IXIA'S PUBLIC ART SURVEY 2018

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

KEY POINTS

- ***The 2018 survey findings characterise 'public art' in the UK as primarily an instrumental process driven by artists, consultants and organisations who believe the arts play an important social role; improve design of the environment; and strengthen regional identity – the survey reflects a 'placemaking' agenda;***
- ***Since our last survey in 2015 the sector appears to have reduced in size by around 10-15%;***
- ***Public art continues to be driven by a mixture of private and public money, frequently aligned to public sector policy via the planning system;***
- ***Responsibility for public art within local authorities is becoming less focused, with a reduction in public art posts and dilution of expertise;***
- ***There has been an increase in consultancy fees, and growth in regional and national organisations developing public art programmes;***
- ***Workers in the sector are growing older. Since 2011 the average age for men has risen from 48 to 55, and for women from 44 to 49 – the 'sector' appears to be PAF/ixia cohort;***
- ***There was an 18% decrease in artists and a 12.5% increase in consultants;***
- ***Although women are the majority workers in the sector, there appears to be a significant gender imbalance in terms of earnings.***

In April 2018, ixia undertook its fifth public art survey - 384 people participated in it. The findings of the survey have been compared to those from 2011, 2012, 2013 and 2015. This has further enabled us to explore trends with more confidence, and to review the robustness of the data overall. This year we have include Scotland, Wales and Northern Ireland in the report, although data relating to these regions is excluded from some analysis – which data source we are using is signalled by the use of either England, UK or a specific region.

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 – from a few months to several years. All this makes quantitative analysis extremely challenging. Therefore, whilst we believe the quantitative data is valuable (especially around freelance employment) we have a greater confidence in qualitative and demographic trends than absolute financial values and worker numbers – especially those working in salaried posts where responsibility and definitions have become blurred.

1 STRUCTURE OF SECTOR

Understanding the dynamics and structure of the public art sector in the UK is challenging because:

- it involves a wide range of individuals and 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, of which the largest group – over two thirds - are self-employed;

- there are no trade associations;

- quantitative financial analysis of the public art sector is complex as projects commonly take place over several years resulting results in varying degrees of economic lag, from the allocation of funding for a project, through to the commissioning of an artist and eventual completion; the expenditure is not recorded in a consistent accessible way..

As a consequence of these characteristics there are no agreed ways of recording and storing data, 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, and to a lesser extent via the health, education, arts, tourism and heritage sectors.

Ixia's surveys distinguish four distinct groups of workers:

- Artists
- Consultants
- Local Authorities
- Other organistions

2 VALUES

All groups in the UK public art sector largely believe that public art plays an important role in local, regional and national identity; improves the design of the environment; and performs an important social role. These instrumental functions consistently receive more support than the more intrinsic concepts of freedom of artistic expression or challenging orthodoxy.

3 THE MARKET

- We estimate that the overall value of the sector in the UK fell slightly from around £70m in 2015 to around £68m in 2017-18.

- We estimate that around 57% of funding was raised via the planning system and local authority core and capital budgets. Of the remaining 43%:

    - around 6% was linked to capital projects within the health and education sectors, down from 11% in 2015;
    - around 14% was linked to publicly funded arts organisations, up from 8% in 2015
    - around 9% was linked to privately funded arts organisations, up from 4% in 2015;
    - the remaining 14% was spread between other public bodies and trusts.

Based on the returns submitted by artists, all in all, we estimate round 1,100 public art projects were undertaken in the UK in 2017-18, at an average cost of £61.8k (this includes artists' and consultants' fees, construction/material costs, and organisational overheads).

4 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 the most common types of public art practiced by artists, and although there continued to be a high number of large-scale and/or standalone permanent or temporary public art projects, they fell significantly from previous surveys. Projects located within rural environments also fell.

5 THE WORKERS

5.1 Numbers

During 2017-18, we estimate that around 1,100 people were working in the public art sector in England in a full-time, a part-time or a freelance capacity. This is a fall of around 16% in the two years since the last survey in 2015.

5.2 Age and Gender

The survey continued to show a predominantly female workforce: 65% female and 35% male. This ratio has been constant to within +/- 1% for all surveys since 2011[*].

[*] ONS data for 2017 states 48,000 people in the UK were working as Artists: 45% male, 55% female, 80% self-employed. Artists are differentiated from Authors (92,000), Actors (45,000), Dancers (21,000), Musicians (44,000), Arts Officers/Producers (97,000) and Photographers (69,000).

Over this period, the female age profile remains younger than the male age profile, although the average age for men has increased from 48 to 55, whilst the average age for women has increased from 44 to 49.

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.

Whilst in absolute terms there were more female artists than male, female artists only accounted for 36% of the female cohort whereas male artists accounted for 51% of the male cohort.

Average earnings for female artists was £9,838, whilst for males it was £25,122.

Average earnings for female consultants was £25,921, whilst for males it was £27,166. The average salary in the UK in 2017 was £27,600.

5.3 Education

As in previous years, the survey shows the sector was highly educated with over 89% having either an undergraduate degree and/or a post-graduate qualification. Over 61% of qualifications were in the area of Arts/Fine Art practice; 25% of qualifications were in the area of Arts/Cultural Theory (a rise of 5% since 2015); 21% of qualifications were in the area of Arts/Cultural Management (the same as 2015); and 8% of qualifications were in the area of Architecture (a rise of 1% since 2015). Other significant areas of study included planning, design and education.

5.4 Earnings

5.4.1 Artists

We estimate there were about 460 artists involved in public art in the UK in 2017-18 (an 18% decrease from 560 in 2015).

We estimate total artists' fees were around 6m. This was down from around £6.8m in 2015 suggesting a continuing downward trend from a high point of £9.6m for 2011. 22% of artists expect their earnings to increase, 61% expect them to remain the same or decrease and 17% expect to earn nothing.

