

Response to Senedd Enquiry from Media Cymru

[Media Cymru](#) is a collaboration to accelerate growth in Cardiff Capital Region's (CCR) media sector, making it a global hub for innovation. Media Cymru brings together 23 organisations from across Wales, including education, broadcasting, technology, media production and local leadership partners to drive inclusive, sustainable economic growth in the screen industries by addressing future skills needs, increasing job opportunities and creating more innovative companies. Consortium members include: BBC, Cardiff Metropolitan University, Cardiff University, Ffilm Cymru Wales, S4C, University of South Wales, and Welsh Government.

As part of this five-year, Strength in Places Fund programme we are undertaking significant and in-depth research into the future development of the screen workforce in Wales, with our focus specifically on skills, training and innovation. Our research aims to provide new knowledge and evidence into needs of the media sector as part of the creative industries in Wales and impact policy. In October 2022, Media Cymru will launch our first annual pan-Wales Screen Industries Workforce Survey, conducted by our academic researchers at USW's [Centre for the Study of Media and Culture in Small Nations](#) who have previously authored surveys on the Film, TV and Games industries for Clwstwr and Creative Wales.

[Our response to this Enquiry:](#)

Media Cymru's focus is specific to the screen industries in Wales - which we include under Wallis and Van Raalte's categorisation as: Film, Unscripted TV, High-end TV, Children's TV, VFX, Animation and Games - so we have confined our responses, evidence and recommendations to this enquiry to this subsector of the creative industries. In our [Creative Industries Report](#) we found that in 2019 the creative industries employed more than 42,200 employees in Wales, roughly 3% of total employment, with more than 20% of these being employed in the Film, TV, Video, Radio and Photography sector (about 9,000). The sector is highly agglomerated in the CCR. Data from our more recent [Report](#) shows that between 2005 and 2018, the number of firms in film/TV production grew by 79% in the CCR. All our recommendations can also be applied to the creative industries workforce generally.

Our [key recommendation](#) is that we use the opportunity of this enquiry's coincidence with the launch of our annual **Wales Screen Workforce Survey** (October 2022) which aims to empirically evidence all of the issues outlined below and provide a basis for effective future Government-supported policy, skills and training strategies in Wales.

Our [other recommendations](#), responding to the specific questions posed by the Enquiry, are:

1. [What is the current health of the sector's workforce, including the impacts of the pandemic, Brexit and cost of living crisis? Have workers left the sector, and what impact has this had?](#)

Career opportunities for creative industries workers in Wales in 2022 are unprecedented. A boom in production, largely fuelled by COVID-19 recovery and the demands of high end (HETV) drama commissions for streaming video-on-demand services like Netflix and Amazon Prime, plus a general talent shortage, is placing high demands on the workforce of the screen sector across the UK in 2022, and Wales is at the forefront of this. There remains a significant demand for skilled labour across the UK screen industries, with the [BFI Skills Review](#) (June 2022) predicting a potential additional 20,000

new jobs required within the next five years. However, the current levels of growth and investment into Wales, though significant, largely remain specific and short-term and this has so far not aligned to an effective skills and workforce strategy that can support both scripted and non-scripted content production. Our [Clwstwr Policy Brief](#) from 2020 showed that 4 out of 5 creative businesses in Wales are concerned about Brexit's impact and already experienced a decline in business.

Without a long-term vision for what the screen sector should look like, Wales risks failing to consolidate its recent gains in the face of global competition from other territories in Europe and worldwide that can couple fiscal incentives, such as tax relief, with coherent workforce development.

There is also significant new evidence that the perceived shortage of talent within the industry is driven in no small degree by the failure of the industry to provide development opportunities and a supportive working environment. The forthcoming Creative Industries [Policy and Evidence Centre \(PEC\)](#) Good Work Review, and Wallis and Van Raalte (2022) both suggest that this failure has more impact on the overall health and future efficiency of the workforce than the prevailing industry view that growth is being held back by a lack of entry level skills.

