

# Review of Pay and Conditions in the Performing Arts Sector and Music Industry 2022

## Key Findings

### Executive summary

#### Earnings in the arts and entertainment sector are down

The average weekly earnings for the Arts and entertainment sector in Q4 of 2022 was €582.36, 65% of the average for all employees. This is down by 1.8% compared to the same quarter in 2021. Just two other sectors saw a fall. Accommodation and Food Services saw a 4.5% increase.

National average hourly earnings for the arts and entertainment sector were down by 1.2% compared to the same quarter in 2021. All other economic sectors saw a rise.

91% of established artists and workers in the music industry and 88% of individuals working in the performing arts sector earned less than the national average weekly earnings.

Although average weekly earnings in the arts and entertainment sector were down by 1.8% compared to the same quarter in 2021, the Consumer Price Index rose by 7.8%.

#### Basic Income for the Arts

11% of individual respondents to the performing arts sector survey and 9% of those from the music industry said they had received Basic Income for the Arts in 2022. On average, those from the performing arts received €5,581 from the scheme and those from the music industry received an average of €4,297.

*“The artist's basic income would have made a massive difference to me as I entered 2023. It would have given me stability. Allowed me to plan. Freed me up from the many other non-artistic survival jobs that I constantly have to juggle and invest hours into. I can see the enormous difference it made to my friends who were selected for the scheme. A weight was lifted from their shoulders the day they received notification ... you could actually sense the physical change in them, when their daily financial worries were lessened.”*

Individual respondent from the performing arts sector

#### Recruitment crisis

79% of performing arts organisations and 65% of music industry enterprises that needed to recruit in the last quarter of 2022 reported that they encountered difficulties filling full-time, part-time, casual or freelance roles. The situation is likely to become worse with 32% of individual respondents to the performing arts survey and 34% of respondents to the music industry survey saying they are very or extremely concerned that financial pressures will force them to leave the sector in the next six months.

## Introduction:

### Aim

To benchmark pay and conditions within the performing arts and music sectors on the island of Ireland against other economic sectors and against previous surveys of the sectors so that Theatre Forum and First Music Contact can:

- advocate for the sector in a co-ordinated way
- enable employers to compare their pay policies with norms for their organisation type and sector area
- enable performing artists and musicians to price their work effectively
- design interventions to support the sectors.

### Methodology

Links to online surveys were sent to individuals, enterprises and organisations working in the performing arts sector and music industry. These were designed to gather quantitative and qualitative information about pay, conditions and career pathways in 2022.

135 individuals working in the performing arts, 323 individuals working in the music industry, 38 music industry enterprises and 90 festivals, production companies and venues from across Ireland responded.

#### About the individual respondents

90% of individuals responding to the music industry survey said they created and/or performed music in 2022 but the majority also fulfilled other roles within the industry. 59% of individual performing arts respondents said they undertook roles directly involved in creating and/or performing theatre, dance, music, comedy, puppetry, circus and street arts and aerial dance.

53% of the individual respondents to the music industry survey and 50% of those to the performing arts survey were from outside Dublin.

Respondents were at various stages in their careers.

12% of individual respondents to the performing arts survey had been working in the sector for five years or less and half for more than 12 years. A quarter had been working in the sector for 24 years or more.

11% of individual respondents to the music industry survey defined themselves as aspiring to be professional musicians, 49% as emerging and 34% as established in their careers.

#### About the organisations responding

Sixteen different types of music industry enterprise responded with music management companies and tour/production/event management companies best represented. Turnover ranged from €3,000 to €15.2m.

14 festivals, 20 companies and 51 venues responded to the performing arts survey.

## Definitions

*Average* refers to the arithmetical mean unless otherwise stated. The analysis also uses *medians* – the mid-point in the data where half of the responses are higher and half lower – as the mean can be distorted by a small number of outliers which are much higher or much lower than the rest of the responses.

