Written evidence submitted by Dr David O'Brien

The impact of COVID-19 on the DCMS sectors: A submission to the Digitial, Culture, Media and Sport Select Committee inquiry

Dr Dave O'Brien, Chancellor's Fellow, Cultural and Creative Industries, University of Edinburgh

Overview

1 This submission will focus on issues of equality and diversity in the cultural and creative industries. It will present the longer-term trends in these sectors, to address the likely long-term impacts of COVID-19. It will highlight longstanding inequalities in the workforce. The longstanding, and structural, nature of workforce inequalities suggest the specific impacts of COVID-19 on cultural and creative industries will not be evenly distributed. We are likely to see working class origin and BAME individuals further excluded from the workforce, and women will be less likely to make it into senior positions across arts and cultural industries.

What do we know about the arts and culture workforce?

2. The department for Culture, Media and Sport defines Cultural and Creative Industries as 9 clusters of occupations within the economy: Advertising and Marketing; Architecture; Crafts; Design (product, graphic and fashion design); Film, TV, radio and photography; IT, software and computer services; Publishing; Museums, galleries and libraries; and Music, performing and visual arts. These sectors correspond with 30 groups of occupations, for example Music, performing and visual arts is constituted by: Artists; Actors, entertainers and presenters; Dancers and choreographers; and Musicians. Within this part of the economy we can see that inequality, by gender, ethnicity, and social and economic status, is an important characteristic of cultural and creative work (O'Brien *et al* 2016, Oakley *et al* 2017, Brook *et al* 2020, Carey *et al* forthcoming 2020).

3. Whilst DCMS publishes data on gender and ethnicity in the creative workforce, it does not publish information on social class origins. In 2014 the Office for National Statistics' (ONS) Labour Force Survey (LFS) began collecting data on the class origins of the workforce. O'Brien *et al* (2016) used this data to analyse the demographics of workers in cultural and creative occupation. Table 1 shows creative occupations by gender, ethnicity, and levels of education. Tables 2 and 3 show creative occupations by social class (formatting reproduced from O'Brien *et al* 2016). They show the creative workforce has high levels of university educated workers (excluding Crafts occupations); That all occupations aside from IT have lower levels of ethnic minorities as compared to the workforce generally; That women are, compared to the workforce overall, overrepresented in occupations associated with Museums, Galleries, and Libraries and Publishing, but underrepresented in Film and TV, Crafts, Architecture, and IT; And that there are huge class origin imbalances across the creative workforce and in almost every occupational group excluding Crafts. Every occupation in the creative industries has a lower level of those from working class origins (NS-SEC 6-8) than the workforce in

general. The situation is especially grave in occupations associated with Publishing, Advertising and Marketing, Music and Performing Arts, Museums and Galleries, and Design. All of these occupational groups have over a quarter of the workforce drawn from professional and managerial, 'upper middle class' social origins (NS-SEC 1).

Table 1. Composition of the culture and creative industries.

	% male	% white	% w/Uni degree or higher	Weighted per cent of CCIs	*n*	*n* with income
IT, software, and computer services	85.2	85.5	68.4	29.80	478	348
Advertising and marketing	51.7	92.6	65.5	23.20	372	244
Music, performing and visual arts	55.1	92.9	60.4	8.90	147	14
Design: product, graphic, and fashion design	53.7	96.1	55.3	8.10	136	69
Publishing	45.6	93.1	71.0	7.80	133	55
Film, TV, video, radio, and photography	75.9	93.2	59.6	7.30	117	37
Crafts	76.6	95.0	20.6	6.10	106	41
Architecture	70.1	91.7	87.2	6.40	105	74
Museums, galleries, and libraries	37.3	97.5	76.3	2.40	43	36
Total in CCIs	65.8	91.1	64.0	100.00	1637	918
Total in NS-SEC 1	65.7	89.9	66.3			
Total in NS-SEC 2	44.8	91.7	48.5			
Total in population	49.1	89.8	29.7			

Notes: Weighted percentages based on recommended survey weighting. All respondents reporting an occupation assigned to a CCI sector, aged 23–69 and not in full-time education.

Table 2. Origins in creative industries compared with population and NS-SEC 1 and 2.

