaluation des besoins en gestion des artistes sont résumés ci-dessous.

Les revenus

En 2021, la majorité des participants à l'étude considère que le revenu pour leur activité artistique est au-dessous de 5000$, et pour 35% il se situe entre 5 000 $ et 29 000 $.

De plus, une part importante des participants (57%) observe que le pourcentage de leur revenu issu de leur pratique artistique est inférieur à 50%. Ceci indique peut-être le besoin de mieux comprendre comment monétiser leur travail s'ils souhaitent devenir des artistes à temps plein. On peut également supposer que la majorité des artistes ont besoin d'avoir d'autres sources de revenus que ceux issus de leur pratique artistique.

Nous n'avons pas le montant total des revenus des participants (incluant leurs activités non artistiques), mais ces informations tendent à laisser supposer que certains des répondants vivent avec un revenu proche du seuil de pauvreté et que leur activité artistique n'est pas viable à l'heure actuelle.

Par ailleurs, une compilation de données réalisée en 2016 par Jack Jedwab, président de l'Association des études canadiennes, souligne que 11.8% des personnes de langue anglaise vivent en dessous du seuil de pauvreté, comparé à 7.6% des francophones et 9.2% des Québécois en général. (CBC, Quebec allophones, anglophones more likely to live below the poverty line than Francophones, study finds, 2018).

Cette disparité de revenu semble également exister chez les artistes. Le revenu median des artistes au Québec est de 23 700$ pour les Anglophones et de 27 800$ pour les francophones, ce qui est respectivement 44% et 34% en dessous de ceux des travailleurs au Québec (Hill, 2020).

Importance du marketing digital

Certainement en partie à cause de la COVID-19, le marketing digital est devenu central dans la vie professionnelle des artistes, mais, ils ne partagent pas le sentiment de posséder beaucoup d'expertises en celui-ci :

+ Les répondants présentent leur art principalement sur leurs plateformes personnelles en ligne (médias sociaux : 70%, site web : 62%).
+ 42% affirment que leurs efforts en marketing et promotion leur apportent des affaires. Mais 26% n'ont aucune idée de l'impact et 32% considèrent que leurs actions n'ont aucun résultat.
+ Beaucoup d'entre eux ne sont pas confiants en Gérer leur présence web (58%) ou Promouvoir leur art (52%), mais ils perçoivent le Marketing et les médias sociaux comme essentiels ou utiles (91%).

- Alors qu'ils l'évaluent comme important, ils ont peu d'expertises dans les aspects du marketing digital comme l'utilisation des médias sociaux, le E-commerce, l'utilisation des plateformes de distribution…

Importance des aspects financiers

La question du développement financier est essentielle pour les participants, mais ils n'ont pas confiance en leurs compétences pour réussir :

- Les répondants partagent que la prochaine étape du développement de leur activité est principalement liée à un aspect financier : 27% disent que leur prochaine étape sera d'augmenter leurs ventes, 18% cherchent à obtenir une bourse ou un financement ;

- Monétiser son art est un enjeu pour 56% des participants ;

- Les répondants sont particulièrement peu confiants dans le fait de réussir à se faire représenter (82% ne sont pas ou pas du tout confiants), dans la possibilité de se connecter avec un acheteur régional (74%) ou local (66%) ou dans le fait d'accéder à un financement (69%).

La question du financement apparait clairement comme une préoccupation. L'obtention de financement est l'une des compétences en lesquels la plupart des répondants ne sont pas confiants, mais qu'ils considèrent comme importante d'avoir.

Comme les participants ont du mal à vivre de leur activité artistique, ils perçoivent peut-être l'accès au financement comme un moyen de réaliser cet objectif. Cependant, les aspects liés au marketing, les ventes et les services clients sont vus comme moins importants. Par conséquent, on peut se demander si les répondants imaginent développer leurs activités principalement grâce à des financements plus que par la vente de leur art.

Réseautage

Le réseautage est considéré comme essentiel ou utile par 86% des participants. Mais il représente également une préoccupation. En effet, bénéficier du soutien d'un réseau de pairs ou de la communauté ne semble pas évident à obtenir : 55,5% d'entre ne sont pas confiants avec cela.

Impact de la COVID-19

Les fermetures

Le défi le plus partagé par les participants est d'avoir dû faire face aux fermetures des lieux d'exposition et des espaces de performance (61%).

On a beaucoup entendu parler pendant la pandémie du stress causé par le fait de ne pas savoir comment planifier et faire face aux rapides changements de mesures gouvernementales. Les répondants confirment que ceci a été un défi pour eux. L'incertitude a été difficile à gérer.

Impact sur la production

La plupart des participants (62%) ont été forcés d'adapter leur pratique à cause de la COVID-19. Clairement la pandémie a eu un impact sur la façon dont les artistes produisent :

- Ils ont dû passer en ligne pour travailler (Visioconférences, enseigner, présenter leur travail en ligne);
- Ces changements ont été source de défis, comme la promotion en ligne de son travail. Les artistes n'ont pas toujours les compétences ou l'accès à des experts pour développer des stratégies digitales. Par conséquent, nombre d'entre eux font face à des enjeux de découvrabilité et pour vendre en ligne.
- Certains ont dû arrêter de produire ou changer le type de travail qu'ils réalisaient. D'autres ont de se concentrer sur leur création plutôt que d'exposer ou promouvoir leurs œuvres.

Impact sur les revenus

La pandémie a eu une variété d'impacts, et 66% ont vécu une baisse de revenu et 44% n'ont subi aucun changement ou une croissance, mais des questions se sont soulevées sur la perte de certaines opportunités et de dynamisme suite à ces deux dernières années demeurent, ainsi que l'effet potentiel sur les trajectoires professionnelles des artistes. De plus, certaines disciplines artistiques en particulier semblent avoir été impactées négativement, mais l'échantillon de l'étude est trop petit pour évaluer les différences en détails.

Impact sur la santé mentale

Ces deux dernières années ont fait ressortir le besoin de travailler sur le bien-être. En effet, les répondants partagent une forme de sentiment d'isolement. Certains expriment le besoin de réseauter avec des pairs ou des personnes pouvant les aider à développer leurs activités. 54,5% des répondants indiquent que maintenir un focus est un enjeu pour eux.

Dans certains cas, leurs conditions de travail ont été détériorées quand ils ont dû travailler à la maison. Par exemple, ils ont dû s'occuper des enfants, travailler avec moins d'espace ou sans les matériaux adéquats pour leur pratique. Ceci a mené à des pertes de motivation ou d'inspiration, ce qui a impacté la capacité des artistes à créer. En effet, 48% des participants expriment avoir vécu une baisse de productivité et de motivation.

Note : En raison de la nature du travail des artistes, qui sont travailleurs autonomes, il importe de leur proposer des bilans, et de leur mettre à disposition des services en santé mentale ainsi que de leur proposer différents points de contacts comme du coaching d'affaires, du mentorat ou d'autres cliniques afin de s'assurer qu'une approche holistique soit réalisée vis-à-vis leur métier.

SECTION 2:
ARTISTS' SOCIODEMOGRAPHIC PORTRAIT

This section gathers information from different sources in order to build a sociodemographic portrait of artists in general, and more specifically, of English-speaking artists in Quebec, with an additional highlight on visual artists.

There are over 726,600 cultural workers in Canada and among them, 158,100 artists. This represents respectively 4% and 87% of the overall labour force (Hill, 2019). Consequently, artists make up a significant portion of workers: for example, their number is greater than that of workers in automotive manufacturing (146,200) or utilities (136,400) (Hill, 2019).

Musicians and singers (22%), authors and writers (18%), as well as producers, directors and choreographers (17%), make up the three main artistic occupations in Canada (Appendix, Figure 1).

Artists, like cultural workers in general, tend to be more educated than the general population. Indeed, the number of artists with a bachelor's degree or higher is 47% vs. 28% for all workers. We also observe fewer artists in Canada with no high school diploma (6% vs. 10% of all workers), only a high school diploma (21% vs. 26% of all workers) or with an apprenticeship or trades certificate (4% vs 11% of all workers) (Hill, 2019).

Canadian artists mainly earn less compared to other Canadian workers. Regarding median income, Canadian artists earn 44% less than all Canadian workers: in 2019, the median income of Canadian artists was $24,300 versus $43,500 for all Canadian workers (Appendix, Figure 2). Average incomes tend to be a little bit higher than the median as a small number of artists have high incomes: the average is $38,500 while the average income for all workers is $56,900 (Hill, 2019).