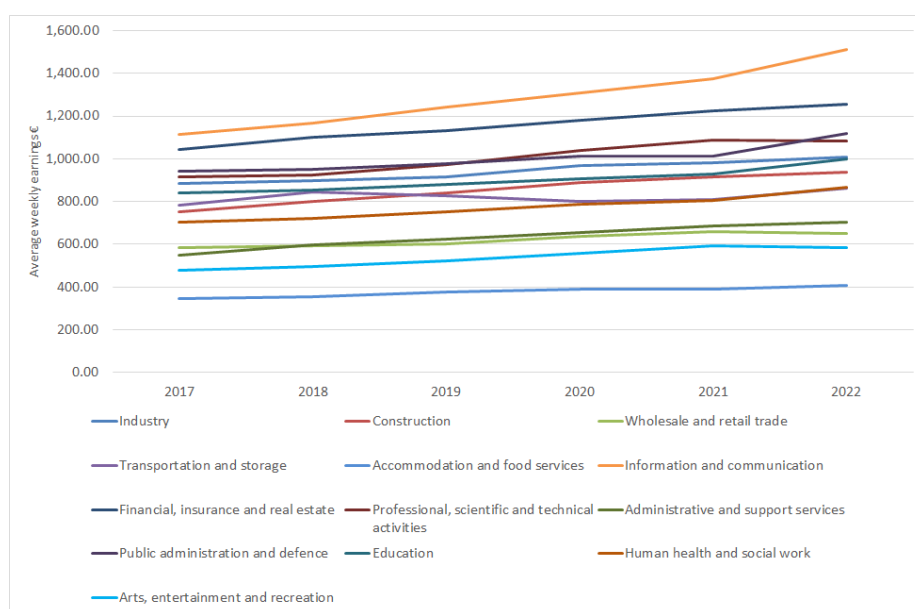
## Income

### Weekly income

#### Official national data

The Central Statistics Office's Earnings and Labour Costs survey indicates that the national average weekly earnings for all employees in the last quarter of 2022 was €900.26, up 4.2% compared to the same quarter in 2021.<sup>1</sup>

Figure 1: Quarter 4 average weekly earnings by economic sector 2017 - 2023



The average weekly earnings for the Arts and entertainment sector was €582.36, 65% of the average for all employees. This is down by 1.8% from €592.75 in the last quarter of 2021. Just two other sectors saw a fall, both smaller than for Arts and entertainment. (Wholesale and retail trade -1.1%, Professional, Scientific and Technical activities -0.3%). Accommodation and Food Services saw a 4.5% increase.

Although average weekly earnings in the arts and entertainment sector were down by 1.8% compared to the same quarter in 2021, the Consumer Price Index rose by 7.8% in 2022 compared to 2021.

<sup>1</sup> This includes regular earnings, overtime earnings and irregular earnings and is based on all enterprises in the Republic of Ireland with 50 or more employees and a sample with between three and 49 employees. <https://www.cso.ie/en/releasesandpublications/ep/p-elcq/earningsandlabourcostsq32022finalq42022preliminaryestimates/>

Overall, the private sector showed a 2.0% increase, and the public sector had a backdated pay increase of 3% which resulted in an uplift of 10.8%.

Figure 2: Quarter 4 average weekly earnings in the public sector compared to the arts and entertainment sector 2017-2023

