

Led by



with



Audiences and workforces in arts, culture and heritage

July 2024

Emily Hopkins (Creative PEC)

Bernard Hay (Creative PEC)

Mark Taylor (University of Sheffield)

Dave O'Brien (University of Manchester)

The Creative PEC is funded by:



Arts and
Humanities
Research Council

Background to this brief

This policy brief is based on research from Creative PEC's State of the Nations Report, **Arts, Culture and Heritage: Audiences and Workforce**, which uses data from the DCMS Participation Survey, Labour Force Survey and Census 2021, to provide a comprehensive analysis of audiences and workforce. The insights shed light on where progress has been made on inclusion, and where significant inequalities and barriers still exist that require policy interventions.

[Download the report to explore all the data, analysis and findings.](#)

About the Creative Industries Policy and Evidence Centre

The Creative Industries Policy and Evidence Centre (Creative PEC) works to support the growth of the UK's creative industries through the production of independent and authoritative evidence and policy advice.

Led by Newcastle University, with the Royal Society of Arts and funded by the Arts and Humanities Research Council, Creative PEC comprises a core consortium of Newcastle University, Work Advance, the University of Sussex and the University of Sheffield. The PEC works with a diverse range of industry partners. For more details visit <http://www.pec.ac.uk> and @CreativePEC

Citation

If the information in this report is used in any subsequent research and/or publications, please cite as follows:

Hopkins, E. Hay, B. Taylor, M. O'Brien, D. (2024) 'Audiences and workforces in arts culture and heritage'. Creative Industries Policy and Evidence Centre (Creative PEC). doi: 10.5281/zenodo.12806196.

Contents

Executive summary	4
Introduction	5
Headline findings	7
Policy implications	9

Executive summary

Insights from the DCMS Participation Survey, ONS Labour Force Survey and Census 2021 contained in Creative PEC's State of the Nations report, [Arts, Culture and Heritage: Audiences and Workforce](#) provide detailed analysis of the UK's arts, culture, and heritage (ACH) sectors. Significant social inequalities in ACH audiences and workforces are highlighted in the data:

- **Cultural participation is high but uneven:** 90% of people in England engage in the arts, with similar trends in Northern Ireland, Scotland and Wales. Women and white people are found to engage more in specific cultural activities compared to men and ethnic minorities.
- **Cultural engagement has largely recovered post-pandemic:** In-person cultural event attendance has rebounded strongly. Outdoor heritage site visits and cinema attendance remain below pre-pandemic levels. There are no significant increases in digital cultural engagement post-pandemic.
- **Uneven demographic representation across ACH occupations and workforce:** 90% of ACH workers are White and 60% of ACH workers come from managerial or professional households, both of which are higher than the general workforce. There is a higher representation of LGBTQIA+ individuals in ACH workforces than the general workforce. Women only hold 34% of managerial roles but dominate junior positions.
- **Social inequalities in workforce representation persist post-pandemic:** Unequal demographic representation persists post-pandemic, despite workforce numbers remaining the same.
- **Geographical concentrations of ACH workers can be found in the South East of England, and around capital cities across UK nations:** London dominates ACH employment, with boroughs of Hackney, Islington, and Camden leading. Brighton and Hove has the highest concentration of ACH workers outside of London. Belfast and Cardiff are regional hubs in Northern Ireland and Wales, respectively.

Policy implications

The recommendations below suggest how cultural data on equality, diversity and inclusion (EDI) can be better used, captured and embedded:

- Policymakers at a national, regional and local level should embed EDI targets for all place-based ACH interventions.
- Embed robust monitoring and evaluation in policies designed to address inequalities in ACH sectors, drawing on novel data sources and collection mechanisms.
- Make more effective use of existing 'what works' style research to support further data collection and evidence development across the ACH sectors examples?
- DCMS and ONS should examine possibilities for increasing data on EDI within official datasets.

Introduction

Arts, culture and heritage (ACH) play a critical role within the UK's creative industries: not only do they enrich society through cultural experiences and help to generate new ideas, but they also significantly contribute to local economies. Official economic estimates suggest that the cultural sector annually contributes £30.6 billion to the economy in gross value added¹ and accounts for 703,000 jobs². Employment in the heritage sector is estimated at around 207,000 people³.

However, there are entrenched social inequalities in relation to who produces and who consumes ACH – that is, on both the supply and demand sides of the market. These inequalities are not a recent phenomenon. Academic research has, for the past 40 years, demonstrated a vast range of barriers to audience engagement and workforce diversity. There are financial, physical, geographical and perception barriers. There are also exclusionary practices which sustain these barriers.