The gap between artists and all workers is even higher if we bring education into the picture. As mentioned, artists and cultural workers tend to have higher education levels. And, according to 2016 statistics, the average employment income for a person in Quebec, with a Certificate or University diploma was $69,418 (Statistics Canada, 2019). However, even taking into account that this last figure represents employment incomes, (52% of artists are self-employed versus 12% for all Canadian workers - Hill, 2019), it still indicates a staggering income disparity.

Cultural workers also earn a lower income, but the difference is not as drastic: they have a median individual income of $41,000 (6% less than that of all workers) (Hill, 2019).

Women artists have lower median income than men ($22,300 vs. $27,100). More specifically, they have lower median incomes in six of the nine arts occupations: authors and writers; visual artists; dancers; artisans and craftspeople; other performers; and conductors, composers, and arrangers. Women and men actors are more equal as they have nearly the same revenues. Women have a better situation than men in two arts occupations: musicians and singers as well as producers, directors, and choreographers (Hill, 2019).

Focus on English-speaking Artists in Quebec

There are 7,300 English-language artists in Quebec, which constitutes 4.6% of all Canadian artists. As a percentage, it is higher than the representation of English-language workers in Quebec's overall labour force (which is 2.8%) (Hill, 2019). Indeed, we observe a higher concentration of artists among Anglophones compared to Francophones in the province (1.4% vs. 0.78%). This highlights the importance of the arts sector to the vitality of the English-speaking community in Quebec and its potential impact on the economy.

Artists' median income in Quebec is $23,700 for Anglophones and $27,800 for Francophones, which is respectively 44% and 34% less than that of all workers in Quebec (Hill, 2020) (Appendix, Figure 3). Specifically, Hill (2020) highlights that Anglophone artists have lower median incomes in seven of the nine arts occupations documented: Authors and writers ($41,700 vs. $43,900), Musicians and singers ($17,900 vs. $18,300), Producers, directors, choreographers and related ($40,500 vs $52,300), Visual artists ($18,300 vs $22,500), Artisans and craftspeople ($19,200 vs $20,500), Actors and comedians ($19,900 vs $26,900) and Other performers ($16,000 vs $18,400) (Appendix, Table 2).

While racialized Canadians are under-represented among artists (15%) compared to all workers (21%) (Hill, 2019), Hill (2020) underlines that the proportion of Indigenous, racialized, or immigrants to Canada is greater among Anglophone than Francophone artists[1].

The largest occupations among Anglophones artists in Quebec are Authors and writers, and Musicians and singers. For example, among Authors and writers, we can underline that the percentage of Anglophone artists is much higher compared to Francophone artists (24% vs. 13%). On the other end of the spectrum, a lower percentage are Producers, directors and choreographers (16% vs. 26%) (Appendix, Table 1).

Focus on Visual Artists

As this study has a high representation of visual artists, it is relevant to propose a better understanding of their situation.

Visual arts represent 13% of artists' occupations in Quebec (I.e., 21,100 workers) (Hill, 2019). Visual artists tend to be older as 57% are at least 45 years of age, whereas this proportion is 46% for all artists and 44% for all workers (Hill, 2019). They have a bachelor's degree or higher to a greater extent than all workers (44% vs. 28%), but the proportion is slightly lower than that of all artists (47%) (Hill, 2019).

The RAAV and FDC (2022) report highlights visual artists' situation in Quebec. According to this study, they tend to live in a greater proportion in Montreal (38.5%), Capitale-Nationale (10.6%) and Montérégie (19.1%). RAAV and FDC (2022) also observe that many respondents have a high education: 64.5% hold a university diploma in visual arts whereas 12.7% of the sample is self-taught.

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1 Indigenous: 2,1% Anglophone artists vs.1,6% Francophone artists; racialized: 15% of Anglophone vs. 5% of Francophone; immigrants to Canada: 23% of Anglophone vs. 10% of Francophone.

Visual artists in Canada are mainly self-employed. With a proportion of 66%, they observe the highest percentage of freelancers among the nine occupations documented by Hill (2019). This is much more than the proportion of all artists (52%) and all workers (12%) (Hill, 2019).

The main revenue drivers for visual artists are the art market (68.8% declare sales as their main source of art revenue), professional contracts (30.6%) and royalties (20.7%) (RAAV and FDC, 2022).

Art vs non-art related income

Some further findings from the FAAV and FDC study were that 2/3 of participants specified visual arts as their main activity, however it was only the main source of income for 24.1% of them. Moreover, 62.1% of respondents earned less than 20% of their income from their art practice.

In addition, some participants expressed willingness to branch out into other sectors. If they do so, that would certainly further diminish the proportion of art revenue within visual artists' total income (RAAV and FDC, 2022).

Income Levels

The median income of visual artists in Canada in 2016 was $20,000, and their average income was $31,700. In both cases, this is lower than that of all artists (median: $23,300 and average: $38,500). Compared to all workers, the difference is even more pronounced: visual artists' median and average income are about half of that for all workers (Median: $43,500, average: $56,900) (Hill, 2019).

Indeed, visual artists who answered RAAV's survey live with an income close to the poverty line. In 2019, 53.7% of respondents earned less than $30,000. In addition, 32.7% earned less than $20,000, whereas the poverty line in 2018 stood at $20,080 for a single person. The average income according to this same study was $31,815 in 2021, which is close to the Canadian average income for visual artists[2] (Appendix, Table 3).

In general, the financial precarity of visual artists has increased with the pandemic. Specifically, those who were most impacted were artists in the lower income tier: the number of artists earning less than $20,000 increased by 5% between 2019 and 2020 (Appendix, Figure 4). In addition, one of the consequences of COVID-19 was the decrease of funds for artists: in December 2020, 3/4 of respondents received no support for artistic projects and observed a significant decrease in income from private or municipal funding (RAAV and FDC, 2022).

Another key observation was that visual artists in the report declared getting few subsidies from the government: 57% of respondents had no government support (for example: solidarity tax credits, QST credits or social assistance) between 2015 and 2019. Notably, because of their self-employed status, many at that time could not benefit from Employment Insurance. On the other hand, 40.7% asked for

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2 For record: $31,700 in 2016 according to Hill (2019).

artists' grants. This search for external financing might imply a need for support to make their art practice sustainable.

Finally, it's important to note that most visual artists (80.7%) in the report did not ask for the Canada Recovery Benefit (CRB). During consultations and in the survey, many expressed being confused and thinking they would need to give a portion or the whole amount back. This is an example of the vulnerability of this population when it comes to accessing financial information.

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SECTION 3: STUDY'S RESULTS

Presentation of Study's Sample

Figure 1 reveals that survey participants primarily speak English (61%) or are bilingual English and French speakers (25%) (Figure 1). They are practicing artists (95%), mainly between 25 and 54 years old (84%) (Figure 2).

The overwhelming majority of participants primarily operate in Montreal (83%) with a minority in Outaouais (11%)

