PUBLIC ART THINK TANK

IXIA'S PUBLIC ART SURVEY 2013

SUMMARY AND KEY FINDINGS

Published February 2014

ABOUT IXIA

ixia is England's 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 funded by Arts Council England (ACE) and is a charitable company limited by guarantee.

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

SUMMARY

Despite a fall in jobs and fees, overall funding in the public art sector increased slightly during 2013. Recovery in the housing and development sectors and the use of national planning policies and guidance that promote public art began to generate new opportunities at a local level, which will filter through to artists over the coming years.

During autumn 2013, ixia undertook its third public art survey.[1] The findings of the survey have been compared to those from 2011 and 2012. 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 the dominant characteristic of the 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 being 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 and estimates about the public art sector in England:

- During 2013, at least 880 people were working in the public art sector in a full-time, a part-time or a freelance capacity: a fall of 10% from 2012; and a fall of 32% from 2011.

- Despite a fall in the numbers of those working in a paid capacity, the public art sector's overall value increased slightly from £55m in 2012 to £58m in 2013.

- 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 began to generate more funding and opportunities for public art at a local level. Capital and planning spend on public art via local authorities increased from £29m in 2012 to £37m in 2013.

- We estimate that the public art market was worth over £167m over the three years from 2011 to 2013, which included:

  - over £90m (54%) raised via the local planning system and local authority capital budgets for public art projects, and a further £8m spent by local authorities on posts with a responsibility for public art;

  - around £12m (7%) linked to capital projects within the health and education sectors;

  - around £15m (9%) linked to publicly funded arts organisations;

  - around £6m (4%) linked to privately funded arts organisations;

[1] Over 450 people participated in ixia's Public Art Survey 2013. 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 £20m invested via the Cultural Olympiad (12%) in public art and outdoor arts;

- around £7m (4%) invested by Arts Council England, which increased its investment in public art national portfolio organisations from around £2m in 2010/11 and 2011/12 to around £3m in 2012/13;

- over £21m (13%) spent on artists' fees; over £13m (8%) spent on consultants' and project management fees; over £17m (10%) spent on salaried posts; and around £115m (69%) spent on production costs.

- Socially engaged practice and art and architecture remained the most typical forms of public art projects, with outdoor arts and events-based activities showing a steady growth in popularity.

- There were marked regional differences in the importance given to the value of public art in defining regional identity. 78% of the respondents from the Midlands strongly agreed with the importance of this role compared to 61% of the respondents from the North and the South West and 50% of the respondents from London and the South East.

- Overall, the age profile of the workforce continued to increase. Since 2012, those in the 25 to 44 age group decreased from 38% to 35%, whilst those in the 45 to 64 age group increased from 56% to 58%.

- The survey continued to show a predominantly female workforce: 64% female and 36% male (the average from 2011 to 2013 was 63% female and 37% male), with the female age profile being distinctly younger than the male age profile.

- 93% of public art workers were from White British or other white backgrounds. The 7% of public art workers who were from non-white backgrounds represented an increase of 1% since 2012. Around 14% of the population of England was non-white.

- 3% of public art workers described themselves as having a disability.

STRUCTURE OF THE PUBLIC ART SECTOR

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

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

- it involves a wide range of organisations, including local authorities, publicly funded and private arts organisations and those involved with the 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 an 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 is private sector money aligned to public sector policy, mainly via local planning authorities, but also via other public sector organisations, including those within the health and education sectors.

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

The two most typical forms of public art projects continued to be:

- art and architecture (including art integrated within urban design and landscape architecture), although there was a decrease in the number of projects of this type;

- socially engaged practice (i.e. artists working with community groups), which became more important to local authorities and arts organisations.

Projects within the rural environment and landscape were significantly less typical than other areas of public art.

Outdoor arts and events-based activities (i.e. festivals) continued to grow in importance for local authorities and arts organisations.

Large-scale permanent or temporary public art projects remained of interest, but were less common than art and architecture, outdoor arts, events-based activities and socially engaged practice.