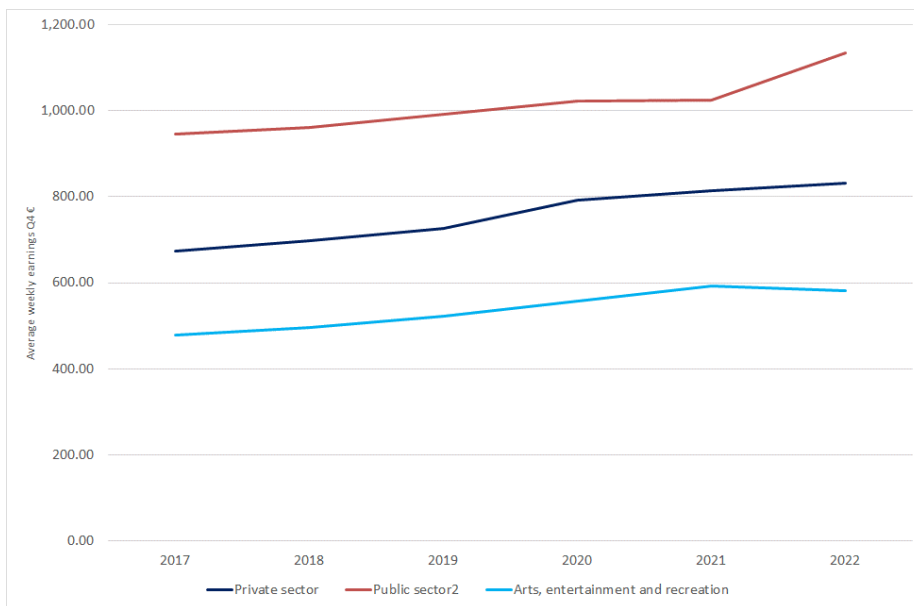
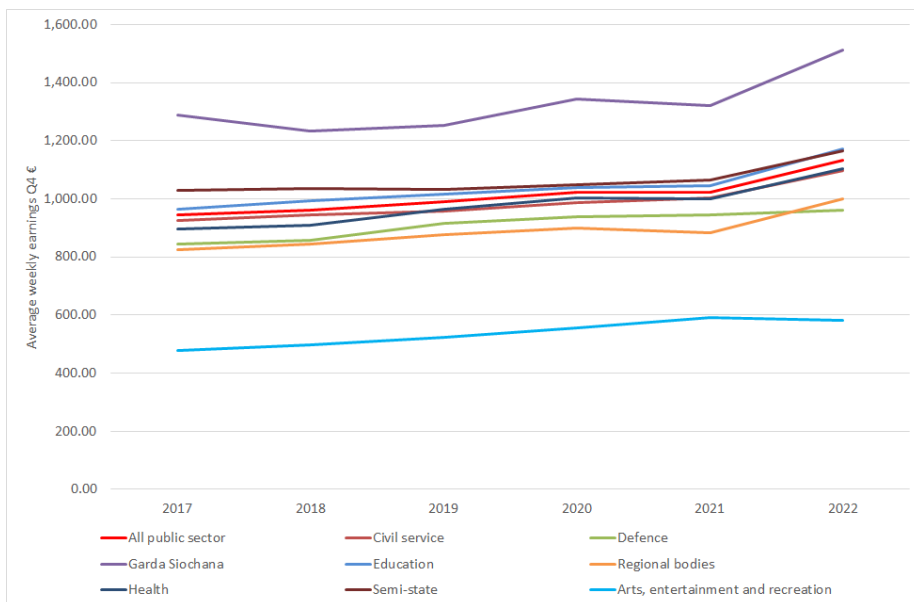


Figure 3: Quarter 4 average weekly earnings in the public sector by subsector compared to the arts and entertainment sector 2017-2023



Enterprises with less than 50 employees saw a fall of 0.3% in weekly earnings, while larger enterprises saw uplifts 1.9% in companies with 50-250 employees and 6.7% in companies with more than 250 employees.

The five economic sectors with the lowest average weekly earnings are:

€

Accommodation and food services	408.63
Arts, entertainment, recreation and other service activities	582.36
Wholesale and retail trade; repair of motor vehicles and motorcycles	652.08
Administrative and support services	703.99
Transportation and storage	862.62

### Performing arts and music

Note that, as the following are medians, by definition half of respondents earned less.

Median weekly income from all sources for the individual respondents to the performing arts survey was €596.15. Outside Dublin this was €576.92 and in Dublin it was €622.10.

Median weekly income from all sources among the music industry respondents was €557.69. Outside Dublin this was €563.79 and in Dublin it was €557.69.

### Career stage

Career stage affects income. The average weekly income from all sources for respondents who have worked in the performing arts for less than eight years is €515.32 and for those who have worked between nine and 13 years is €580.30. This compares to €605.20 for those who have worked between 14 and 23 years and €653.62 for those who have worked for more than 23 years in the sector.