Artists who list public art as their primary source of income have seen their average day rate rise from around £250 in 2011 to around £266 in 2018, whereas those who list it as a secondary source of income have seen their average day rate fall from around £247 to around £227 over the same period.

For artists who indicated public art as their primary source of income their average annual earnings were £23,696 – this is down from £24,130 in 2015, and £28,413 in 2011.

For artists who indicated public art as their secondary source of income their average annual earnings were £9,649 – this is up from £7,895 in 2015, and £8,413 in 2011.

5.4.2 Consultants

We estimate there were about 270 consultants involved in public art in the UK in 2017-18 (an 12.5% increase from 240 in 2015).

We estimate total consultants' fees were around £5.1m, a rise from £4.7m in the three years since 2015, but still less than the estimated figure of £5.9m for 2011. 26% of consultants expect their earnings to increase, 70% expect them to remain the same or decrease and 4% expect to earn nothing.

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 £334 in 2018, whereas those who list it as a secondary source of income have seen their average day rate fall around from £274 to £263 over the same period. The rise in consultants' earnings is possibly a consequence of cuts to salaried public arts posts in local authorities.

For consultants who indicated public art as their primary source of income their average annual earnings were £34,107 – this is up from £31,019 in 2015, and £25,000 in 2011.

For consultants who indicated public art as their secondary source of income their average annual earnings were £14,271 – this is up from £13,800 in 2015, and down from £20,357 in 2011.

Artists vs. Consultants

There are clear overlaps between the roles of artists and consultants in the public art sector, which undoubtedly blurs the use of these descriptors. However, we believe they are a useful distinction between creative/production roles and administrative/policy roles.

- 21% consultants also undertook work as artists (a fall from 36% in 2011), and 75% of artists also undertook public art consulting work (a rise from 71%). A possibility here is that the smaller the project the more the project management (including administrative/policy work) falls to the artist – particularly given an overall decline in public art posts within local authorities.

- 32% of consultants operated as Limited Companies (21% in 2011) vs. 19% of artists (13% in 2011).

- Professional indemnity taken out by artists has risen from 37% in 2011 to 57% in 2018. For consultants it has risen from 36% to 74%. 42% of female artist had Professional indemnity cover, 76% of male artists had Professional Indemnity cover.

- 54% of artists and 61% of consultants think their earning will increase over the next year. However, 17% of artists think they will earn nothing from public art whilst only 4% of consultants have the same outlook.

5.4.3 Salaried Posts

There were approximately 375 people working in salaried posts with varying degrees of responsibility for public art in the UK, a decrease from over 500 in 2015. It should be noted that in 2015 we were surprised at what appeared at an increase of 50% in public art posts in the preceding 2 years. However, closer examination showed that 85% of those 'new posts' had only a small responsibility for public art (in 40% of cases public art constituted less than 5% of their work responsibility, less than 2 hours per week if they were full-time, and most were part-time.

6 LOCAL AUTHORITIES

Over 93 separate local authorities (out of a potential 353) have participated in the ixia Public Art Survey over the last five years. Of that 93, only 47% have completed it more than once, and only 20% more than three times. Only two have completed all five surveys.

The number of staff with a 'lead' responsibility for public art within local authorities has become increasing difficult to assess. Only 23% of those who responded indicated that public art was their main responsibility, for 30% it took up less than 5% of their time. Anecdotally, many authorities appear to spread 'responsibility' thinly, and many previously effective authorities have deleted all public art posts.

Although we are confident that around 57% of funding was raised via the planning system and local authority core and capital budgets, this was inferred from data supplied by non-LA workers in addition to the data supplied by local authorities.

Whilst average planning gain appears to have risen, we are not confident that this can necessarily be extrapolated.

7 REGIONAL VARIATIONS

36% of projects took place in either London and the South (East + West).