FIGURE 1
Official language primarily spoken by participants

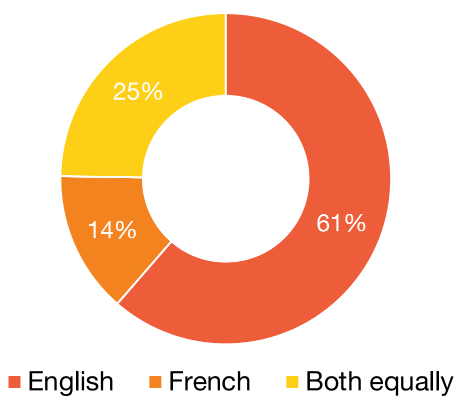


FIGURE 2
Age distribution among participants

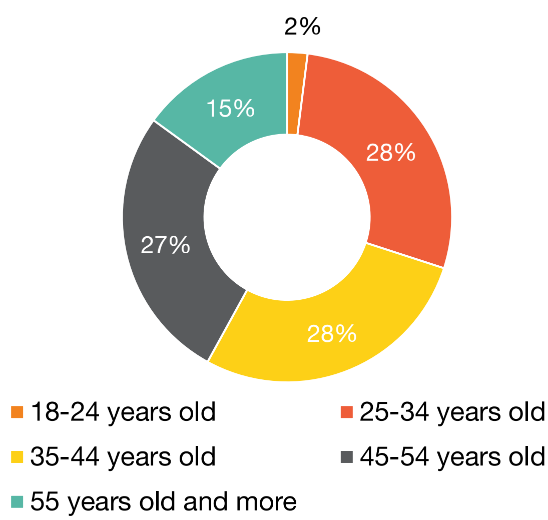
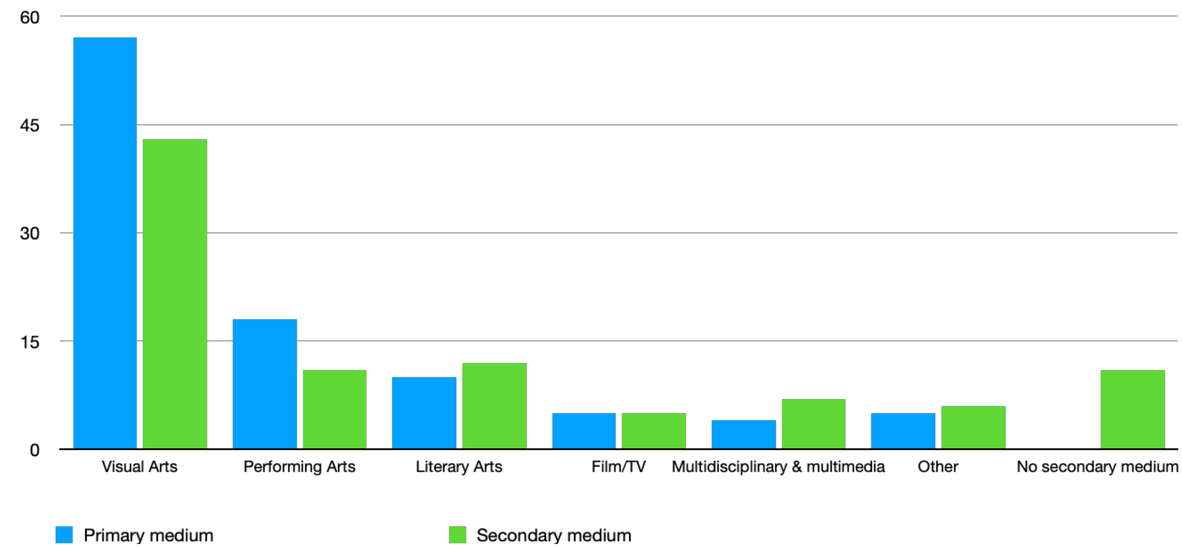


Figure 3 highlights that visual artists are predominantly represented: 57% of respondents practice this form of art as primary medium and 43% as a secondary one, followed by performing arts (18% as a primary and 11% as a secondary practice).

Among visual artists, 44% indicate painting and drawing as their main practice.

It should be noted that this sample might over-represent creatives in Montreal compared to the study results shared in the artist sociodemographic portrait. For example, RAAV and FDC (2022) observe a greater proportion of participants in Montreal (38.5% of the respondents), but not as great as in this study. Visual artists are also in the majority, whereas other studies tend not to consider this as the main occupation for English-speaking artists (Hill, 2020).

FIGURE 3
Art-form practiced by participants (primary and secondary medium, in %)

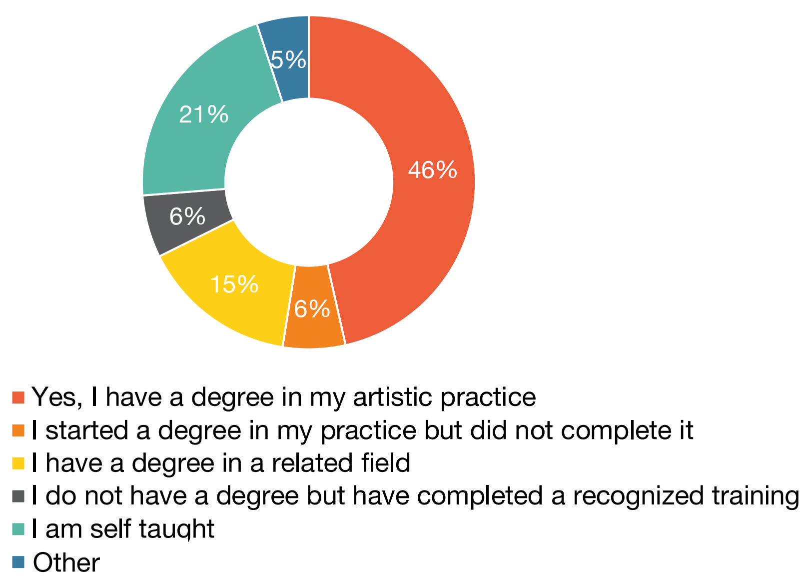


Participants' Training

The path to developing one's artistic skills can come in various forms, as indicated in Figure 4. Whereas 21% of the surveyed artists are self-taught, 27% have started or obtained a degree or some formal training, and 46% have completed a degree in their practice.

As is the case in the sociodemographic portrait, this study reveals that artists in general tend to be highly educated, though the number of self-taught artists is more important than in the study by RAAV and FDC (2022), in which only 12.7% of the visual artists in Quebec were self-taught[3]. These figures indicate that artists are dedicated to their craft and profession; however, some have not obtained formal training.

FIGURE 4
Distribution of participants according to their level of arts education



3 We do need to specify that the RAAV and FDC (2022) sample is mainly composed of visual artists holding a RAAV membership and that this organization requires certain professional criteria of its members. Therefore, it might favour artists holding a degree, thus influencing its numbers.

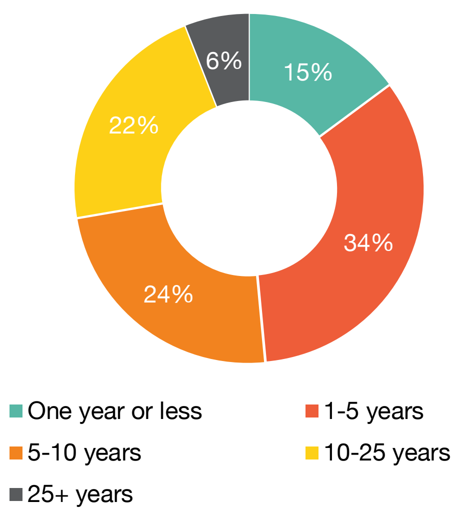
It is also interesting to note that, during consultations, artists indicated that access to business courses was limited in their artistic training. This highlights the need for additional business training both for artists with degrees in their practice and for those without.

It would be interesting to investigate if the percentage of self-taught artists is higher among English speakers and if self-taught artists need specific training or pathways to gain better recognition for their expertise. Indeed, in some sectors, not having a relevant diploma might lead to difficulties in accessing grants or residencies.

Figure 5 indicates how long the surveyed artists have been producing work with a view to monetize. The results reveal that many artists composing the sample have limited experience in this regard. Indeed, close to half of them (49%) have been doing so for 5 years or less.

The amount of time participants have been producing work with a view to monetize raises questions. It's low, whereas the sample is not mainly composed of young people. One clue given by YES's experts is that many artists spend the first part of their careers in other sectors and then decide to pursue their dreams of earning a living from art. In such cases, it is important to establish means of support to help artists succeed and face this challenging career change.

FIGURE 5
Distribution of participants according to number of years practicing art with a view to monetize



FINANCIAL ASPECTS OF THE ART PRACTICE

Participants' Revenue Sources

In 2021, the majority of the study's participants expressed that their art business revenue was under $5,000, and 36% cited it as between $5,000 and $29,999 (Figure 6). None of the participants observed a revenue above $250,000.

The majority of participants (65%) indicated that 50% or less of their income was from art-related practices, whereas only a quarter of the participants made their living mainly from artistic work (Figure 7).

Participants' arts revenues came primarily from freelancing (52%), selling original works and prints (51%) or teaching (25%) (Figure 8). These results might be linked to visual artists being highly represented.