In 2021 we published Screen [Survey Wales](#), which partly mapped the impact of COVID-19 on the screen industries workforce. The research saw 55.6% of companies and 26.9% of freelancers surveyed list remote working as the main change to working patterns as a result of COVID-19. Significantly, 15.3% of freelancers listed longer working hours on set as a direct result of changes to working patterns to comply with COVID-19 safety measures, and as many as 66% of freelancers had contemplated leaving the industry due to concerns around mental health and wellbeing.

However, the long-term impact of COVID-19, Brexit and the current cost of living crisis have yet to be fully assessed. As we have noted previously, an [annual](#) screen sector Survey is urgently required to accurately map the changing workforce and its current skills and training needs, and to ensure that evidence underpinning any Government strategy remains current and reflects changing market conditions.

Any assessment of the current 'health' of the screen industries workforce must also incorporate a number of factors that have historically proved difficult to capture:

- (a) It remains difficult to truly map the size and scale of the screen industries workforce as a whole due to issues around self-identification and siloing. Through [Clwstwr's Creative Economy Atlas](#), we have tried to fill the data gap and further develop mapping exercises. Also Media Cymru has taken a holistic approach to the definition of the Wales 'screen industry', including video games, visual effects (VFX), animation and virtual production alongside scripted and unscripted TV and film, with the intention of creating an inclusive new database. This new database will be particularly relevant for crossover areas such as Virtual Production, Animation and VFX.
- (b) The contribution of freelancers to the screen industries in Wales remains hugely significant, representing more than 70% of the current workforce. Clearly their experiences, support and development needs must be better appreciated and should frame discussions on skills and training requirements. Our Wales Screen Industries Workforce Survey and further additional research will focus on ensuring we produce accurate and qualitative data that reflects the broader freelancer workforce experience.
- (c) There is also a need to look beyond the CCR for an accurate reflection of the whole nation's screen industry. The [Cultural Freelancers Report 2022](#) found that about 41% of cultural freelancers in Wales are located in rural areas, a pattern that cuts across different occupations. Though CCR is home to the majority of the screen sector workforce in Wales, there are two further significant Film and TV micro-clusters outside the CCR, in North-West Wales and South-West Wales ([Screen Survey Wales 2021](#)). The same is true

for video game development, with secondary clusters in Swansea and North-East Wales supplementing activity in the CCR ([Games Survey Wales 2021](#)). Media Cymru's research and our strategic skills and training interventions will take a **pan-Wales** approach that reflects the differing needs of these discrete clusters.

More generally, both the forthcoming PEC Good Work Review and Wallis and Van Raalte (2022) provide compelling evidence that a significant cultural change is required across the screen sector in general, in order to improve working hours and conditions, eliminate toxic behaviour, and strengthen the ability of the workforce to feel protected. In collaboration with partners including Creative Wales and Welsh Government, Media Cymru is committed to building an accurate evidence base which can drive systematic change in management and workplace practice, enhance opportunities for professional development and give the creative workforce a sufficient voice.

2. How financially stable is the sector and how suitable are pay and working conditions?

Though the sector is undergoing a period of unprecedented growth, it remains significantly less stable and more subject to the impact of major social and economic events (COVID-19, Brexit, cost-of-living) than other sectors of the economy. The [Cultural Freelancers Report 2021](#) found that 92% of freelancers indicated that their work has been negatively impacted by COVID-19, with half losing 80% of their work in 2021. A deeply embedded and dynamic freelance culture and lack of regulation/pay structures, the predominance of micro-SME companies in the production delivery pipeline, plus contractual short-termism and significant fluctuations in skills and labour requirements all add to this instability.

Not surprisingly, this instability has created huge variations in pay and working conditions, which recent events have only exacerbated. On the one side, talent shortages – even prior to cost-of-living inflation – have led to spiralling wage inflation in specific employment areas. At the same time, the pressure of heightened production and delivery deadlines has led to reports of excessive working hours, workplace bullying and challenging working conditions. A deeper understanding is clearly needed; this will be a key element of both Media Cymru's Wales Screen Industries Workforce Survey and our subsequent freelancer ethnographic research.