	NS-SEC 1 Origins	NS-SEC 2 Origins	NS-SEC 3–5 Origins	NS-SEC 6–8 Origins
Creative industries as a whole	26.1%	23.9%	32.0%	18.0%
NS-SEC 1	26.4%	20.6%	33.5%	19.5%
NS-SEC 2	18.3%	20.2%	35.9%	25.7%
Population as a whole	14.1%	15.0%	36.2%	34.7%

Notes: Weighted percentages based on recommended survey weighting. All respondents reporting an occupation, aged 23–69 and not in full-time education. *N* = 1637 for CCIs, 5491 for NS-SEC 1, 9614 for NS-SEC 2, and 45,356 for population as a whole.

Table 3. Origins for each sector and occupation.

	Higher Prof & Mgrs	Lower Prof & Mgrs	Intermediate Occs	Routine and semi-routine	*n*
Publishing	**43.2%**	**17.7%**	**27.1%**	**11.9%**	**133**
Authors, writers, and translators	47%	15%	28%	10%	72
Journalists, newspaper, and periodical editors	38%	20%	26%	15%	61
Advertising and marketing	**30.8%**	**24.0%**	**26.3%**	**19.0%**	**372**
Public relations professionals	38%	26%	24%	12%	51
Marketing and sales directors	33%	23%	27%	17%	137
Advertising accounts mngrs and creative directors	29%	22%	28%	20%	24
Advertising and public relations directors	28%	22%	29%	21%	24
Marketing associate professionals	27%	24%	25%	23%	136
Music, performing and visual art	**28.3%**	**25.0%**	**32.9%**	**13.8%**	**147**
Musicians	38%	21%	30%	10%	54
Dancers and choreographers	*24%*	*24%*	*41%*	*11%*	*9*
Actors, entertainers, and presenters	22%	29%	29%	21%	36
Artists	21%	27%	38%	14%	48
Design: product, graphic, and fashion design	**26.1%**	**19.2%**	**33.6%**	**21.2%**	**136**
Graphic designers	32%	15%	32%	21%	69
Product, clothing, and related designers	20%	23%	35%	22%	67
Architecture	**24.3%**	**24.0%**	**38.2%**	**13.5%**	**105**
Architects	27%	20%	44%	10%	53
Chartered architectural technologists	*27%*	*0%*	*73%*	*0%*	*3*
Town planning officers	25%	29%	24%	22%	26
Architectural and town planning technicians	18%	31%	37%	14%	23
IT, software, and computer services	**22.5%**	**25.4%**	**32.6%**	**19.6%**	**478**
Web design and development professionals	32%	28%	29%	11%	57
Programmers and software development professionals	21%	28%	32%	18%	245
IT and telecommunications directors	21%	21%	36%	21%	83
IT business analysts, architects and systems designers	21%	21%	32%	27%	93
Museums, galleries, and libraries	**27.8%**	**24.5%**	**22.2%**	**25.6%**	**43**
Archivists and curators	*41%*	*27%*	*15%*	*17%*	*13*
Librarians	21%	23%	25%	30%	30
Film, TV, video, radio, and photography	**17.2%**	**35.2%**	**38.4%**	**9.1%**	**117**
Arts officers, producers, and directors	20%	37%	39%	3%	53
Phtgrphrs, AV and broadcasting equipment oprtrs	15%	33%	38%	14%	64
Crafts	**12.9%**	**14.8%**	**43.1%**	**29.2%**	**106**
Smiths and forge workers	*39%*	*0%*	*31%*	*30%*	*3*
Glass and ceramics makers, decorators, and finishers	20%	14%	38%	28%	17
Furniture makers and other craft woodworkers	13%	20%	42%	25%	38
Other skilled trades n.e.c.	9%	12%	48%	31%	42
Weavers and knitters	*0%*	*14%*	*34%*	*52%*	*6*

Note: The low N for the occupations in italic font reflects the difficulty of drawing sector wide conclusions. The rows in bold represent the overall CCI sectors

4. Further analysis of LFS data (O'Brien *et al* 2016, Oakley *et al* 2017) suggested imbalances in pay for those working in cultural and creative jobs. These were as a result of gender and social class. There are both 'glass' and 'class' ceilings in cultural and creative occupations. Those working in the same occupation face lower rates of pay as a result of their gender or social class origin.