FIGURE 6

Art business revenues for 2021 (grants included)

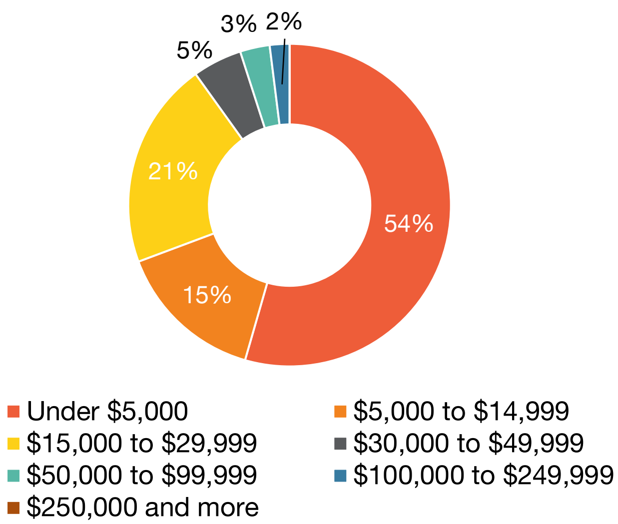


FIGURE 7

Percentage of income earned from art practice

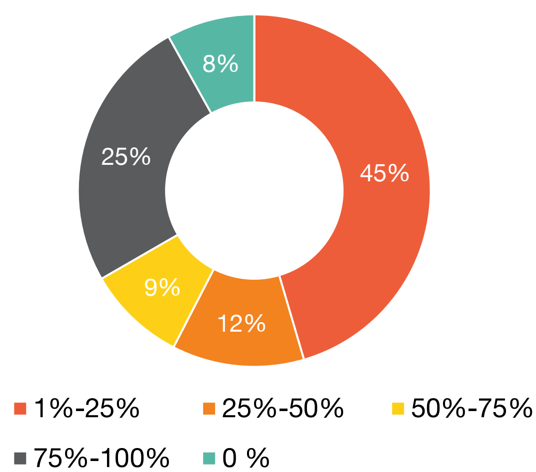
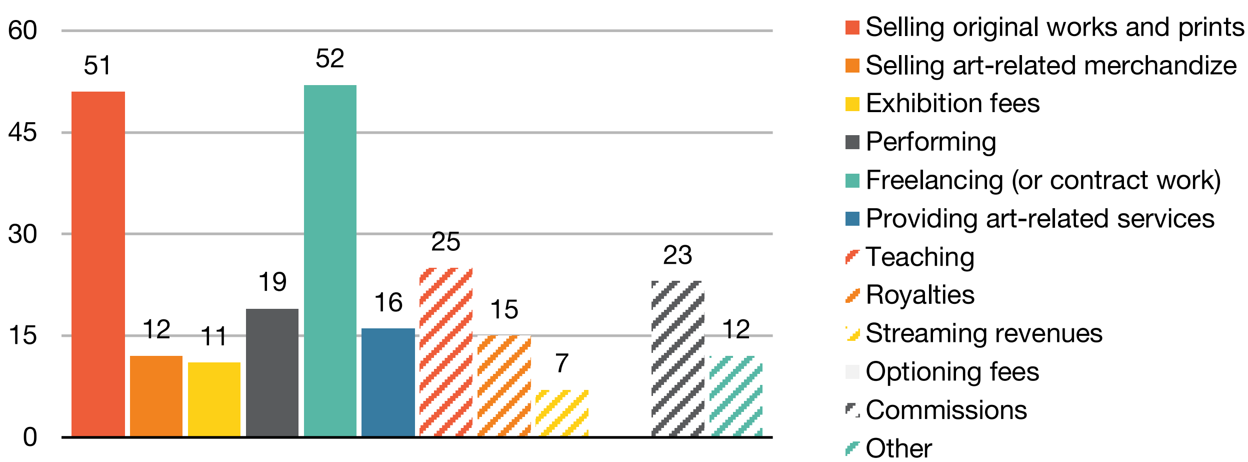


FIGURE 8

Distribution of participants arts-related revenue streams (in %)



- These results confirm the sociodemographic portrait raised in Section 2. The revenue earned from artistic practice is particularly low. We do not have the total income earned by each artist (including non-art related sources), but the information provided suggests that some respondents may live with an income close to the poverty line or that their artistic practice is not a sustainable business at this time.

- As was the case in the RAAV and FDC study (2022), arts-related revenue is the main source of income for only a minority (35%) of the respondents.

Participants' Financial Know-How

A majority of respondents indicated that they do track expenses and measure profits (48%), at least sometimes (35%) (Figure 9).

However, when it comes to planning and targeting, only 13% of participants are achieving more than half of their financial goals (Figure 10). Moreover, 43% said that they did not set goals this year, with a further 8% expressing that they do not know if their goals were achieved.

FIGURE 9
Distribution of participants based on whether they track expenses and measure profit

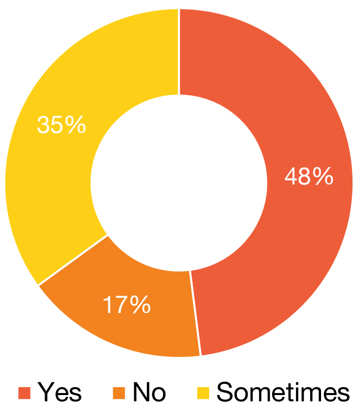


FIGURE 10
Distribution of participants based on the percentage of financial goals achieved for their business / art practice

+ The results around participants' financial routines suggest that financial planning is not clear for many of them. Perhaps certain artists do not consider the financial aspects of their work when setting goals. Also, COVID-19 might have made it harder for artists to project their earnings.

+ It would be useful to provide training on how to track expenses, measure profits and set goals. This could help artists better attain desired revenues as they would understand their profit margins and the number of units to be sold to break even or make a profit. This could even help artists make decisions on what art they might need to produce. Financial goal setting, on the other hand, would allow them to take an active role in revenue generation and to assess if their actions are aligned with their desired results.

Participants' Art Business Perspectives

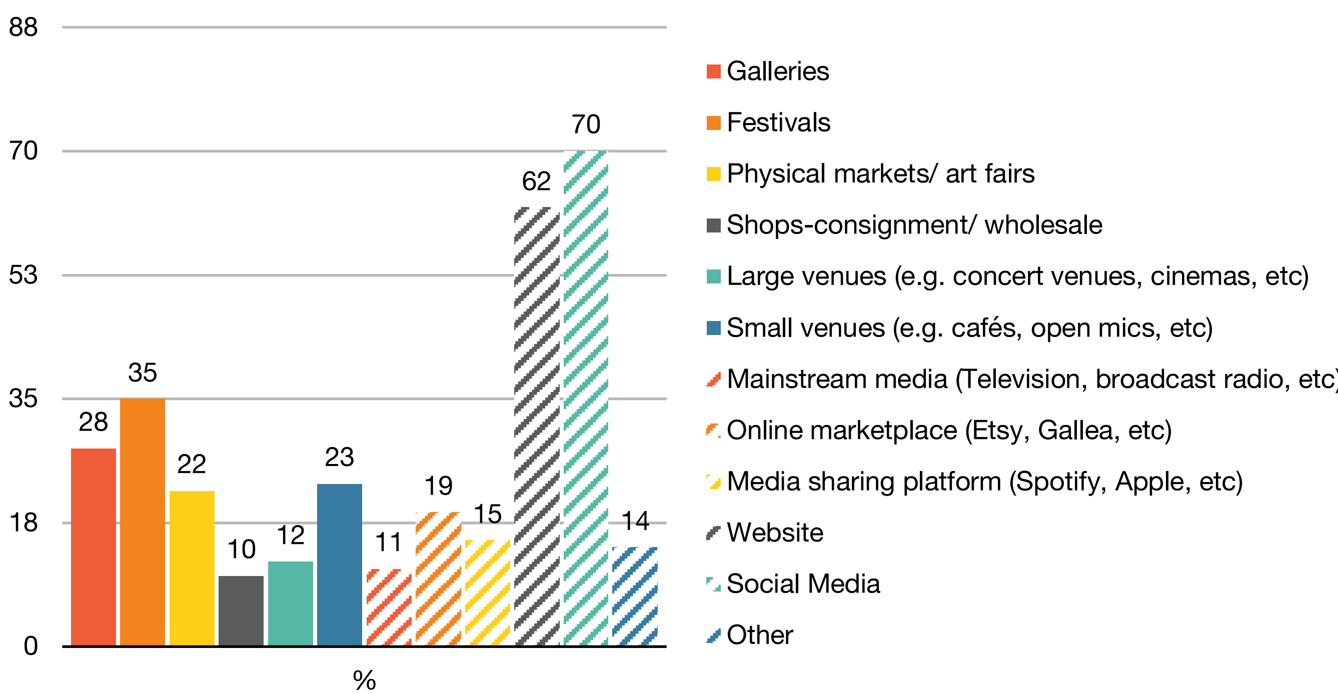
Respondents shared that their next step in business development is mainly linked to finances: 27% are interested in increasing sales, and 18% are seeking to obtain a grant or other funding. 12% express their next step as obtaining representation.

Regarding promotion, 42% of participants state that their marketing and promotional efforts bring them new business. However, 26% have no idea of the impact of their actions and 32% consider that their actions have no results.

Respondents mainly present their art on their personal online platforms (social media: 70% and website: 62%). To a lesser extent, they also present their work in festivals (35%) and galleries (28%). Naturally, these results might be impacted by the COVID-19 situation, as access to physical spaces to present art has been limited for the last 2 years.

