IXIA'S PUBLIC ART SURVEY 2015

SUMMARY AND KEY FINDINGS

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ABOUT IXIA

ixia is a public art think tank. We promote and influence the development and implementation of public art policies, strategies and projects by creating and distributing knowledge to arts and non-arts policy makers and delivery organisations within the public and private sectors, curators, artists and the public. ixia is a charitable company limited by guarantee.

For further information about ixia please visit www.ixia-info.com and www.publicartonline.org.uk.

SUMMARY

More projects, more work for artists and consultants and an increase in the value of the public art sector in England, which continues to be driven by private sector money aligned to public sector policy via the planning system. However, there is evidence of a sharp regional divide with around 57% of public art projects happening in London, the South East and the South West, which are home to 41% of the population.

At the end of 2015, ixia undertook its fourth public art survey. The findings of the survey have been compared to those from 2011, 2012 and 2013. This has enabled us to establish trends with more confidence, and to review the robustness of the data overall. As before, it has to be stressed that a dominant characteristic of the public art sector is that it is non-institutional and fragmented: encompassing a variety of disciplines; involving a diverse range of public and private sector organisations; embracing a wide range of work/employment contexts; and subject to varying degrees of economic lag, which makes quantitative analysis challenging.

Having correlated the survey's sample with known population distributions, ixia's databases and other data sources, we are able to make the following observations about the public art sector in England.[1]

- During 2015, between 1,200 and 1,300 people were working in the sector in a full-time, a part-time or a freelance capacity. This is a significant increase from around 900 people in 2013, and is similar to the amount we estimated for 2011.

- We estimate that the overall value of the sector increased from around £58m in 2013 to around £70m in 2015:

  - around 61% of funding was raised via the planning system and local authority capital budgets;

  - around 11% was linked to capital projects within the health and education sectors;

  - around 8% was linked to publicly funded arts organisations;

  - around 4% was linked to privately funded arts organisations; and

  - the remaining 16% was spread between other public bodies and trusts.

- Artists' fees were around £6.8m. This was up from around £4.5m in 2013, but is less than the estimated figures of £7.3m for 2012 and £9.6m for 2011.

- Around £4.7m was spent on consultants' fees, a rise from £3.1m in the two years since 2013, but less than the estimated figure of £5.9m for 2011.

- Around £6.7m was spent on salaried posts.

[1] Over 396 people participated in ixia's Public Art Survey 2015. Sample sizes for Scotland, Wales and Northern Ireland were too small to be used, so the key findings focus on the public art sector in England.

- Around £50m was spent on production costs. Overall, production costs as a proportion of overall spend have increased from 58% in 2011 to 71% in 2015.

The main driver for public art continued to be private sector money aligned to public sector policy, especially the planning system. The recovery in the housing and development sectors and the inclusion of cultural well-being and public art within national planning policies and guidance appear to have generated more funding and opportunities for public art at a local level.

Socially engaged practice and art and architecture remained the most typical forms of public art, with outdoor arts and events-based activities levelling out in popularity after growth in previous years.

Regional differences in the importance given to the value of public art in defining regional identity were less pronounced than in 2013, although still present. 67% of the respondents from the North East, 65% from Yorkshire and 62% from the West Midlands strongly agreed with the importance of this role compared to 53% of the respondents from London and 50% from the North West.

Overall, the age profile of the workforce continued to increase. Since 2011, those in the 25 to 44 age group have decreased from 45% to 34%, whilst those in the 45 to 64 age group have increased from 49% to 56%.

The survey continued to show a predominantly female workforce: 65% female and 35% male (the overall average from 2011 to 2015 was 63% female and 37% male), with the female age profile being distinctly younger than the male age profile.

Per head of population, there was a large disparity between the spread of new public art projects. For London, the South West and the South East the average was 28 new projects per million people and for the rest of England the average was 15 new projects per million people. The South West was the highest with 39 new projects per million people, whereas the East was the lowest with 10 new projects per million people, although these were of higher monetary value.

STRUCTURE OF THE SECTOR

The structure of the public art sector continued to be fragmented. This is due to a number of factors:

- it involves a wide range of organisations, including local authorities, publicly funded and private arts organisations and those involved with the planning, development, regeneration, health and education sectors;

- it embraces many different work/employment contexts including self-employed (which mainly comprises artists and public art consultants and is the largest group by economic value); full-time and part-time public art employees; full-time and part-time employees who have some involvement with public art; voluntary workers; and students.