5. Moreover, these inequalities also have a geographic character. London is obviously an important centre for cultural jobs. The most recent DCMS sector economic estimates suggests a substantial gap between London's creative economy and the rest of the country.

Whilst all areas of the country have seen growth in their creative economies, London has far outpaced everywhere else. Oakley *et al*'s (2017) analysis suggests those employed in London's cultural sector tend to come from significantly more privileged backgrounds. The class pay gap is accentuated by London, whereby even if those from working class social origins enter the labour market for creative and cultural work in London, they still face a substantial pay gap associated with their social class. Crucially this pay gap is irrespective of education.

6. The exclusion of those from working class origins is a longstanding issue for creative occupations. Using data from the ONS's Longitudinal Study, Brook *et al* (2020) estimate that at least since the 1980s, there have been consistently low levels of working-class origin individuals in cultural and creative occupations. This historical data analysis suggests there are structural issues underpinning the lack of underrepresented individuals getting in and getting on in the cultural sector.

7. In a forthcoming research paper, the Arts and Humanities Research Council funded Creative Industries Policy and Evidence Centre has looked at trends in the LFS data since 2014 (Carey *et al* 2020). The 2014-2019 data suggests little change, with similar patterns of class, gender, and racial inequalities in cultural and creative occupations. The 2014 snapshot of creative occupations is therefore a good illustration of the workforce facing the impact of COVID-19.

Why do these inequalities persist?

8. There are a whole range of reasons for these inequalities. Some are grounded in the structure of the labour market for specific cultural occupations. Some are related to individual actions of those hiring and commissioning cultural workers. Some reflect broader social issues. These issues have been summarised by Oakley and O'Brien (2015) and Brook *et al* (2020).

9. There is an oversupply of candidates for particular cultural occupations, and an undersupply for others. The attractiveness of cultural occupations, along with very high levels of competition for each opportunity, shape the labour force for culture. However, the high levels of competition obscure the fact that individuals do not face a level playing field.

10. Many cultural occupations, whether in Film and TV, or the performing or visual arts, are project based. This type of working is associated with high levels of freelancers, as well as quick turnarounds. This means opportunities may not be widely advertised beyond closed, and hard to enter, networks.

11. In areas with more formal institutions, such as museums and galleries, barriers include the high levels of education and specialism needed to access specific posts. These sit alongside the need for experience, which often comes in the form of voluntary, or unpaid, work.

11. Unpaid work is common across most cultural occupations. This takes many forms, whether as underpay for the hours on a project; profit share models that result in no profits;

or internships with low, or no, pay. Whilst Arts Council England has issued guidance making it clear many unpaid forms of work are illegal, the IPPR (2017) noted that creative industries were one of the sectors where internships dominate the graduate labour market. Brook *et al* (2020) estimate that unpaid forms of labour are endemic to cultural work, although the benefits of 'working for free' are stratified by class origin and career stage.

12. Not everyone can afford to work for low or no pay to enter cultural and creative occupations. Nor can they afford access to networks, or the cost of living in London, where the majority of creative and cultural businesses are based. Yet pay and labour market structures are only part of the explanation for the unequal trends detailed in the first section of this submission.

13. The makeup of the workforce influences decisions early in life. Lack of role models, accompanied by the harsh levels of competition and the uncertainties of cultural labour markets mean that, from an early age, some demographic groups do not see the possibility of working in culture as being for them (Friedman *et al* 2017). Access to culture in childhood, cultural education, and family resources are all associated with the early closure of ambitions to make it in culture (Brook *et al* 2020). The government's Creative Careers programme is a response to some of these issues.

14. It is important to note that hiring and commissioning is still shaped by outdated attitudes. Across cultural and creative work, there is substantial evidence that particular jobs are deemed less suitable for women. Examples include directing and producing in the film and television industries (Cobb *et al* 2016). Ethnic minorities are constrained by commissioning and contracting processes in publishing and music, being offered fewer opportunities than their white peers (Saha 2017). Working class origin individuals are assumed to be out of place in the museums, publishing, television, and theatre industries, and subject to various forms of discrimination (Friedman at al 2017, Friedman and O'Brien 2017).