In the music industry, the impact of career stage is different. More established artists earn less than those starting out because they have left jobs unconnected to their music and need to invest more to develop their careers. On average, aspiring artists and sector workers' weekly earnings from all sources was €713.12, emerging artists and sector workers €704.37 and established artists and sector workers €586.48.

91% of established artists and workers in the music industry earned less than the national average weekly earnings compared to 78% of all individual respondents.

88% of individuals working in the performing arts sector earned less than the national average weekly earnings.

### Comparison with national data for the arts and entertainment sector

50% of all individual respondents to the performing arts sector survey earned less than the national average weekly earnings in the arts and entertainment sector of €582.36.

57% of all individual respondents to the music industry survey earned less than the national average weekly earnings in the arts and entertainment sector of €582.36.

## Annual income

The median annual income from all sources for individual respondents working in the performing arts sector is €30,050. This ranges between €5,000 and €86,000.

The median annual income from all sources for individual respondents working in the music industry is €29,000. This ranges between €2,800 and €220,000.

## Hourly earnings

### Official national data

National average hourly earnings for all employees including regular earnings, overtime earnings and irregular earnings in the last quarter of 2022 was €27.72. For the arts and entertainment sector it was €20.35, down by 1.2% compared to the same quarter in 2021. All other economic sectors saw a rise in hourly earnings.

The five sectors with the lowest average hourly earnings are as follows:

	€
Accommodation and food services	15.33
Arts, entertainment, recreation and other service activities	20.35
Wholesale and retail trade; repair of motor vehicles and motorcycles	21.47
Administrative and support services	21.97
Transportation and storage	23.78

Figure 4: Quarter 4 average hourly earnings by economic sector 2017 - 2023

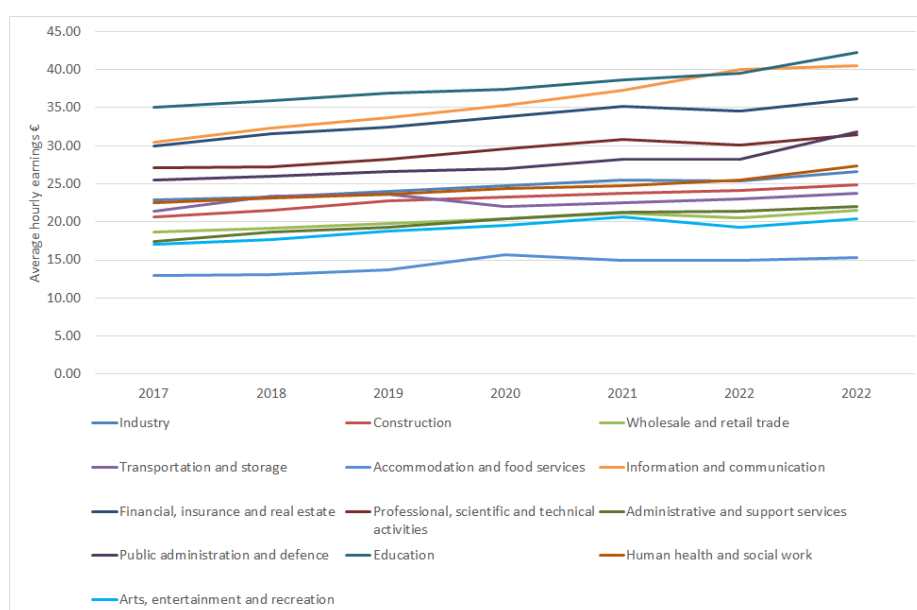
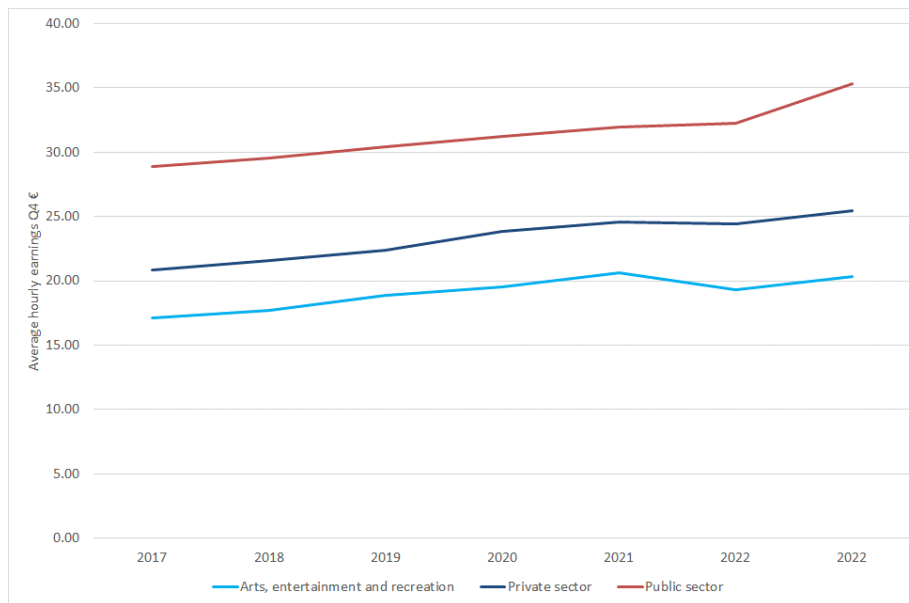