Online media, such as marketplaces (19%) or media sharing platforms (15%), are not as popular (Figure 11).

FIGURE 11
Distribution of participants based on where they present their art



SKILLS AND SUPPORT NEEDED

Participants' Skills

The skills that participants are most confident with seem to be directly linked to their artistic work (Figure 12). Indeed, they expressed being very or fairly confident in describing their art (68%, with 20% declaring to be very confident) and in managing their production time (50%). Those two skill categories were the only ones where at least half of the participants felt confident.

We can underline that the participants are particularly not confident in getting representation (82% are not so or not at all confident), in connecting with buyers regionally (74%) or locally (66%) or in getting funding (69%).

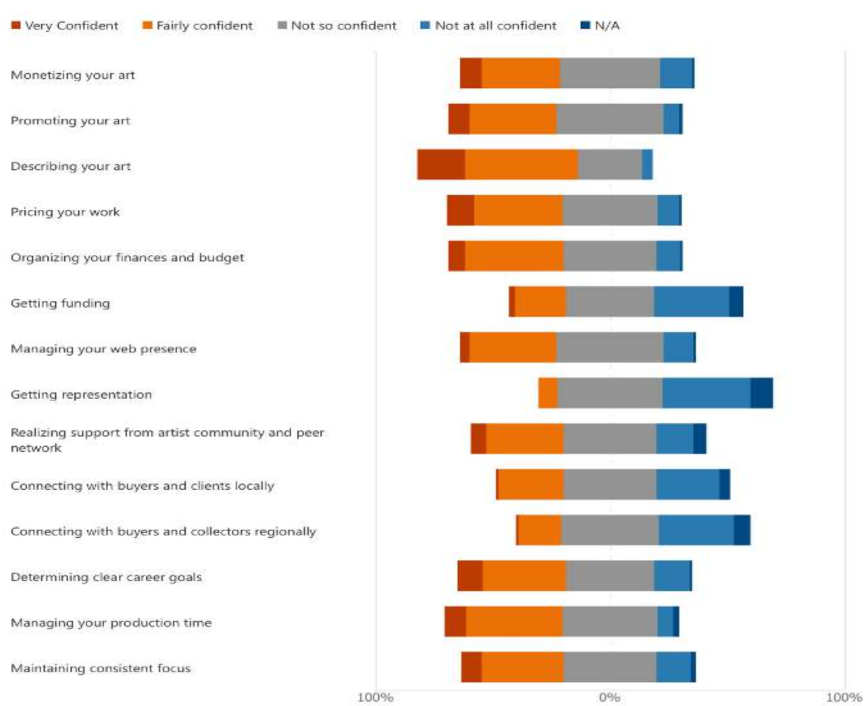
The question of marketing and communication seems to also be an issue as many of them are not at all or not so confident in managing their web presence (58%) or promoting their art (52%).

Regarding financial skills, it is evident that many do not feel fully confident. Monetizing their art is an issue for 56% of participants. They have a slight increase in confidence around organizing their finances and budgets and pricing their work. However, 52% do not track their expenses or only do it some of the time.

Additionally, 55% of respondents felt a lack of confidence in finding support from the business community and peer networks. Finally, the question of maintaining consistent focus is also an issue for 54.5% of participants.

FIGURE 12

Distribution of participants based on level of confidence with art business skills



Regarding digital marketing skills (Figures 13 and 14), the ones considered the most useful were those where participants also claimed the most expertise:

+ Internet navigation: 94.5% think that this skill is useful or essential and 87% claim to be good or excellent at it.
+ Using social media: 92% consider this skill as useful or essential and 50% rate themselves as good or excellent at it.
+ Website building from a template: 89% value this skill as useful or essential and 63% rate themselves as good or excellent at it.
+ Photo/video editing: 84.5% estimate this skill as useful or essential and 51% indicate they are good or excellent at it.

On the other side, E-commerce and using distribution platforms were two skills deemed as quite useful (74.5% and 70% consider them useful or essential) but in which few participants declared having expertise (27% and 18% express having excellent or good skills).

FIGURE 13
Distribution of participants based on their digital marketing skills

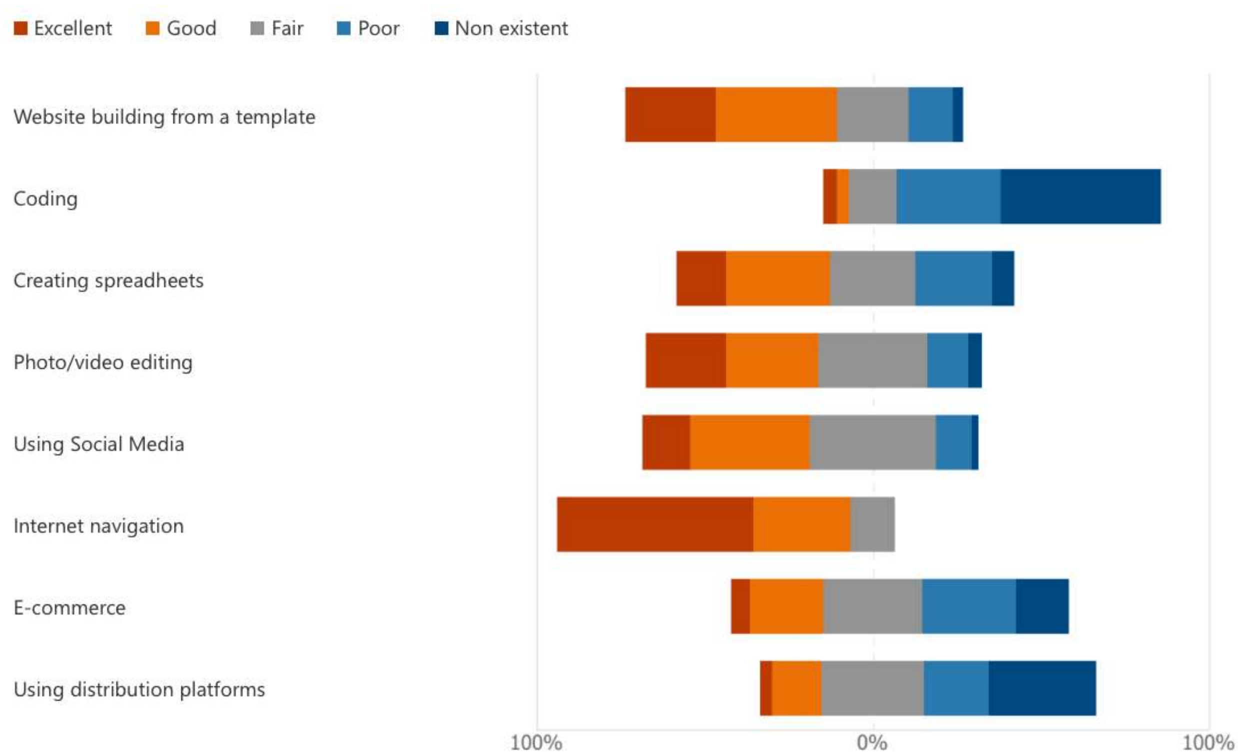
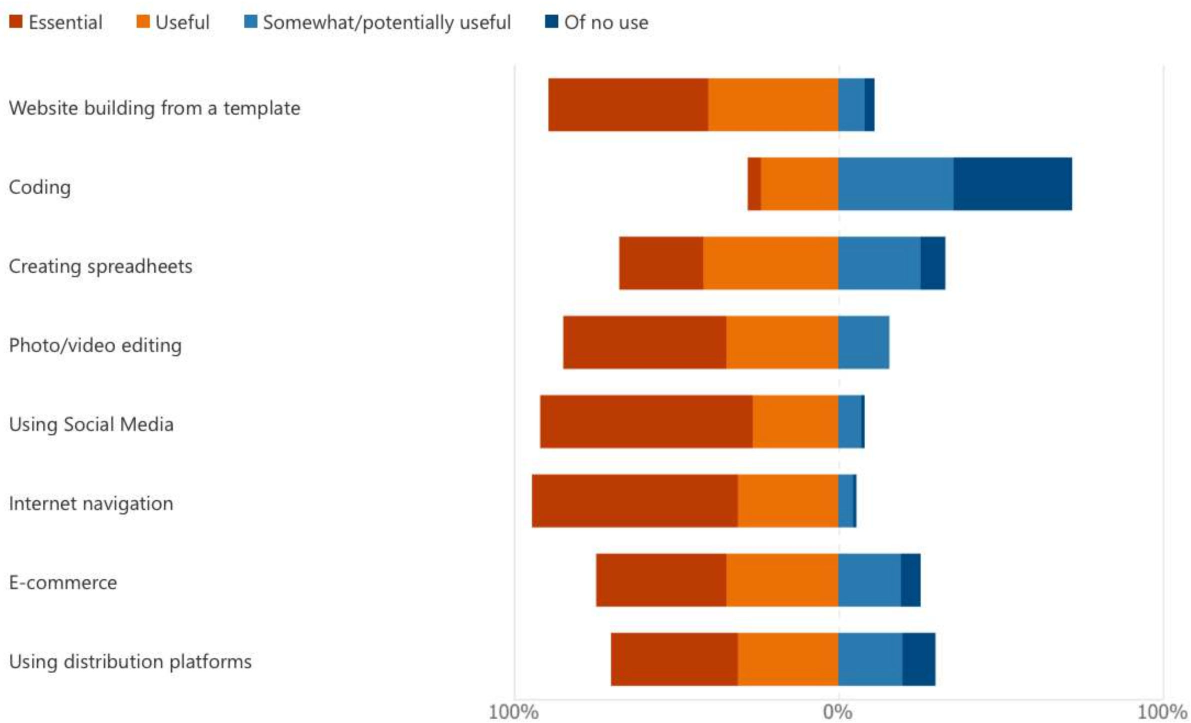