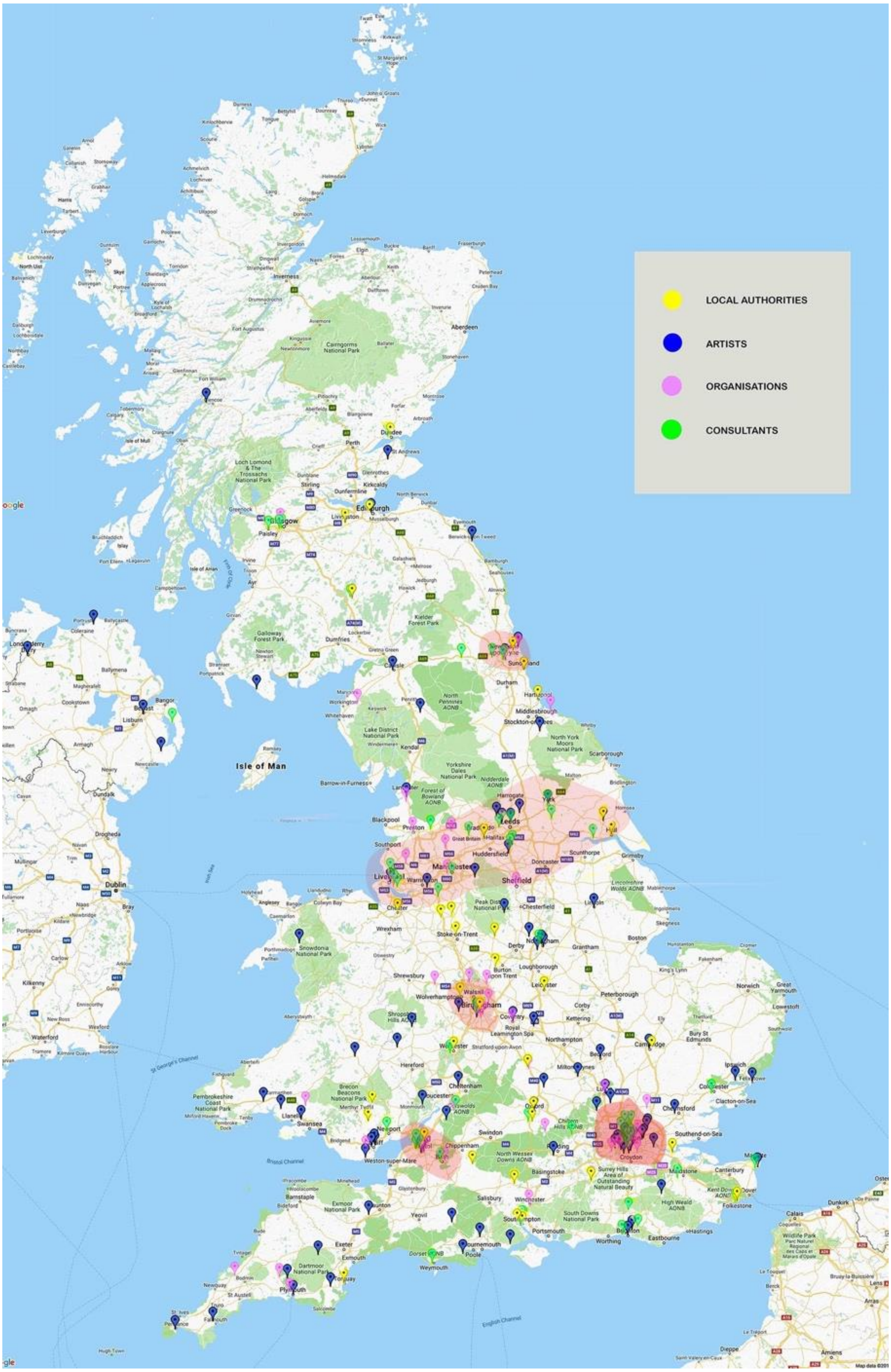
48% of workers were in London and the South (East + West). Aggregating all surveys since 2011, the average deviation from the UK Census population was +62% for the South West, and +29% for London.

- There is a large cluster of artists, consultants and organisations in London (no local authorities in London completed the survey in 2018[†]);
- There are significant cluster of consultants, organisations and local authorities, around Bristol/Bath, Birmingham and Newcastle/Tyneside; and
- A distinct band of artists, consultants, local authorities and organisations broadly across the M62 corridor (Liverpool – Manchester – Leeds/Wakefield – York – Hull).
- In general, artists are the most evenly dispersed workers.

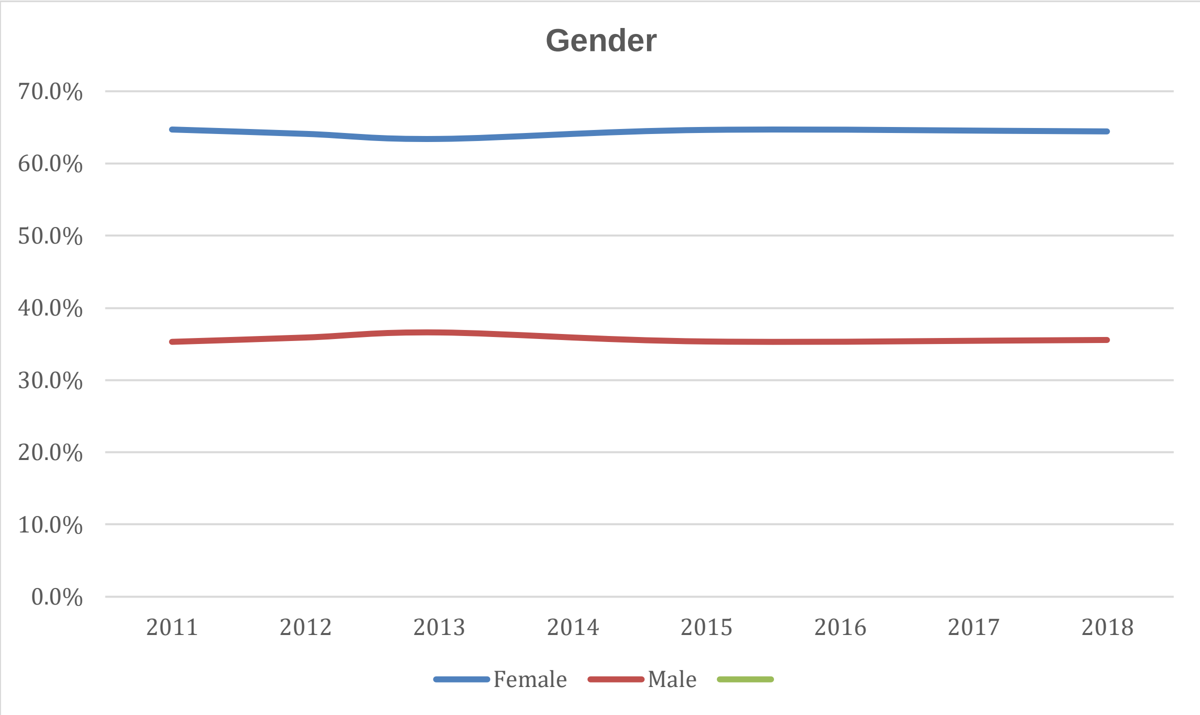
[†] Regarding London, in the past Wandsworth and Southwark have completed the survey three times each. Others, completing it only once, were Westminister, Lewisham, Ealing and Bexley