These barriers and practices lead to the absence of a significant proportion of the population from participation and work in the arts, culture and heritage sectors⁴. Socioeconomic and demographic factors can impact a person's sense on whether culture is 'for them'. Certain art forms and cultural activities may also feel less inviting for members of different social groups. These problems are self-reinforcing, because the perceived lack of representativeness in the workforce inhibits engagement, which leads to a further lack of representation and in turn feeds perceptions about some artforms and cultural organisations.

There are already significant government and industry commitments to tackle equality, diversity and inclusion (EDI) problems in the ACH sectors. The Creative PEC has previously published on this topic^{5 6}, including in [The Good Work Review](#) in 2023, which identified improved diversity and representation as crucial to improving the working lives of those employed across the creative industries.

In central government, the [DCMS Creative Industries Sector Vision](#) committed to ensuring that the creative industries workforce – of which the ACH sectors are a part – 'reflects the whole of the UK' by 2030⁷. National Arts Councils and wider devolved administrations also include EDI at the

¹ [https://www.gov.uk/government/statistics/dcms-and-digital-sector-gva-2022-provisional/dcms-sectors-economic-estimates-gross-value-added-2022-provisional#:~:text=In%202021%2C%20of%20all%20DCMS,sector%20\(%C2%A330.6bn\).](https://www.gov.uk/government/statistics/dcms-and-digital-sector-gva-2022-provisional/dcms-sectors-economic-estimates-gross-value-added-2022-provisional#:~:text=In%202021%2C%20of%20all%20DCMS,sector%20(%C2%A330.6bn).)

² <https://www.gov.uk/government/statistics/economic-estimates-employment-in-dcms-sectors-and-digital-sector-july-2022-to-june-2023>

³ <https://historicengland.org.uk/research/heritage-counts/heritage-and-economy/economic-value/>

⁴ <https://www.local.gov.uk/topics/culture-tourism-leisure-and-sport/cornerstones-culture/section-three-barriers>

⁵ https://pec.ac.uk/research_report_entr/getting-in-and-getting-on-class-participation-and-job-quality-in-the-uks-creative-industries/

⁶ <https://pec.ac.uk/diversity-and-inclusion/>

⁷ <https://www.gov.uk/government/publications/creative-industries-sector-vision>

forefront of cultural and creative strategies^{8 9 10 11}. For example, Arts Council England's [Let's Create](#) 10-year strategy has aims to address inequalities in audiences and workforces across the country.

On the ground, funders and organisations across the creative industries are developing programmes and recruitment practices to enable wider demographic representation in both audiences and the workforce. These range from international foundations such as Jerwood's Creative Bursaries programme which ran until 2022, through to grassroots campaigners such as Arts Emergency.

Despite all the good work happening, the latest data shows that inequality, a lack of diversity, and exclusion persist and impact the likelihood of people engaging or working in the arts, culture and heritage sectors.

This briefing summarises the key insights from our latest State of the Nations (SotN) report, [Audiences and workforces in arts, culture and heritage](#). It covers the report's headline findings, draws out its geographical insights and considers policy implications. Rather than examining models and interventions to improve EDI, this briefing focuses on how EDI data can be better used, captured and embedded in publicly funded programmes across the ACH sectors.

To note, this policy briefing considers the ACH sectors together. As such, the policy briefing is primarily aimed at national and local creative industries and cultural policy officers. Readers interested in more detailed analysis at the level of specific sectors (e.g. music, performing and visual arts / film, TV, video, radio and photography / museums, libraries and archives / publishing), should refer to the full report.

Those interested in ACH workforce data at a local level can also explore our interactive dashboards, which can be found [here](#).

⁸ <https://www.artscouncil.org.uk/lets-create>

⁹ https://www.creativescotland.com/__data/assets/pdf_file/0006/93795/CS-Strategic-Framework-FINAL.pdf

¹⁰ <https://arts.wales/about-us/strategy>

¹¹ <https://artscouncil-ni.org/what-we-do/our-strategy>

Headline findings

1. Workforce inequalities persist in ACH sectors in England, Wales and Northern Ireland, but there are important demographic and temporal variations

Data drawn from the [ONS Labour Force Survey](#) and the [Census 2021](#), provides rich insights into the UK's ACH workforces across a range of demographic factors. The workforce data in this report refers to England, Wales and Northern Ireland, with full data from the Scottish Census due for analysis later this year.

Firstly, based on data from the Labour Force Survey, longstanding inequalities persist across the ACH workforce:

- 90% of ACH workers identified as White, compared to 85% in the general workforce;
- 60% of ACH workers grew up in a household where the main income earner was in a 'managerial or professional' role, compared with 43% in the general workforce;
- Gender divisions exist across occupations - women comprise only 34% of 'managers and directors in the creative industries' despite dominating more junior positions across several artforms.