Figure 5: Quarter 4 average hourly earnings in the public sector by subsector compared to the arts and entertainment sector 2017-2023



### Performing arts and music

The median hourly earnings for the performing arts sector was €17.31. 72% of respondents earned less than the overall national average hourly earnings and 68% earned less than the national average for the arts and entertainment sector. 16% earned less than the national minimum wage of €10.50.

The median hourly earnings for the music industry was €15.00. 82% of respondents earned less than the overall national average hourly earnings and 78% earned less than the national average for the arts and entertainment sector. 29% earned less than the national minimum wage of €10.50.

### Income from the performing arts and music

#### Music industry

On average, individual respondents to the music industry survey in paid work earned €14,553 from work related to their music in 2022. The median, however, is €5,500 as earnings from music-related work ranged vastly from a loss of €4,585 to €220,000.

*“I feel like, in the original music industry, it costs more to be involved than you make back. You are paying for distribution, recording costs, PR, Facebook ads, etc. and you only make back on streams or merchandising but it's hard to balance out the thousands of euros it costs to release music.”*

Individual respondent from the music industry

38% earned more than 80% of their total annual income from music-related work but 41% earned less than 20% from music-related work. 34% earned all their income from music, 13% earned none of their income from music.

*“With a large number of part-timers/hobbyists on the gigging scene, making a full-time living as a performing musician is problematic, especially when the running costs are factored in - transport, maintaining web presence, instrument and equipment purchase/ maintenance. There will always be somebody doing it as a hobby who's willing to accept an unrealistically low fee.”*

Individual respondent from the music industry

The median proportion of total annual earnings from all sources derived from music-related work is 38% with no difference between those based in Dublin and those based elsewhere.

### Performing arts sector

On average, individual respondents to the performing arts sector survey in paid work earned €18,383 from work related to their creative practice in 2022. The median is €15,000 with earnings from arts-related work ranging from €880 to €85,000.

45% earned more than 80% of their total annual income from performing arts-related work but 26% earned less than 20% from performing arts-related work. 38% earned all their income and 16% earned none of their income from performing arts-related work.

### Basic Income for the Arts

11% of individual respondents to the performing arts sector survey and 9% of those from the music industry said they had received Basic Income for the Arts in 2022.

On average, those from the performing arts received €5,581 from the scheme and those from the music industry received an average of €4,297.