VALUES

Artists, consultants, local authorities and organisations within the health and education sectors 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, with over 35% disagreeing that public art had a role in challenging the establishment (up by 4% from 2012 and up by 6% from 2011), and 26% disagreeing or having no opinion about public art being an important freedom of expression (up by 6% from 2011).

Whilst the overall picture for 2013 remained broadly consistent with 2011 and 2012, there are trends:

- there was a 9% increase in the value placed by local authorities on the importance of public art's contribution to local, regional and national identity;

- for consultants: 6% fewer strongly agreed that public art improved design; 10% fewer strongly agreed that public art performed an important social role; and 14% fewer strongly agreed that public art played an important part in contributing to local, regional and national identity. Whilst overall consultants agreed that these were public art's core values, there was a continued weakening in the strength of their belief and conviction, which was not shared by artists and commissioners.

THE MARKET

Despite a fall in the number of those working in the sector, its overall value increased slightly from £55m in 2012 to around £58m in 2013.

As this is now our third year of surveying the public art sector we have taken the opportunity to aggregate the figures for 2011, 2012 and 2013. This approach helped iron-out inconsistencies resulting from the economic lag between the allocation of funding for a project, through to the commissioning of an artist and the completion of a public art project:

- for the period from 2011 to 2013, we estimate that the public art market was worth over £167m;

- over £90m (54%) was raised via the local planning system and local authority capital budgets for public art projects, and a further £8m spent by local authorities on posts with a responsibility for public art;

- around £12m (7%) was linked to capital projects within the health and education sectors;

- around £15m (9%) was linked to publicly funded arts organisations;

- around £6m (4%) was linked to privately funded arts organisations;

- around £20m was invested via the Cultural Olympiad (12%) in public art and outdoor arts;

- around £7m (4%) was invested by Arts Council England, which increased its investment in public art national portfolio organisations from around £2m in 2010/11 and 2011/12 to around £3m in 2012/13;

- over £21m (13%) was spent on artists' fees; over £13m (8%) was spent on consultants' and project management fees; over £17m (10%) was spent on salaried posts; and around £115m (69%) was spent on production costs.

The overall size of the market remained broadly consistent over the last three years. There was a fall in employment, which is explained by several factors, including: fewer larger projects where production costs are proportionately greater than artists' and project management fees; and cuts to local authority public art posts.

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 began to generate more funding and opportunities for public art at a local level. Capital and planning spend on public art via local authorities increased from £29m in 2012 to £37m in 2013.

THE WORKERS

During 2013, at least 880 people were working in the public art sector in England in a full-time, a part-time or a freelance capacity: a fall of 10% from 2012; and a fall of 32% from 2011.

The fall in employment whilst the market appeared to grow slightly can be explained by economic lag linked to the recession (the allocation of funding which has not yet been spent) and an increase in the proportion of larger projects - especially around the Cultural Olympiad - where production costs were proportionately higher than artists' and project management fees.

The sector was well educated with 86% having either an undergraduate degree and/or a post-graduate qualification. Over 62% of qualifications were in the area of Arts/Fine Art practice; 22% 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. Those in the 25 to 44 age group decreased from 45% in 2011 and 38% in 2012 to 35% in 2013. whilst those in the 45 to 64 age group increased from 49% in 2011 and 56% in 2012 to 58% in 2013.

The survey continued to show a predominantly female workforce: 64% female and 36% male (the average from 2011 to 2013 was 63% female and 37% male), with the female age profile being distinctly younger than the male age profile. The ratio for salaried posts and consultants was 70% female and 30% male, and the ratio for artists was 60% female and 40% male.

In England, 93% of public art workers were from White British or other white backgrounds. The 7% of public art workers who were from non-white backgrounds represented an increase of 1% since 2012. Around 14% of the population of England was non-white.

3% of public art workers described themselves as having a disability.

Salaried Posts

Like for like, there were approximately 330 people working in salaried posts with varying degrees of responsibility for public art, a fall of around 16% since 2012. However, an additional factor in local authorities was the increased involvement of planners in public art. This was partly due to cuts in public art posts, but also because of the explicit support for cultural well-being and public art within national planning policies and guidance. The survey did not fully capture the involvement of planners in public art, but we were able to estimate their number through data collected from ixia’s events. We estimate that there are a further 120 posts in planning which have public art within their portfolio of responsibilities.