Secondly, the ACH sectors' record on EDI varies depending on characteristic. For example, occupations in the ACH sectors have smaller fractions of heterosexual/straight people than the rest of the workforce, highlighting where the ACH sectors have strengths in representation that could help inform good EDI practice for different characteristics and for other sectors.

Despite the severe disruptions caused by the pandemic for the ACH workforce, the amount of people working in ACH occupations as their main job has stayed broadly unchanged over the period 2019 to 2023. Between the first and second quarters of 2020, significantly more people left ACH occupations than joined them. The demographic makeup of those in ACH occupations has also remained consistent in most ways post-pandemic. This means longstanding inequalities persist, even in the context of the huge disruptions of the pandemic.

2. Cultural engagement is high yet uneven across the four nations of the UK

There are stark differences around who attends what kind of cultural activities. This is the case even when overall engagement with the arts, culture and heritage sectors is high across the Four Nations of the UK.

- 90% of people in England had engaged in the arts in some way, with similar figures overall for the rest of the UK.
- In England, 64% of respondents to the Participation Survey said they 'read for pleasure', making this the cultural activity with the highest rates of participation. Photography as an artistic activity, crafts and making art (painting, drawing, printmaking and sculpture) all had around 15% of the population participating, and activities such as game design or making

films or videos had 5% or less.

- Cultural participation data also shows national trends and tastes, with, for example, much higher proportions of the population in Scotland participating in dance, and higher proportions of attendance at historic places in England.

Differences in participation and attendance can also be observed in relation to different groups such as disabled people, ethnic minorities, and different social class groups. These differences highlight where policies can be more tailored to increase inclusion and representation for specific subsectors or activities. Key findings include:

- Gender gaps: Far more women (38%) than men (22%) have attended theatrical performances; read for pleasure (71% compared with 57% of men); engaged in painting, drawing, printmaking or sculpture (19% compared with 9%) and participated in crafts (21% compared with 9%).
- There were few activities where more men had participated than women: playing video games (41% compared with 31% of women); composing music (8% compared with 5%); and making films or videos (4% compared with 2%).
- Ethnicity gaps: 41% of White people had visited historic landscapes, compared with just 11% of Black people - showing where interventions could be tailored to develop connections with heritage for new underrepresented audiences.
- Disability gaps: Disabled people are more likely to write stories, plays, or poetry, and more likely to engage in crafts. In fact, there is no form of cultural participation where people who are not disabled are significantly more likely to participate.

3. Cultural engagement has recovered post-pandemic, though digital participation rates have not increased on the pre-pandemic rates

As expected, cultural engagement has recovered since the end of lockdown restrictions, though with some important differences across the ACH sectors relative to pre-pandemic rates:

- Attendance at cultural events that take place at specific times within buildings (e.g. theatre) increased substantially after pandemic restrictions were lifted
- Attendance at cultural forms that do not require presence at a specific time - such as visiting an art exhibition - have increased, but at a more modest rate
- Attendance at outdoor heritage sites (e.g. gardens, parks, monuments) have seen smaller increases on comparison with pre-pandemic rates
- By early 2023, attendance at live music events was even higher than prior to the pandemic
- Attendance at the cinema has dropped since before the pandemic; by early 2023 just over half the population had attended a film at a cinema in the last twelve months, compared with nearly two-thirds before 2020

Interestingly, the analysis of the data in the SotN report does not show high levels of transition from in-person to digital cultural offers, with post-pandemic participation being significantly higher for in-person and/or in-home activities. Cultural engagement patterns are slow to change over time, so analysis will need to be long-term to show if any new trends emerge.

4. London remains as the dominant location for those working in arts, culture and heritage jobs

The Census 2021 data allowed in-depth analysis on the locations of those employed in the ACH sectors across England, Wales and Northern Ireland. This provides a geographic picture of the locations of cultural workers down to a local authority and even a ward level.

Given the long-term importance of London as a centre for artistic and cultural work, it is unsurprising that the ten local authorities with the largest fractions of people in these occupations are all in London – with Hackney (8.6%) Islington, Camden (both 7.3%), and Haringey (6.8%) leading in terms of proportion of residents employed in the arts, culture and heritage sectors.

Reflecting Brighton's 'importance as an arts and cultural hub'¹², Brighton and Hove come in as the local authority outside of the capital with the largest percentage of people in cultural occupations, in twelfth place with 4.7%.