However, the sector does have a structure of sorts through how it is funded. The dominant model remains private sector money aligned to public sector policy, primarily via local planning authorities, but also via other sectors, including health, education, arts, tourism and heritage.

Financial analysis of the public art sector is complex as projects commonly take place over several years. This results in varying degrees of economic lag, from the allocation of funding for a project, through to the commissioning of an artist and the completion of a public art project.

TYPES OF WORK

Public art encompasses a variety of types of work, including: large-scale and/or standalone permanent or temporary artworks; art and architecture; art integrated within the rural or the urban landscape; outdoor arts and events-based activities; and socially engaged practice.

Socially engaged practice (i.e. artists working with community groups) and art and architecture (including art integrated within urban design and landscape architecture) continued to be important to local authorities and arts organisations, and there was an increase in the number of large-scale and/or standalone permanent or temporary public art projects.

Projects located within the rural environment and landscape were significantly less typical than those located within other contexts.

The number of outdoor arts and events-based activities (i.e. festivals) appears to have levelled out in 2015, having shown some growth in 2013.

VALUES

All the segments of the sector largely agreed that public art played an important role in local, regional and national identity; improved the design of the environment; and performed an important social role. Support for the more intrinsic concepts of freedom of expression and challenging the establishment was less clearly defined, although local authorities and arts organisations were more likely to strongly agree with these values than artists and consultants who, whilst not necessarily disagreeing, were more likely to simply agree.

The most significant trend was the value placed on the social role of public art by local authorities and consultants. Since 2013, those strongly agreeing have increased from 45% to 58% for local authorities and 37% to 55% for consultants.

Overall, those aged under 45 were more likely to strongly agree on the importance and role of public art, and less likely to have no opinion.

THE MARKET

Since 2013, the public art sector has grown in terms of people and money.

During 2015, between 1,200 and 1,300 people were working in the sector in a full-time, a part-time or a freelance capacity. This is a significant increase from around 900 people in 2013, and is similar to the amount we estimated for 2011.

The growth in people working in the sector is reflected in the sector's overall value, which increased from around £58m in 2013 to around £70m in 2015.

- Around 61% of funding was raised via the planning system and local authority capital budgets.
- Around 11% of funding was linked to capital projects within the health and education sectors.
- Around 8% of funding was linked to publicly funded arts organisations.
- Around 4% of funding was linked to privately funded arts organisations.
- Around 16% of funding was spread between other public bodies and trusts.
- Artists' fees were around £6.8m. This was up from around £4.5m in 2013, but is less than the estimated figures of £7.3m for 2012 and £9.6m for 2011.
- Around £4.7m was spent on consultants' fees, a rise from £3.1m in the two years since 2013, but less than the estimated figure of £5.9m for 2011.
- Around £6.7m was spent on salaried posts.
- Around £50m was spent on production costs. Overall, production costs as a proportion of overall spend have increased from 58% in 2011 to 71% in 2015.

The main driver for public art continued to be private sector money aligned to public sector policy, especially the planning system. The recovery in the housing and development sectors and the inclusion of cultural well-being and public art within national planning policies and guidance appear to have generated more funding and opportunities for public art at a local level. Whilst the combined local authority capital and planning spend on public art remained the same at around £37m in both 2013 and 2015, there was a large shift from local authority capital spending to funding raised via the planning system.

THE WORKERS

During 2015, we estimate that between 1,200 and 1,300 people were working in the public art sector in England in a full-time, a part-time or a freelance capacity. This is a significant rise of around 36% in the two years since the last survey in 2013, and is close to the figure that we estimated for 2011. Whilst this is clearly a recovery, it is also a mixed picture:

- salaried posts have less responsibility for, or spend less time working on, public art, and there is a shift towards more part-time posts;

- consultants who list public art as their primary source of income have seen their average day rate rise from around £261 in 2011 to around £314 in 2015, whereas those who list it as a secondary source of income have seen their average day rate remain static at around £274 over the same period;

- artists who list public art as their primary source of income have seen their average day rate rise from around £259 in 2011 to around £265 in 2015, whereas those who list it as a secondary source of income have seen their average day rate fall from around £247 to around £211 over the same period.

Overall, the rise in employment is consistent with the recovery we have observed across the sector.

The sector was well educated with 88% having either an undergraduate degree and/or a post-graduate qualification. Over 62% of qualifications were in the area of Arts/Fine Art practice; 20% of qualifications were in the area of Arts/Cultural Theory; 19% of qualifications were in the area of Arts/Cultural Management; and 7% of qualifications were in the area of Architecture. Other significant areas of qualifications included planning, design and education.