*“The artist's basic income would have made a massive difference to me as I entered 2023. It would have given me stability. Allowed me to plan. Freed me up from the many other non-artistic survival jobs that I constantly have to juggle and invest hours into. I can see the enormous difference it made to my friends who were selected for the scheme. A weight was lifted from their shoulders the day they received notification. They weren't even fully aware how they were carrying that weight up to that point, but you could actually sense the physical change in them, when their daily financial worries were lessened.”*

Individual respondent from the performing arts sector

### Comparison with 2019

19% report a reduction in their income from the performing arts in 2022 compared to 2019 (with 13% reporting a substantial reduction). 30% report a substantial increase. Just 11% of



these respondents were in receipt of Basic Income for the Arts so this has had only a limited impact on this comparison.

The picture is different within the music industry with 16% reporting a substantial reduction in their income compared to 2019 and just 15% reporting a substantial increase. Again, Basic Income for the Arts has had only a limited impact with just 8% of these respondents receiving it.

## Other support

33% of individual respondents in the music industry relied wholly on their earnings from the sector (including teaching related to their creative practice or the industry) compared to 48% in the performing arts sector.

16% of those in the music industry and 27% of those in the performing arts rely on income from another member of their household, family or friends.

Figure 6: In 2022, was your work in the music/performing arts industry made financially possible by:

	Music Industry €		Performing arts €	
	No. of respondents	% of respondents	No. of respondents	% of respondents
Income from work outside your sector	72	46%	26	20%
Income from another source in 2022 e.g., another member of your household, family or friends?	25	16%	36	27%
Social welfare payments or benefits	36	23%	22	17%
Housing benefits e.g., HAP or Rent Supplement	3	2%	3	2%
None of these	51	33%	63	48%
Can't remember	1	1%	2	2%
Base: no. of responses	156		132	
No response	167		3	

33% of those in the music industry also earn income from teaching related to music or the music industry. It appears, however, that it has become more difficult for musicians to supplement their income through teaching:

*“Lack of permanent [teaching] contract Lack of scalable contract Hours can rise OR fall, depending on student numbers No possibility of progression in current University role No pension No sick pay No payment on Bank Holidays Unemployed in Summer months Work and policy dictated to me from above - no scope to improve or make suggestions for positive change Have to teach most of the week just to pay the bills, not much time or energy left for creativity, promotion, etc. The Teaching Council do not recognise any of my qualifications (incl. PhD), so cannot work in any school that requires a Teaching Council number.”*

Individual respondent in the music industry

## Portfolio careers

In order to earn enough to live on, individuals working in the music industry and performing arts sector have developed a range of skills sets and experience so they can fill a wider range of roles within their sector.

58% of individuals responding to the music industry survey filled more than one role within the industry in 2022. 90% said they created or performed music in 2022 but, on average they also fulfilled three other roles within the industry. The 10% who did not create or perform fulfilled an average of 2.1 roles.

59% of individuals responding to the performing arts survey said they were directly involved in creating and/or performing but they also fulfilled other roles, on average 3.5 roles within the performing arts.

39% of individuals in the performing arts sector and 22% of individuals from the music industry said they worked in other areas of the cultural sector, for example teaching not related to their creative practice, project management etc.

## Financial security

### Pension

35% of individual respondents to the music industry survey and 56% of the those responding to the performing arts sector survey earned more than the threshold for Pay Related Social Insurance. Of these 63% in the music industry and 67% in the performing arts did not make any pension contributions in 2022.

67% of organisations and enterprises in the music industry did not have a pension/PRSA arrangement in place for staff at the end of December 2022. Half of those with an arrangement in place did not make contributions on behalf of employees.

43% of performing arts organisations did not have a pension/PRSA arrangement in place for staff at the end of December 2022. Just 24% have a pension scheme and make employer contributions.

### Health insurance

51% of individual respondents to the music industry survey did not have health insurance in 2022. Of those who did have health insurance, 29% were not the policy holder.

53% of individual respondents to the performing arts survey did not have health insurance in 2022. Of those who did have health insurance, 36% were not the policy holder.

### Maternity Pay

Just two music industry enterprises said they provide a top up to state maternity benefit, one to full salary (an education institution) and one to a proportion of salary (a music management company). An additional respondent said they didn't know what was provided.