8 APPENDIX

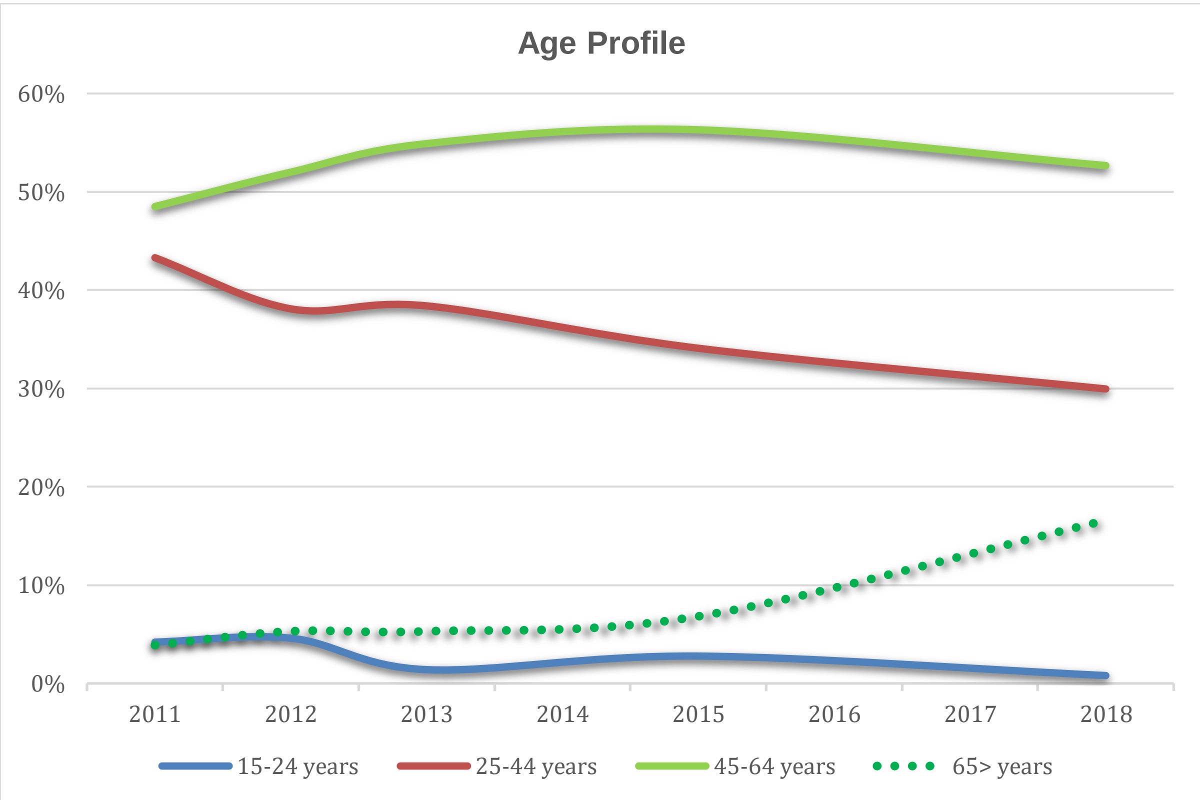
8.1 UK Public Art Map



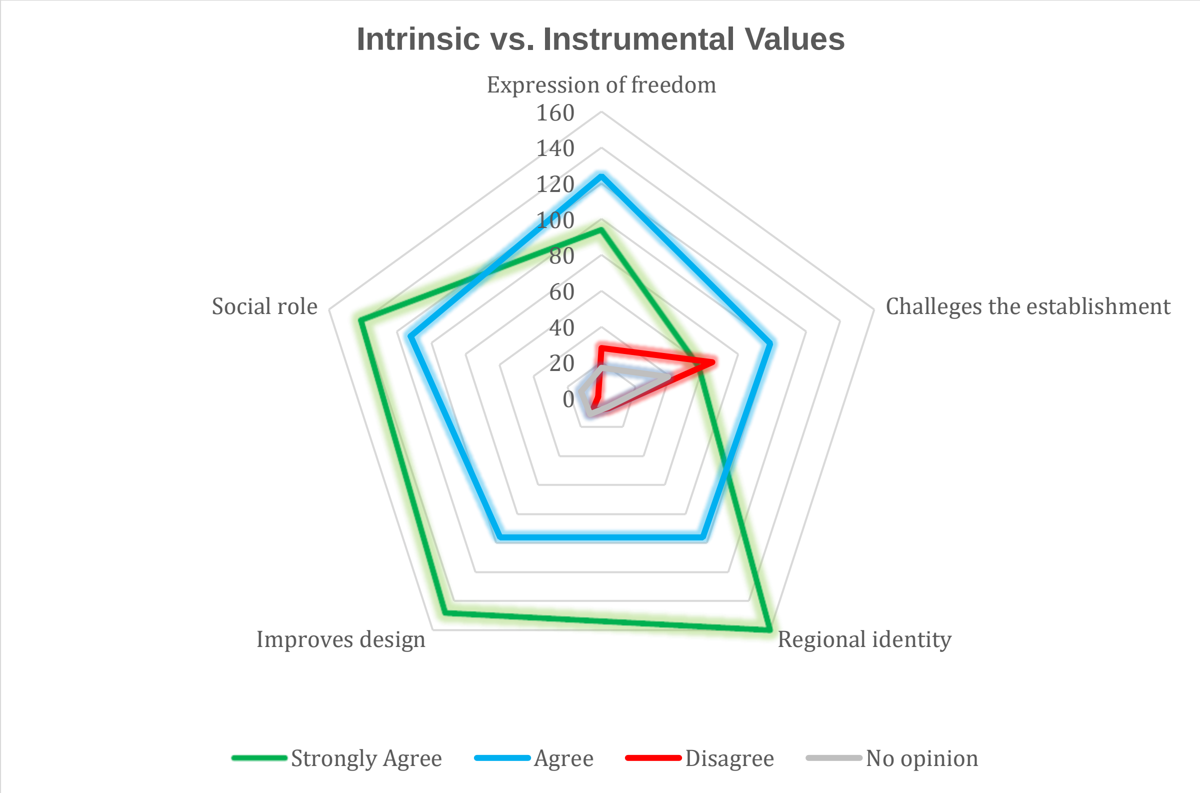
8.2 Gender



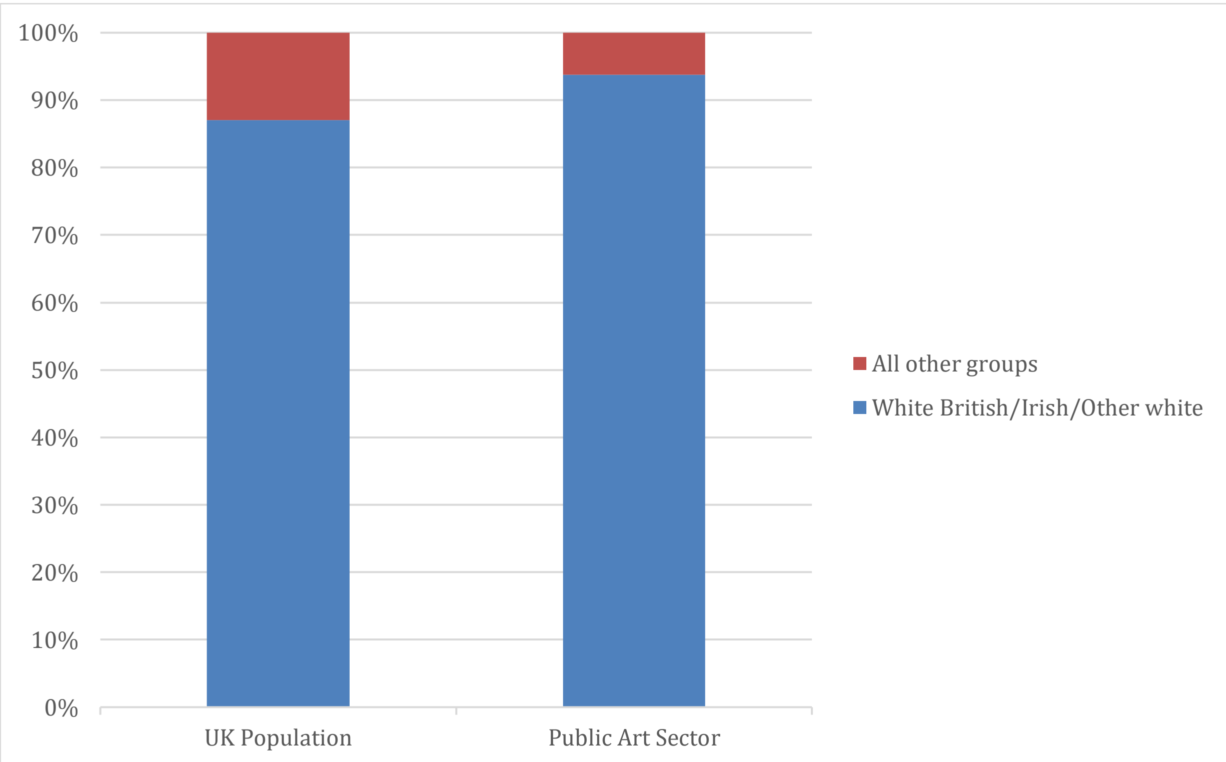
8.3 Age



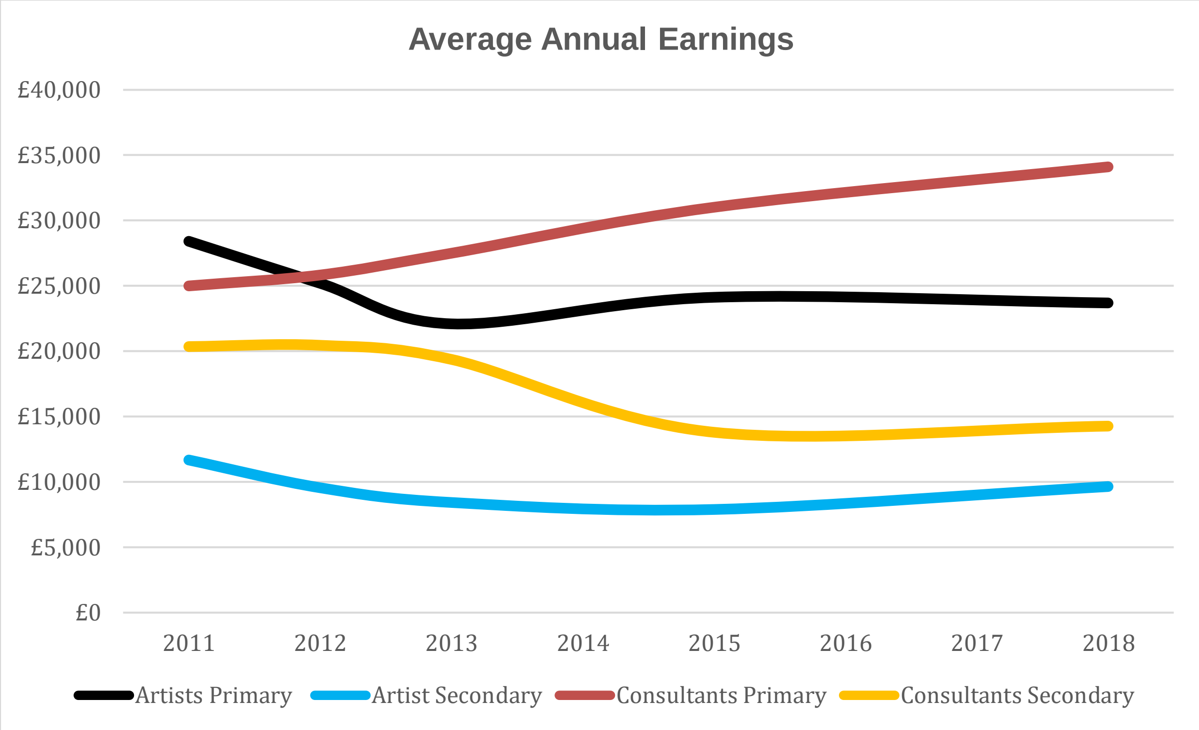