FIGURE 14
Distribution of digital marketing skills based on their perceived usefulness



- There is a need for training in E-commerce and using distribution platforms as participants do not feel confident in using them but judge them to be useful.
- Due to COVID-19, artists may have had to adapt to the use of platforms quickly and without adequate training.
- Participants expressed a deep need for networking and a lack of confidence in this skill. The pandemic has made networking more difficult, and participants are now eager to be matched with mentors, for example, or "industry players".
- One discrepancy draws our attention: respondents expressed feeling confident in describing their art but not in promoting or selling it. This leads us to ask if artists really know how to describe their art effectively and adapt their discourse to different audiences and customers.

Figure 15 highlights training topics considered as useful or not by participants. We can observe that most of the proposed subjects are considered beneficial by a large majority of respondents.

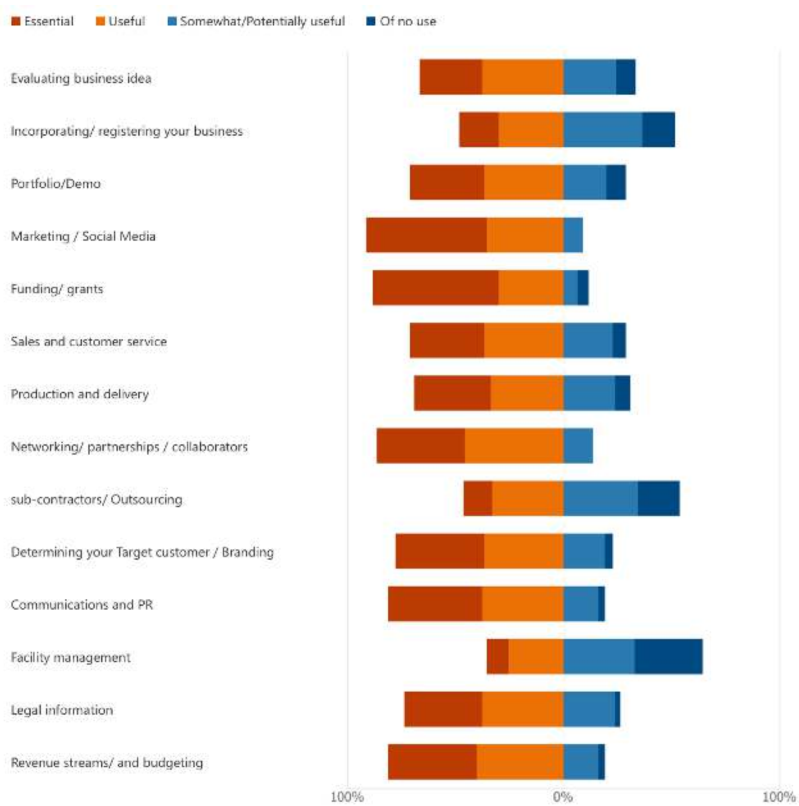
More specifically, some contents are judged to be particularly useful:

+ Marketing and social media (91% evaluate this topic as essential or useful)
+ Funding and grants (88%)
+ Networking, partnerships, and collaborators (86%)
+ Revenue streams and budgeting (80.9%)
+ Communications and PR (81%).

Comparatively, facility management[4], subcontractors and outsourcing[5] or incorporating and registering your business[6] are less popular themes among participants.

FIGURE 15

Training topics based on their perceived usefulness for participants



4 64.5% of participants consider this as potentially useful or of no use.

5 54% of participants estimate this as potentially useful or of no use.

6 52% of participants evaluate this as potentially useful or of no use.

Participants Access to Services and Resources

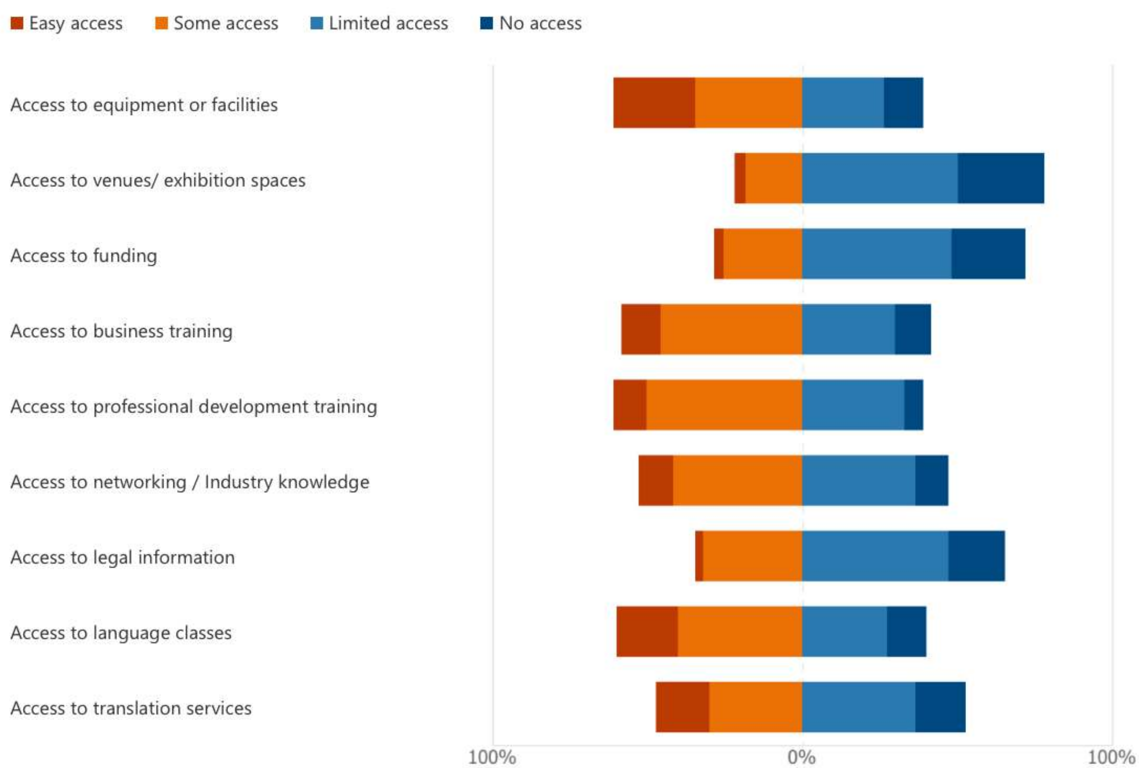
The most difficult resource for participants to access were venues and exhibition spaces (Figure 16). Indeed, 78% of respondents shared having difficulty, and among them, 28% declared having no access at all. Funding[7] and legal information[8] were also perceived as difficult to access. It's notable that in each category listed below, some participants expressed having no access at all.

However, about 60% of participants considered having some or easy access to language classes (60%), professional development training (61%) and equipment or facilities (61%). Slightly more than half of participants considered it quite easy to access business training (58,9%). This number might be skewed by YES clients (YES offers business training for artists) composing most of the sample surveyed.

We also surveyed participants on their production habits. To the question "where do you practice or produce your art", a great majority answered "from home" (89%) or "in a studio" (35%).

FIGURE 16

Level of access to services as perceived by participants



7 71.8% of participants share having limited or no access to this service.