The public art element for all salaried employees represented an employment market of around £5m, a small decrease from £5.2m in 2012. This suggested that these fewer salaried posts were either more senior or that public art was a larger part of their responsibilities. At least 68% of these posts were wholly or partially dependent on public sector funding (a decrease from 72% in 2012).

As with last year, public art was less than 50% of the post holder’s responsibilities within 63% of posts (full-time and part-time).

The average full-time salary was £34,727 (up from £32,526 in 2012) and the average part-time salary was £13,000 (down from £14,048 in 2012). The largest distinct group of employers with posts that have some responsibility for public art was local authorities with around 156 posts, followed by publicly funded arts organisations with around 52 posts.

Consultants

There were approximately 130 consultants working in the public art sector, a fall of around 30% since 2012.

The employment market for consultants in England over the past 12 months was worth around £3.1m, a fall from £4.5m in 2012. The average day-rate rose from £266 in 2012 to £273 in 2013.

Consultants were largely involved with the project management of public art projects, with over 85% regularly undertaking work for local authorities (the same as in 2012) and a similar percentage working with publicly funded arts organisations (up by 6% from 2012). On average, consultants’ earnings remained static at around £23,500 in 2013. Around 38% of consultants earned less than £15,000 and over 16% of consultants earned more than £30,000.

Artists

There were approximately 300 artists involved with public art across England, a fall of around 25% since 2012.

The employment market for artists in 2013 in England was around £4.5m, a fall from £9.6m in 2011 and a fall from £7.3m in 2012.

Around 40% of artists earned less than £10,000, roughly the same as in 2012.

There were two distinct groups of artists:

- for 51% of artists public art was their primary source of income (up from 49% in 2012) and their average earnings fell from £25,200 to £22,100. Around 2% of this group earned over £50,000;

- for 49% of artists public art was their secondary source of income (down from 51% in 2012) and their average earnings from public art fell from £9,556 in 2012 to £8,429 in 2013.

During 2013, the average day-rate for artists was around £265 where public art projects were their primary source of income (up from £262 in 2012) and around £219 where public art projects were their secondary source of income (up from £215 in 2012).

Despite many artists preferring not to, 65% would apply for public art commissions where no fee is available for the preparation of indicative or final ideas (down from 70% in 2012).

78% of artists often or occasionally undertook other tasks associated with public art projects. This was mostly project management, but also included curating and policy and strategy development.

OUTLOOK

Levels of uncertainty remained high across organisations, particularly within local authorities. The percentage of local authority officers who felt secure in their posts fell from 47% in 2012 to 35% in 2013, whilst those who felt at some risk of being made redundant rose from 31% to 48%.

Amongst self-employed workers, there was an increase in optimism with 69% of consultants expecting their fees to remain the same or increase (up from 64% in 2012); and 67% of artists expecting their fees to remain the same or increase (up from 64% in 2012). However, 12% of artists did not expect to earn any fees during 2014, compared to 2% 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, although around 16% of local authority cultural/arts officers were still unaware of this policy context. However, an increased number of planners who did not take part in this survey were involved in this area of work.

REGIONAL VARIATIONS

Around 900 public art projects were undertaken in England during 2013. Per head of population, projects were relatively evenly spread across London, the Midlands and the North, recording around 20 new projects per million people in 2013. The highest proportion of new projects was found in the South West, with around 30 per million people, whilst the lowest was in the South East, with around 10 per million people. In terms of financial value, it was more difficult to quantify the distribution, although relatively speaking the highest spend per head was in London, followed by the South West, and then the South East, the North and the Midlands.

There were marked regional differences in the importance given to the value of public art in defining regional identity. 78% of the respondents from the Midlands strongly agreed with the importance of this role compared to 61% of the respondents from the North and the South West and 50% of the respondents from London and the South East.