15. On gender, caring responsibilities are more likely to fall to women. There is inadequate support for these responsibilities across specific industries, such as film and television, and theatre (Raising Films 2017, Cornford/PIPA 2017). Where part time and flexible work is possible, it still negatively impacts women's careers, harming their chances of making it to senior roles (O'Brien *et al* 2020).

16. This combination of attitudes and practical issues suggests a long term, structural, set of inequalities in cultural and creative occupations that will be exacerbated by the COVID-19 crisis.

What is the likely impact of COVID-19?

17. The cultural and creative industries are an economic success story for Britain. They are an important source of innovation in the economy. They play a vital role in reflecting the nation on stage, page, and on screen. They are essential to a functioning democracy. Yet, as we have seen, they are highly exclusive. The role of social networks, the need for financial resources to support low or no pay jobs and business risk taking, and the cultural elements in commissioning and hiring decisions, help to explain this exclusivity.

18. COVID-19 will unquestionably make these issues worse. There will be fewer cultural organisations, whether in the arts, in media, music, film and TV, publishing, or in museums; There will be fewer job and project opportunities; Competition for those opportunities will intensify; the winners will be those who already have economic, social, and cultural resources.

19. We are likely to see more women exiting the labour market (partially as a result of demands for childcare, and reflecting what happened in the film industry (Skillset 2009) after the 2008 recession); Fewer ethnic minorities given leading positions; and fewer working class origin individuals across all sectors. In particular, early career creatives will struggle as key moments for career development, for example access to festivals and exhibitions, venues, and associated networks and finance, deprive them of the change to create a track record of success. Depending on the scale of the crisis, this could be a generation of lost talent.

20. There is *already* a crisis in the cultural and creative industries. Policy intervention must prevent it from getting even worse.

References

Brook, O., O'Brien, D. and Taylor, M. (2020) *Culture is bad for you: Inequality in the cultural and creative industries* Manchester: Manchester University Press

Carey, H., Florisson, R., Lee, N. and O'Brien, D. (2020) *Getting in and getting on: class, participation and job quality in the UK creative industries* London: AHRC PEC

Cobb, S., Williams, R. and Wreyford, N. (2016) *Calling the Shots: Women working in key roles on UK films in production during 2015* available from https://www.southampton.ac.uk/cswf/project/number_tracking.page

Cornford, T./PIPA (2017) *PIPA Best Practice Research Project Final Report* available from https://www.raisingfilms.com/wp-content/uploads/2019/01/Raising-our-Game-report-2017.pdf

DCMS (2020) *DCMS sectors economic estimates 2018* available from https://www.gov.uk/government/publications/dcms-sectors-economic-estimates-2018-regional-gva/dcms-sector-economic-estimates-provisional-2018-regional-gva

Friedman, S. and O'Brien, D. (2017) 'Resistance and resignation: responses to typecasting in British acting', *Cultural Sociology,* 11 (3): 359– 76.

Friedman, S., O'Brien, D., and Laurison, D. (2017) '"Like skydiving without a parachute": how class origin shapes occupational trajectories in British acting', *Sociology,* 51 (5): 992– 1010.

IPPR (2017) *The Inbetweeners: The New Role of Internships in the Graduate Labour Market*. London: IPPR.

Oakley, K. and O'Brien, D. (2015) *Cultural Value and Inequality: A Critical Literature Review* available from https://ahrc.ukri.org/documents/project-reports-and-reviews/cultural-value-and-inequality-a-critical-literature-review/

Oakley, K., Laurison, D., O'Brien, D., and Friedman, S. (2017) 'Cultural capital: arts graduates, spatial inequality, and London's impact on cultural labor markets', *American Behavioral Scientist*, 61 (12): 1510– 31.

O'Brien, D., Laurison, D., Miles, A., and Friedman, S. (2016) 'Are the creative industries meritocratic? An analysis of the 2014 British Labour Force Survey', *Cultural Trends,* 25 (2): 116– 31.

Saha, A. (2017) *Race and the Cultural Industries* Cambridge: Policy Press

Raising Films (2017) *Raising Our Game* available from https://www.raisingfilms.com/wp-content/uploads/2019/01/Raising-our-Game-report-2017.pdf

Skillset (2009) *2009 Employment Census* available from https://www.screenskills.com/media/1414/2009_employment_census_of_the_creative_media_industries.pdf