Overall, the age profile of the workforce continued to increase. Since 2011, those in the 25 to 44 age group decreased from 45% to 34%, whilst those in the 45 to 64 age group increased from 49% to 56%. The age profile in London was lower than the rest of the country, with 53% below the age of 45.

The survey continued to show a predominantly female workforce: 65% female and 35% male (the overall average from 2011 to 2015 was 63% female and 37% male), with the female age profile being distinctly younger than the male age profile.
The ratio for salaried posts was 72% female and 28% male; the ratio for artists was 58% female and 42% male; and the ratio for consultants was 65% female and 35% male.

Salaried Posts

Overall, there were around 500 people working in salaried posts with varying degrees of responsibility for public art. At first glance, this appears to be an astonishing increase of 50% in 2 years, or 170 new salaried posts. However, closer examination shows that 85% of these ‘new posts’ have only a small responsibility for public art (in 40% of cases public art constitutes less than 5% of the work undertaken) and that most are part-time. In many cases and especially within local authorities, existing posts are acquiring new responsibilities because of restructuring and job cuts. In addition, planners within local authorities are becoming increasingly involved in public art because of the inclusion of cultural well-being and public art within national planning policies and guidance. Across all posts, public art was less than 50% of a post holder’s responsibilities within 70% of all posts (63% in 2013).

The public art element for all salaried employees represented an employment market of up to £6.7m.

The average full-time salary was £36,464 (up from £34,727 in 2013) and the average part-time salary remained the same as in 2013 at around £13,000. The largest distinct group of employers with posts that have some responsibility for public art was local authorities with around 140 posts.

Consultants

There were around 200 consultants working in the public art sector, a rise of around 50% since 2013.

The employment market for consultants over the past 12 months was worth around £4.7m, a rise from £3.1m in the two years since 2013. The average day-rate increased from around £273 in 2013 to around £292 in 2015.

Artists

There were around 480 artists involved with public art, an increase of nearly 40% since 2013.

The employment market for artists in 2015 was around £6.8m, a rise from £4.5m in 2013, but still less than the estimated figure of £9.6m in 2011.

Around 60% of artists earned less than £10,000.

There were two distinct groups of artists:

- for 38% of artists, public art was their primary source of income (down from 51% in 2013) and their average earnings rose from £22,095 to £24,130;

- for 62% of artists, public art was their secondary source of income (up from 49% in 2013) and their average earnings from public art fell from £8,429 in 2013 to £7,895 in 2015.

During 2015, the average day-rate for artists was around £265 where public art was their primary source of income, the same as in 2013. When public art was a secondary source of income it fell from around £219 in 2013 to around £211 in 2015.

Despite many artists preferring not to, 70% would apply for public art commissions where no fee is available for the preparation of indicative or final ideas (up from 65% in 2013).

75% of artists often or occasionally undertook other tasks associated with public art (down from 78% in 2013). The tasks included project management, curating and policy and strategy development. Project management was the most common.

OUTLOOK

Perhaps unsurprisingly levels of insecurity remained high across organisations, particularly within local authorities where a wider doubt about their future role exists.

Amongst self-employed workers, there was a decrease in optimism with 63% of consultants expecting their fees to remain the same or increase (down from 69% in 2012). On the other hand, 73% of artists expected their fees to remain the same or increase (up from 64% in 2012 and 67% in 2013). However, 8% of artists did not expect to earn any fees during 2014, compared to 5% of consultants.

LOCAL AUTHORITIES AND PLANNING POLICIES

The inclusion of cultural well-being and public art within national planning policies and guidance is a major opportunity for public art. In 2013, around 16% of local authority cultural/arts officers were unaware of this policy context, whilst this has fallen to 14% it shows that there is still advocacy work to be done in this area.

REGIONAL VARIATIONS

Around 1,100 public art projects were undertaken in England during 2015, up from 900 in 2013. Per head of population, there was a large disparity between the spread of new projects. For London, the South West and the South East the average was 28 new projects per million people. For the rest of England the average was 15 new projects per million people. The South West was the highest with 39 new projects per million people, whereas the East was the lowest with 10 new projects per million people. However, this should be qualified as the East’s spend per project was over three times higher than that in the South West.

Regional differences in the importance given to the value of public art in defining regional identity were less pronounced than in 2013, although still present. 67% of the respondents from the North East, 65% from Yorkshire and 62% from the West Midlands strongly agreed with the importance of this role compared to 53% of the respondents from London and 50% from the North West.