8 65.5% of participants express having limited or no access to this service.

- The question of funding clearly appears as an issue. Seeking funding is one of the skills that participants are not confident in, but which most consider essential. The issue of funding was also highlighted in the question about access. As participants face issues around making a living from their artistic business, they might perceive arts funding as a way to sustain themselves. However, skills related to marketing, sales, and customer service are less sought after. Perhaps participants see themselves developing their practice around obtaining funding rather than selling their art. This point would be interesting to investigate further.
- Most artists work from home. Is this by choice or because they do not have other options? Is it linked to the COVID-19 situation? It would be interesting to explore if more access to production space helped artists achieve better working conditions.

Participants' Own Interpretations Around the Reasons for Lack of Access

In their comments, the participants' first explanation for barriers to access was COVID-19. Some of them also perceived seeking support services as time-consuming, difficult, and demanding. They already seemed discouraged before beginning their research. They expressed feeling lost and not knowing where to seek information.

Others expressed a belief that they needed to be part of a community - of which they felt excluded - to access advice, services, and funds. For example, certain participants felt that service offerings were more prevalent for younger artists. Respondents also perceived further barriers, for example lacking funds to pay for services or the difficulty to access services in the regions. Finally, language was an issue; some expressed a lack of services in English, while others spoke of not knowing how to get French classes or having difficulty attending them.

- The fact that there are many immigrants among English-speaking artists might have an impact on their perception of access to services. Comments display that participants have difficulty understanding how the system works, where to find information, or who can help them. Some do not feel they are part of the network and face discouragement trying to access services. We would suggest further investigating the situation of immigrant English-speaking artists in Quebec in order to better understand their experience and the possible barriers they may face.

Participants' Preferences in Trainings

When observing how participants prefer to be trained, some trends emerge. They appreciate one-on-one coaching (38%) or activity based / experiential training (32%). Other formats, such as lecture (9%), study-group and peer work (10%), self-guided learning (6%), or recorded instruction (5%), are less popular.

Regarding frequency and flexibility, they prefer ongoing coaching (71%), one-off workshops (65%) or training on a per-need basis (61%). Notably, a little over half of participants are ready to attend a class once a week (52%). In any case, for 90% of respondents, the duration needs to be less than 3 hours.

In regard to who delivers the training, participants are more likely to turn to peer communities (74%) or industry experts (75%) for professional development.

Finally, only 5% would like to receive training in person, whereas 36% would prefer online, and 59% through a combination of both.

+ Participants seem to prefer receiving trainings which are flexible and specific to them (on demand, coaching, one-off workshops).
+ On the other hand, a surprisingly high percentage of participants (52%) are ready to be deeply involved in a program and attend a class once a week.
+ Whereas we hear a lot about “Zoom fatigue,” most participants prefer to receive training online or through a combination of online and in person.
+ These results might indicate that we are facing a change in training approaches: people are now used to staying at home and might be willing to come in person only if it offers an added value (ex: meetings with peers, gatherings within the community, etc.).

IMPACT OF COVID-19

Participants expressed experiencing challenges due to COVID-19 (Figure 17). The one shared by most participants was having to face lockdowns and the closing of art exhibitions and performance spaces (61%). Noticeably, 48% of participants expressed that they experienced a decrease in productivity and motivation. They also seem to have been impacted by travel restrictions (45%), limited access to resources (38%), and the adaptation of their practice to a digital or web platform (35%). On the other hand, the question of vaccine mandates was only considered an issue for 7% of participants.

FIGURE 17
Main challenges participants experienced due to COVID-19

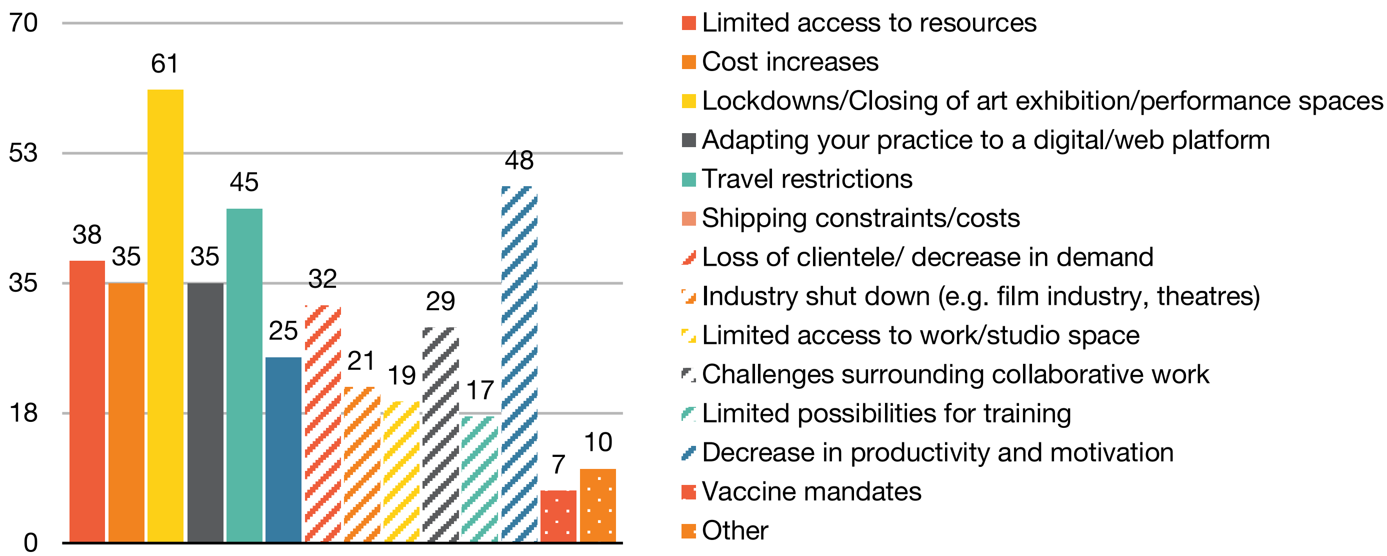
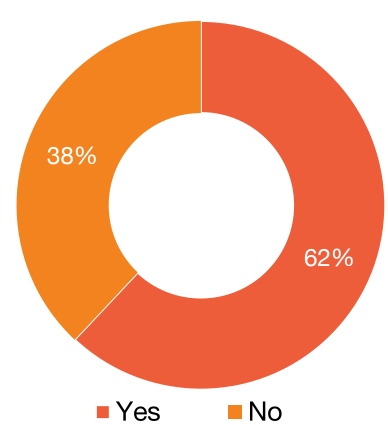


Figure 18 reveals that most participants (62%) experienced a change or have been forced to adapt their practice due to COVID-19. Clearly, many of them had to switch to online work. This either took the form of video meetings, remote teaching, or presenting their work online instead of in a live performance or exhibition format. Respondents spoke of having tried to improve their digital skills and increase their online presence, but many expressed having difficulty networking and promoting their work this way.

FIGURE 18
Distribution of participants based on changes in their practice due to COVID-19



COVID-19 also had an impact on production. Some stopped producing, sometimes because they had to take care of their family or because they decided to focus on activities more easily practiced remotely, such as teaching. Others had to change their medium or the kind of art they were producing. Some of the respondents, for example, could no longer access their workspace or had to switch to solo work as they were not allowed to gather or produce collaboratively. In some cases, artists decided to focus more on the creation aspect of their work as they could no longer find ways to present it.

A third (33%) of the respondents estimated that this change in their practice would continue for a longer period, while 14% expected to be able to return to their former methods (Figure 19). Figure 20 illustrates the way participants' revenues were impacted. 35% of respondents saw their revenues decline, 25% saw them increase,19% expressed no change, and 21% didn't know.

FIGURE 19
Distribution of participants based on whether they plan to maintain their changes after COVID-19

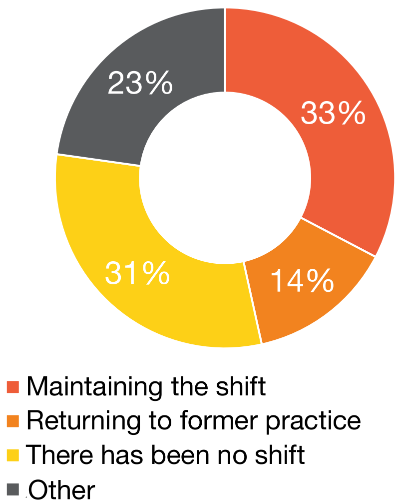
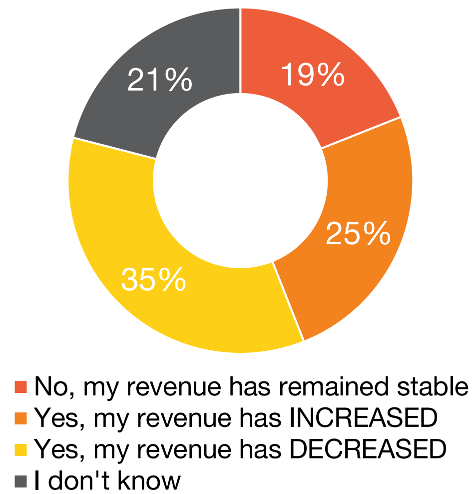


FIGURE 20
Distribution of participants according to their perceived changes in art revenue due to COVID-19



+ Clearly, the COVID-19 crisis had an impact on the way artists produce work and on their revenues.