8.4 Values

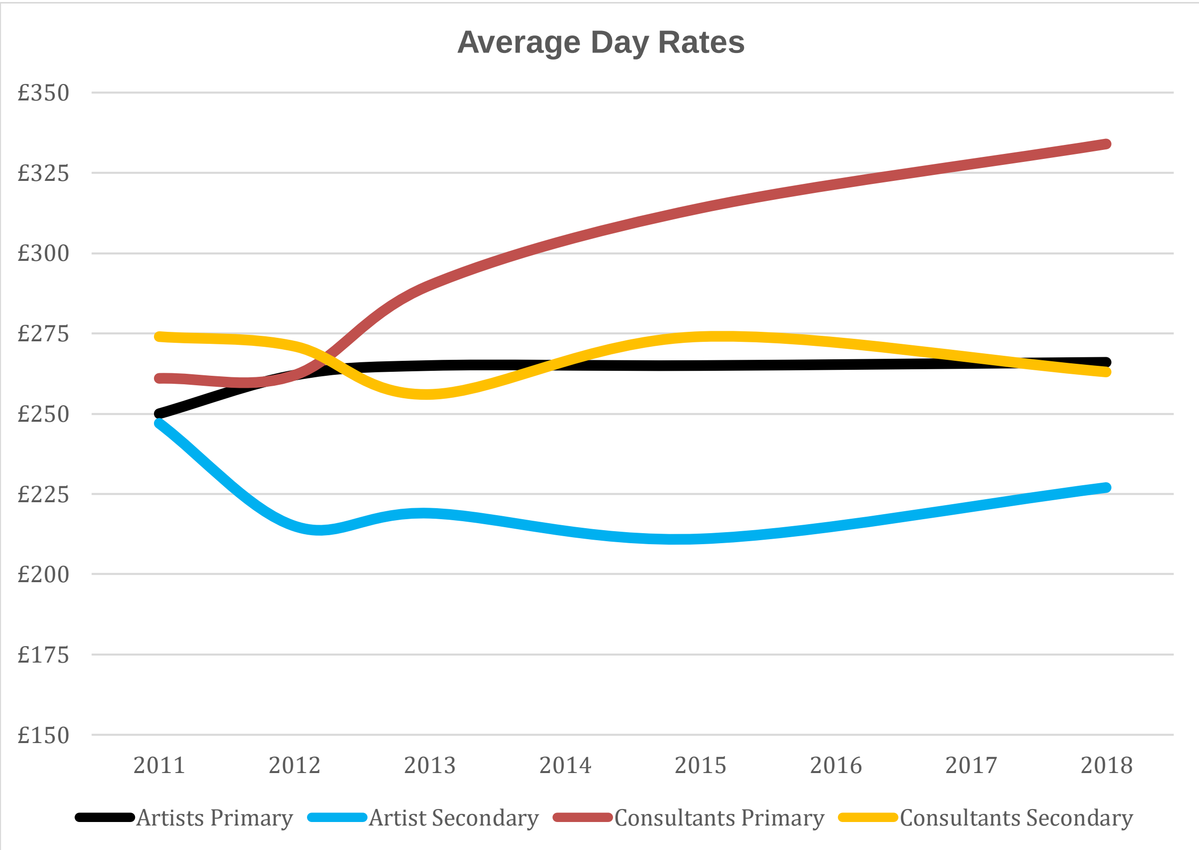


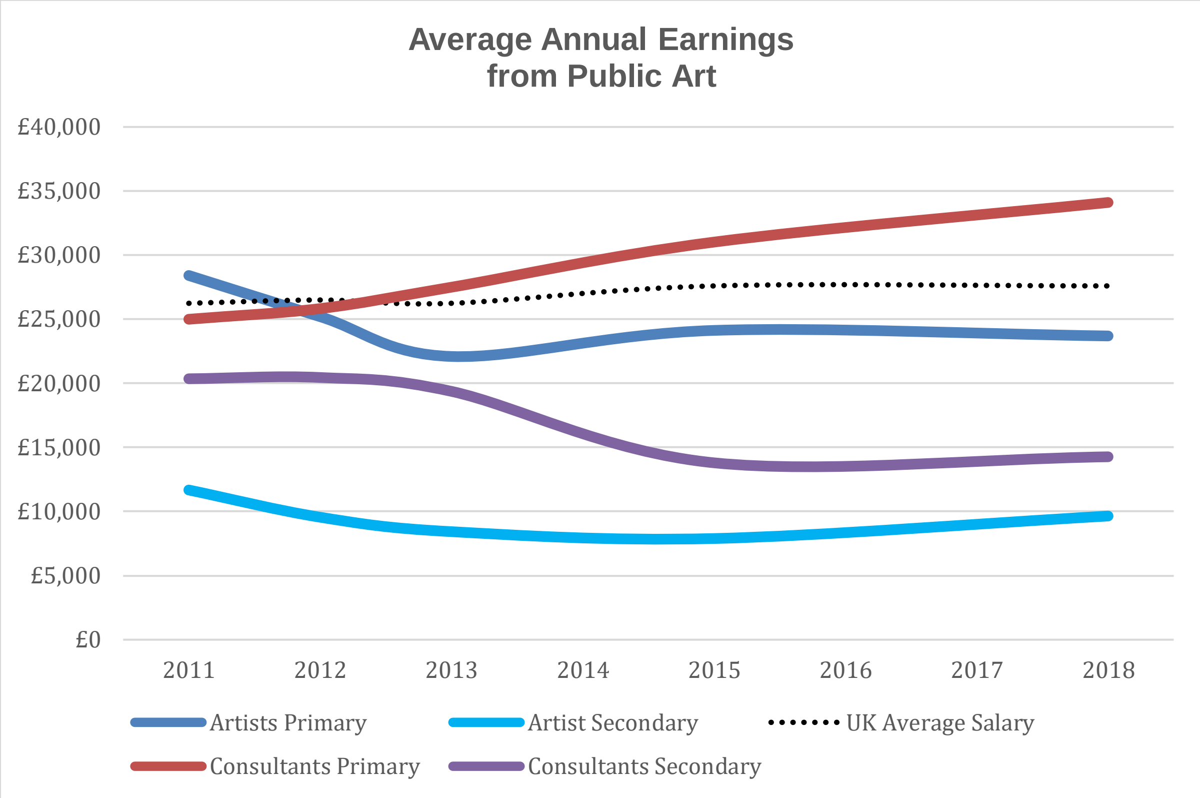
8.5 Ethnicity

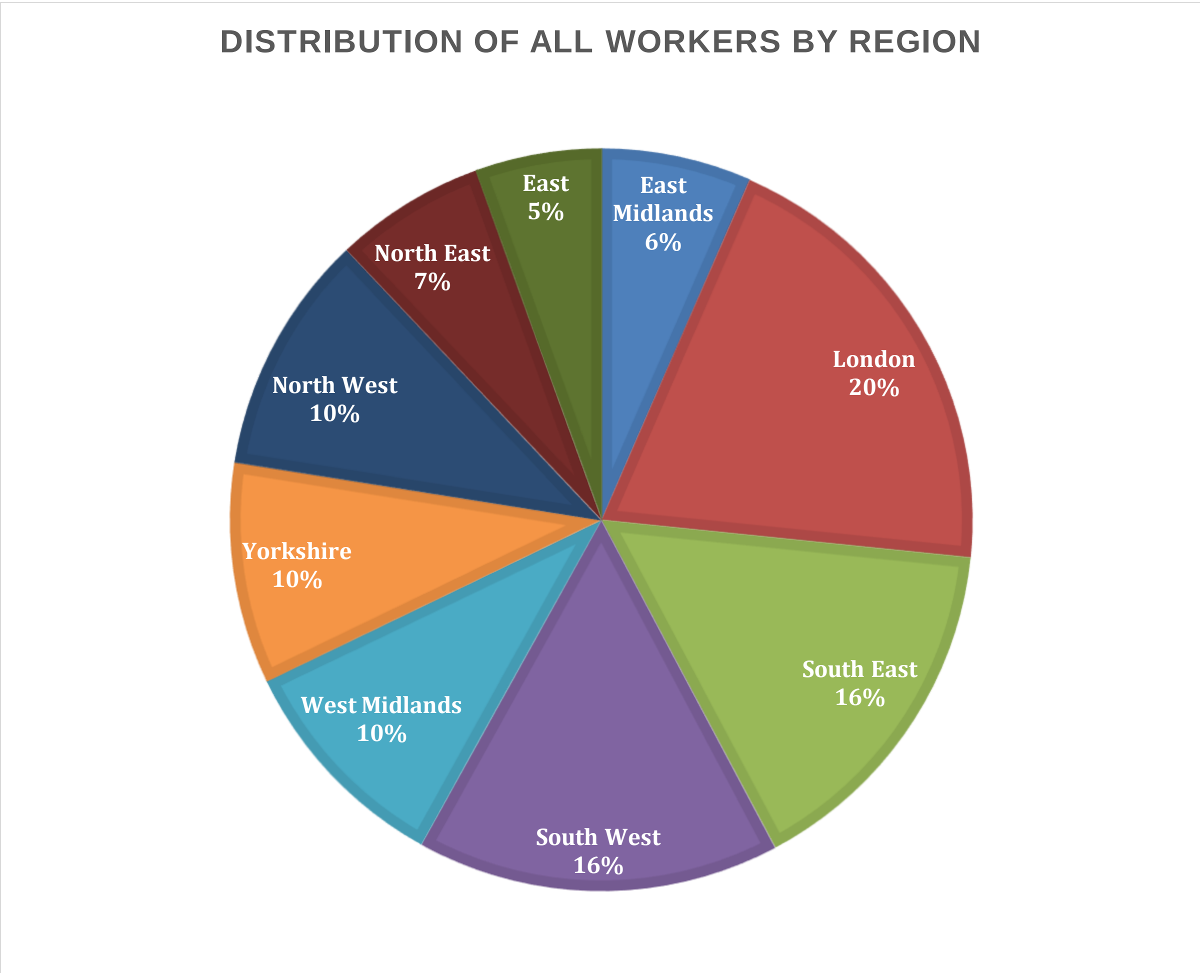


8.6 Earnings – Artists & Consultants






Average Annual Earnings
from Public Art
£40,000
£35,000
£30,000
£25,000
£20,000
£15,000
£10,000
£5,000
£0
2011
2012
2013
2014
2015
2016
2017
2018
Artists Primary
Artist Secondary
UK Average Salary
Consultants Primary
Consultants Secondary


DISTRIBUTION OF ALL WORKERS BY REGION
East
5%
East
Midlands
6%
North East
7%
North West
10%
London
20%
Yorkshire
10%
West Midlands
10%
South West
16%
South East
16%