31% of performing arts organisations said they provided a top up to state maternity benefit. Half of these were to full salary and half to a proportion of salary.

### Paternity leave

34% of performing arts organisations said they offered paternity leave with all but two at 10 days. Of the two, one offers five days and the other 20.

Three music industry enterprises offer paternity leave, all at ten days.

## Difficulty in recruiting

*"All the skilled roles proved difficult [to recruit]."*

Performing arts venue

79% of performing arts organisations that needed to recruit in the last quarter of 2022 reported that they encountered difficulties filling full-time, part-time, casual or freelance roles. 72% found it difficult to fill technical roles (including wardrobe), 51% low paid administration or operational roles and 25% senior production roles (e.g., lighting or sound designers).

65% of the music industry enterprises that needed to recruit any full-time, part-time, casual or freelance roles in the last quarter of 2022 said they had difficulty filling the post. This encompassed 21 different roles with technical and production staff and crew, marketing and administrative roles particularly difficult.

The situation is likely to become worse with 32% of individual respondents to the performing arts survey and 34% of respondents to the music industry survey saying they are very or extremely concerned that financial pressures will force them to leave the sector in the next six months.

*"I am middle aged and live at home because I can't afford rent or a mortgage. There is seemingly no interest in improving my pay in my current role, despite me bringing a breadth of varied experience and skill that cover the workload of multiple employees on my tiny wage. I am overworked and feel undervalued, I see no option for personal or professional career development, and now realise that if I am to improve my life situation, I must consider leaving this sector and taking my skills and experience elsewhere. Something that is emotionally very hard to do, as I have put so much into the last decade but cannot financially or personally continue to do so."*

Individual respondent in the performing arts sector

### Longer hours and lower pay

Individual respondents to the performing arts survey report that the pressure on budgets caused by the cost of living increase which has impacted on touring in particular has resulted in smaller crews with senior members having to fill in for missing support roles.

*“There is a dearth of stage managers and producers, so it feels like the work is never-ending/it's hard to say no to projects because there is nobody else to take them on.”*

Individual respondent in the performing arts sector

*“I actually earn more when I work as a technical crew member working by the hour than as a Designer, especially because working as a Designer you spend more hours working in the creative field and also doing extra work when productions don't hire crew (e.g. Costume supervisor, costume crew, maintenance, prop making, etc.).”*

Individual respondent in the performing arts sector

## Barriers to entry

Although 29% of individual respondents to the performing arts survey got their first paid job through an open call or application process, this was the case for just 12% of the individual music respondents.

54% of individual music industry respondents entered the sector by starting their own band or company, setting up as a sole trader or promoting themselves.

43% of individual music industry respondents and 34% of respondents in the performing arts sector got their first paid job through a friend or other personal contact made through socialising or networking. This is the second biggest issue after low pay for respondents in the performing arts with 27% saying that success depends entirely on who you know. 12% of those in the music industry made similar comments.

## Key issues for respondents

Music Industry (in order of importance)

1. Expectation that they will work unpaid or for very low fees compared to the cost of composing/performing/touring
2. Financial insecurity
3. The need for funds or backing to progress their careers
4. Difficulty of balancing developing a music career with the need to work to earn a living and home responsibilities (therefore lack of time, availability for music-related work and impact on mental health)
5. Few opportunities in Ireland/the sector is very competitive
6. Success depends on who you know/limited access to networks
7. Musicians are exploited by the music industry including venues, festivals, artistic leaders, employed administrators, broadcasters
8. Getting exposure eg radio, TV, live performance

Performing arts (in order of importance)

1. Expected to work unpaid or for very low wages eg unpaid overtime /flat fees for long hours
2. Success entirely depends on who you know: a closed shop
3. Difficult to balance developing arts career with need to work to earn a living and home responsibilities (therefore lack of time, availability for work related to their creative practice and impact on mental health)
4. No financial security/ stability now or in future
5. Few opportunities in Ireland because people stay put so the sector is very competitive
6. Lack of confidence
7. Getting work depends on building reputation/experience which you can't do without getting work.

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27/04/23