In Northern Ireland, the local government district with the largest amount of people working in arts, culture and heritage occupations is its capital city Belfast, with 18.2%. In Wales, hotspots of employment can be similarly seen in its capital of Cardiff, but also in Ceredigion.

Policy implications

The analysis in this report suggests that the significant and ongoing inequalities in ACH audiences and workforces need equally significant policy interventions. There are numerous approaches examined in the existing research base.

Rather than examining these models and interventions to improve EDI in the ACH sectors, this briefing focuses on how EDI data can be better used, captured and embedded in publicly funded programmes, and the role of Government in improving this evidence base further.

Policymakers at a national, regional and local level should embed EDI targets for all place-based ACH interventions.

New evidence is essential for developing up-to-date, data-driven policies that can address inequalities in cultural engagement and employment. Policymakers should explicitly embed EDI targets into place-based cultural interventions, drawing on existing data to ensure there is a baseline level to track progress against over time. There is particular importance in ensuring that

¹² https://pec.ac.uk/state_of_the_nation/geographies-of-creativity/

an intersectional approach is taken. Furthermore, monitoring and evaluation of diversity and inclusion programmes needs to involve robust methodologies with comparators, as current evaluations can be of variable quality.

Local data on cultural occupations can be drawn from the [interactive dashboards which accompany this report](#), providing insights at a local authority and electoral ward level across England, Wales and Northern Ireland. Having data broken down at a subsector and demographic level allows policymakers to identify specific areas for support. The geographic lens will also be essential for government and industry to understand where ACH workers are located (which may be read alongside the Creative PEC's [Geographies of Creativity report](#) for further place-based insight).

Embed robust monitoring and evaluation in policies designed to address inequalities in ACH sectors, drawing on novel data sources and collection mechanism.

The report highlights the persistent inequalities across the arts, culture and heritage sectors, adding to the case for strategic actions to address EDI problems. Yet direct questions of 'what works' to address these issues are often absent from policy discussions. The following suggestions are made:

- Research and evaluation on ACH audiences and workforces needs to consider EDI across a broad range of characteristics (and their intersectionality) and across whole life courses to give a complete picture.
- Robust monitoring and evaluation of EDI programmes should be embedded across the ACH sector to help inform the growing evidence base on which EDI actions are most impactful.
- Data collection mechanisms at a local and/or regional level could be designed to inform impact frameworks published by central government (e.g. the Outcomes Monitoring Framework that was set out in the DCMS Creative Industries Sector Vision, or the Creative Industries Council's Charting Progress Tool¹³). Streamlining data on sector wide targets could help creative subsectors to more accurately measure against their own goals.

Make more effective use of existing 'what works' research.

Policymakers are encouraged to utilise these new report findings alongside wider key reports, such as:

- The Creative PEC's [Good Work Review](#), which undertook analysis on structural features of the wider creative industries labour markets to identify critical issues and evidence gaps. The review found support for the delivery of government-led legislation to set baseline

working conditions for the creative industries – including arts, culture and heritage – with equality and protection against discrimination as a key feature.

- The Creative Diversity All Party Parliamentary Group [Creative Majority report and policy recommendations](#), published in 2023 to understand ‘what works’ in improving equality, diversity and inclusion in the creative sector. This called for more education on workplace diversity responsibilities, better access to data on workforces to measure change, and improving access to cultural activities to allow wider engagement from a young age.
- The House of Lord’s [‘At risk: our creative future’](#) report, which recognised the historical issues with equality, diversity and inclusion across the creative industries and in particular the number of creative workers from a diverse background who left the sector following the COVID-19 pandemic.

DCMS and ONS should examine possibilities for increasing data on EDI within official datasets.

Survey data providers in central government – such as DCMS and ONS - should consider ways to increase data on EDI in existing surveys, such as oversampling minority groups to allow for more statistically robust, higher resolution analysis to improve the ability to draw insights on specific demographic sub-groups and on intersectionality.

Furthermore, to provide an even fuller picture, greater exploration of non-standard datasets on engagement and participation in the ACH sectors should continue to be undertaken. ONS’s data on spending in the UK via credit and debit card purchases, for example, has resulted in new knowledge around ticket bookings for cultural events¹⁴.

Data from non-statutory sources could contribute towards the building of the bigger picture on culture. Creating opportunities for making datasets on cultural consumption from the likes of Netflix, Spotify and other private sector sources more accessible for research use could generate insights in relation to specific sub-sectors that can inform policies. This would also help to ensure that policymakers can keep policies in step with engagement with cultural practices as they evolve in the digital age.

14

<https://www.ons.gov.uk/economy/economicoutputandproductivity/output/datasets/ukspendingoncreditanddebitcards>