8.7 Local Authorities Participating in Survey (2011-18)

<table>
<tr><th></th><th>2011</th><th>2012</th><th>2013</th><th>2015</th><th>2018</th></tr>
<tr><td>Nos. of LAs --></td><td>40</td><td>38</td><td>33</td><td>25</td><td>24</td></tr>
<tr><td>1</td><td></td><td></td><td></td><td>Aberdeenshire Council</td><td></td></tr>
<tr><td>2</td><td colspan="2">Adur District Council & Worthing Borough Council</td><td></td><td></td><td></td></tr>
<tr><td>3</td><td></td><td colspan="2">Bath & North East Somerset Council</td><td></td><td></td></tr>
<tr><td>4</td><td></td><td></td><td></td><td colspan="2">Birmingham City Council</td></tr>
<tr><td>5</td><td></td><td></td><td>Blaenau Gwent</td><td></td><td>Blaenau Gwent</td></tr>
<tr><td>6</td><td></td><td></td><td>Blackpool Council</td><td></td><td></td></tr>
<tr><td>7</td><td>Borough of Poole</td><td></td><td></td><td>Borough of Poole</td><td></td></tr>
<tr><td>8</td><td colspan="3">Bristol City Council</td><td></td><td></td></tr>
<tr><td>9</td><td></td><td></td><td colspan="2">Caerphilly County Borough Council</td><td></td></tr>
<tr><td>10</td><td></td><td></td><td></td><td colspan="2">Calderdale</td></tr>
<tr><td>11</td><td>Canterbury City Council</td><td></td><td>Canterbury City Council</td><td></td><td></td></tr>
<tr><td>12</td><td></td><td></td><td></td><td>Camden Council</td><td></td></tr>
<tr><td>13</td><td></td><td></td><td></td><td></td><td>Cambridge City Council</td></tr>
<tr><td>14</td><td colspan="2">Chelmsford Borough Council</td><td></td><td></td><td></td></tr>
<tr><td>15</td><td></td><td colspan="2">Cheltenham Borough Council</td><td></td><td></td></tr>
<tr><td>16</td><td></td><td></td><td></td><td></td><td>Cherwell</td></tr>
<tr><td>17</td><td></td><td></td><td></td><td></td><td>Cheshire East Council</td></tr>
<tr><td>18</td><td colspan="5">Cheshire West and Chester</td></tr>
<tr><td>19</td><td>Chesterfield Borough Council</td><td></td><td></td><td></td><td></td></tr>
<tr><td>20</td><td></td><td colspan="3">Chichester District Council</td><td></td></tr>
<tr><td>21</td><td></td><td>City & County of Swansea</td><td></td><td></td><td></td></tr>
<tr><td>22</td><td>City of Westminster</td><td></td><td></td><td></td><td></td></tr>
<tr><td>23</td><td>Corby Borough Council</td><td></td><td></td><td></td><td></td></tr>
<tr><td>24</td><td></td><td colspan="2">Derby City Council</td><td></td><td></td></tr>
<tr><td>25</td><td></td><td></td><td>Derbyshire County Council</td><td></td><td>Derbyshire County Council</td></tr>
<tr><td>26</td><td></td><td></td><td>Doncaster Council</td><td></td><td></td></tr>
<tr><td>27</td><td>Dorset County Council</td><td></td><td></td><td></td><td></td></tr>
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<table>
<tr><th></th><th>2011</th><th>2012</th><th>2013</th><th>2015</th><th>2018</th></tr>
<tr><td>28</td><td></td><td></td><td>Dudley MBC</td><td></td><td></td></tr>
<tr><td>29</td><td></td><td></td><td></td><td colspan="2">Dundee City Council</td></tr>
<tr><td>30</td><td colspan="4">East Devon District Council</td><td></td></tr>
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<tr><td>34</td><td>Greater London Authority</td><td></td><td></td><td></td><td></td></tr>
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<tr><td>48</td><td></td><td></td><td></td><td></td><td>Leicester Arts & Mus. Serv.</td></tr>
<tr><td>49</td><td></td><td>Lewisham</td><td></td><td></td><td></td></tr>
<tr><td>50</td><td></td><td></td><td colspan="2">Liverpool City Council</td><td></td></tr>
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<tr><td>52</td><td>London Borough of Bexley</td><td></td><td></td><td></td><td></td></tr>
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<tr><td>55</td><td></td><td></td><td></td><td>Mayo Co Council</td><td></td></tr>
<tr><td>56</td><td>North Tyneside Council</td><td></td><td></td><td></td><td>North Tyneside Council</td></tr>
</table>

	2011	2012	2013	2015	2018
57		Mid Suffolk District Council			
58			Mid Sussex District Council		
59					
60		Milton Keynes			
61		Norwich City Council			
62			Orkney		
63		Oxford City Council			
64				Pembrokeshire County Council	
65		Preston City Council			
66		Redcar & Cleveland B~C			
67		Rotherham MBC			
68					Sheffield City Council
69			Somerset County Council		
70	South Cambs District Council				
71	South Gloucestershire Council				
72	South Somerset DC		South Somerset DC		
73	Southwark Council		Southwark Council		
74		South Staffordshire Council			
75					South Oxfordshire DC
76					Southampton City Council
77	Stoke-on-Trent				Stoke-on-Trent City council
78			St Helens		
79				Stretton Parish Council (Burton upon Trent)	
80		Surrey CC			
81			Test Valley Borough Council		
82					Torbay Council
83			Tunbridge Wells BC		
84		Vale of Glamorgan Council			

	2011	2012	2013	2015	2018
85			Vale of white Horse District Council & South Oxfordshire District Council		
86	Walsall				
87	Wandsworth				
88	Warrington Borough Council				
89		West Lothian Council		West Lothian Council	
90		West Oxfordshire District Council			
91		Wiltshire		Wiltshire	
92	Wolverhampton City Council				
93		Worcester City			Worcester city
94	Wyre Forest District Council				

8.8 Local Authority Average Planning Gain