+ Participants tried to develop an online offer and be visible on the Internet. This would explain why they considered social media as so important in the preceding section.

+ The effect of the pandemic did present a range of results where 66% experienced decreases in revenue, while 44% experienced no revenue change or an increase, but questions arise around the potential loss of opportunities and momentum caused by the pandemic over the past two years and how this might affect artists' long-term career trajectories.

+ Respondents confirm that government mandated closures have been a challenge for them. The working conditions of some artists deteriorated because they lost access to key facilities or collaborative possibilities.

+ Respondents expressed the need for help in networking with peers or people that could help them to further develop their business.

+ The question of mental health also arose: 48% of participants reported a decrease in productivity and motivation. It would be important to check periodically on the mental health of artists and focus on services to help them in this area.

SECTION 4: CONCLUSION

This exploratory study aims to give insights into a better understanding of the business support needs for English-speaking Artists in Quebec. It raises the necessity to go deeper to investigate their situation within the province and the potential long-term effects that COVID-19 might have had on the arts sector. The study also highlights the importance of skills development for artists to be able to reach their potential and fully contribute to the Quebec economy.

Similarly to all other research on the financial situation of artists in Quebec, one key result we have found is that average incomes in the arts are particularly low, and this is even more the case for English-speaking artists. A lack of understanding on how to find resources may increase this population’s vulnerability and diminish their potential contribution to the community and to the sector.

Emerging artists of all ages have expressed a need for developing new skills around business development. Indeed, numerous artists highlighted that business and entrepreneurial skills are not always taught in art schools. In artists’ first few years of practice, there is a focus on production and gaining visibility, but not on understanding the basics of commercialization.

An absence of business know-how appears to slow down artists’ potential career growth and their ability to make their practice self-sustaining. As various industries, including the creative ones, continue to move more rapidly, so does the market value of skills. The importance of up-skilling in the areas of marketing, financials, human resources, and operations is ever more important and relevant, especially as markets become expanded.

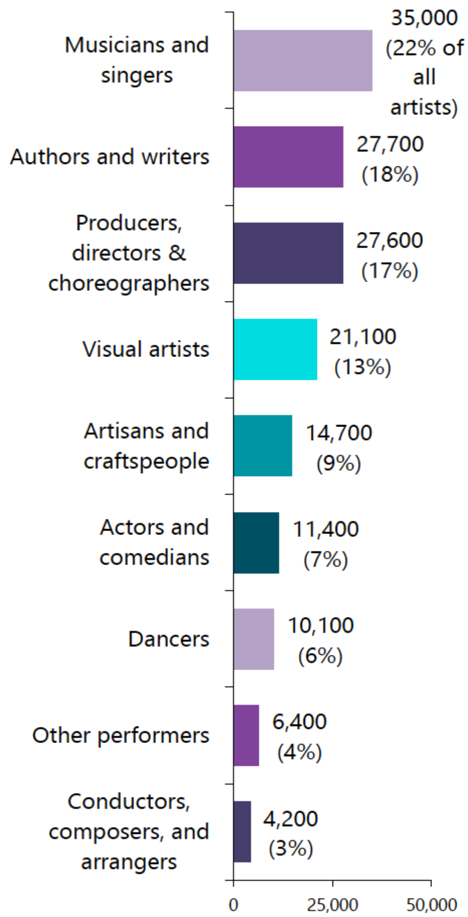
It is, therefore, important to ensure the continuous development of business-related skills for artists, beyond schools and throughout their professional lives.

Learning opportunities and skills development can come in many forms, but the key elements to keep in mind are offering options, guided support and an environment that is safe, reliable, and representative. It is important that investments be made in institutions with a record of supporting skills development in the arts and understanding the journey of this community.

APPENDIX

APPENDIX 1
Artists by occupation in Canada

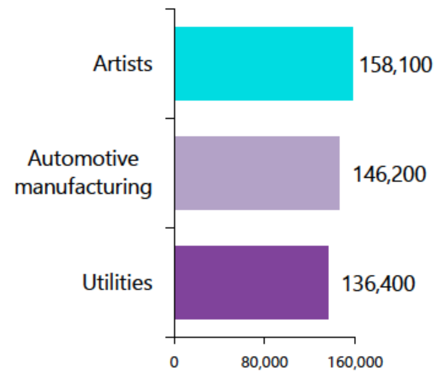
Source: Hill (2019, p.2)



Source: 2016 census custom data request

APPENDIX 2
Median individual incomes of artists, cultural workers, and all workers in Canada

Source: Hill (2019, p.3)



Source: 2016 census custom data request

APPENDIX 3
Anglophone and Francophone artists in Quebec by occupation

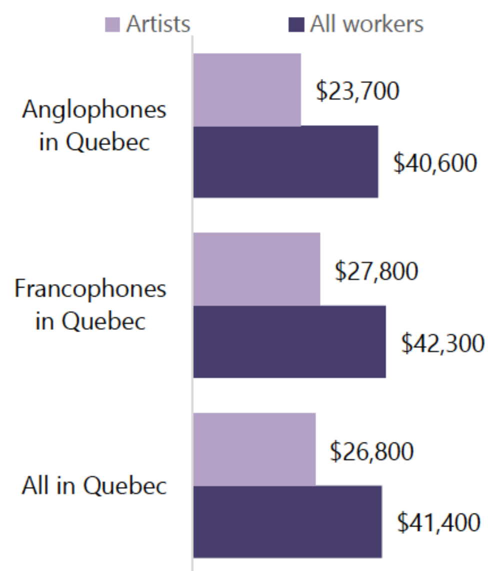
Source: Hill (2020, p.24)

Occupation	% of Anglo-phone artists	% of Franco-phone artists
Authors & writers	24%	13%
Musicians & singers	21%	19%
Producers, directors, choreographers & related occupations	16%	26%
Visual artists	13%	15%
Artisans & craftspeople	6%	8%
Dancers	6%	6%
Actors & comedians	5%	7%
Other performers	5%	4%
Conductors, composers & arrangers	3%	3%

Source: 2016 census custom data request.

APPENDIX 4
Median incomes of Anglophone and Francophone artists and all workers in Quebec

Source: Hill (2020, p.22)



Source: 2016 census custom data request. Income figures relate to the 2015 calendar year.

APPENDIX 5
Median income by occupation for Anglophone and Francophone artists in Quebec

Source: Hill (2020, p.24)

Occupation	Anglo-phone artists	Franco-phone artists	Cents on the dollar
Authors & writers	$41,700	$43,900	95¢
Musicians & singers	$17,900	$18,300	98¢
Producers, directors, choreographers & related	$40,500	$52,300	77¢
Visual artists	$18,300	$22,500	81¢
Artisans & craftspeople	$19,200	$20,500	94¢
Dancers	$18,500	$14,900	$1.24
Actors & comedians	$19,900	$26,900	74¢
Other performers	$16,000	$18,400	87¢
Conductors, composers & arrangers	$26,600	$25,200	$1.06
All artists	**$23,700**	**$27,800**	**85¢**

Source: 2016 census custom data request. Income figures relate to the 2015 calendar year.

APPENDIX 6
Average and median revenue of visual artists in Canada and Quebec

Source: Hill (2019), RAAV and FDC (2022)

	Visual artists in Canada in 2016 (Hill, 2019)	Visual artists in Québec in 2019 (RAAV and FDC 2022)	Visual artists in Québec in 2020 (RAAV and FDC 2022)
Average revenue	31,700 $	31,815 $	30,420 $
Median revenue	20,000 $	28,250 $	26,158 $

APPENDIX 7
Effects of the pandemic situation: comparison of visual artists' gross annual incomes in Quebec between 2019 and 2020 (current dollar)
Source: RAAV and FDC (2022)