3. How equal, diverse and inclusive is the sector? How can this be improved?

In short, the sector is currently neither sufficiently equal, diverse or inclusive. The [Cultural Freelancers Report 2021](#) found that in Wales minorities and disadvantaged groups earn on average far less and also face barriers to support. Notable inequalities in gender balance across Wales endure, with only 38.4% of freelancers and sole traders identifying as female in 2021's Screen Survey Wales. Workers with identified disabilities are also poorly represented – only 5% of Screen Survey Wales responses were from individuals who identified as having a disability or long-term health condition. Even more concerning is that only 2.5% of the survey's responses were from those identifying as being from any non-white ethnic background.

The Media Cymru Wales Screen Industries Workforce Survey will look to provide a more granular set of industry demographics, as well as a consistent evidence base that can be updated annually. The aim is not only to capture the current landscape of diversity and inclusion, but to track significant broadcaster initiatives and the efficacy of these initiatives to effectively improve inequalities. There is also a need to assess the benefit of engaging the screen industry with the Government's *Cymraeg 2050 Welsh Language Strategy*, using interactive media and screen content to support the stated aim of reaching 1 million Welsh speakers by 2050.

Archaic and opaque recruitment methods are at the heart of this problem. We have previously highlighted how informal recruitment processes and short-termism have had a deleterious impact on fostering diversity and inclusivity, and also make it difficult for talent from lower socio-economic backgrounds to break into the industry.

Access to transport and mobility remain tangible impediments to those from lower socio-economic backgrounds joining the screen industries, especially at entry level. Film and TV production in particular is heavily reliant upon an efficient transport network and physical infrastructure. Creative clusters are located along the main routes in and out of Wales; the 'M4 corridor' for South Wales, but also the A55 between the North Wales screen cluster and the screen production hub in North-West England (Salford Quays). Several companies have noted that they have lost work to companies outside of Wales due to their proximity to the main arteries of the M4 and A55 (Screen Survey Wales 2021). Working with Ffilm Cymru, Media Cymru is also conducting research into the challenges posed by the (lack of) transport infrastructure to both companies and freelancers working across Wales.

Media Cymru will enable a long-term study of screen sector freelancers, charting career progression and pathways over multiple years. We will help generate a rich data set to better understand the structural elements in place that prevent greater diversity and inclusivity in Welsh screen work, in terms of ethnicity, gender identity, physical and neurological disabilities and socio-economic background. This long-term engagement will also help chart governmental and broadcaster initiatives and interventions to measure if they are successful in promoting positive, long-term change, and encourage the adoption of those that do as best practice.

4. How sufficient are skills and training opportunities? Are there gaps, and how should they be filled?

There were numerous skills gaps impacting the screen industry pan-Wales highlighted by our survey in 2021. Among the roles identified by more than one respondent in Film and TV were a lack of editors, edit assistants, researchers and producers (Screen Survey Wales 2021). These continue to present significant challenges to the industry's growth and wellbeing now. There are a range of established education, skills and training providers already working within the sector and, as a response to the recent growth and skills shortages highlighted above, there have been a number of new skills and training initiatives aimed at addressing immediate talent needs.

However, there is also significant anecdotal evidence that there remains a lack of awareness and – crucially, a lack of capacity - among staff working in a demanding industry to identify and engage with these initiatives. Consequently their real and long-term impact remains limited. There is also a strong desire from leading companies within the sector to see investment in sustained medium and long-term skills development, rather than relying solely on short-term initiatives. The [2022 BFI Skills Review](#) noted that medium and long-term investment is seen by industry as vital in supporting both the private and publicly funded training sectors, but there remains a need for significant strategic investment to support innovation in areas that do not lend themselves to “quick wins”.

Media Cymru has a skills-focused research strand looking to inform forward-looking skills and innovation for continued screen sector growth. We are developing a broad-based strategy that will complement the numerous training initiatives already in place (Ffilm Cymru, ScreenSkills, HE/FE provision) with a commitment to effective, accredited and R&D-specific training programmes that reflect these longer term needs of the sector. These interventions will encourage entry level opportunities, but also focus on helping to sustain and nurture upskilling within the industry, and in generating and supporting new professional and business opportunities at its highest levels.

At entry level, improved careers information and guidance is needed that links the new Wales Expressive Arts curriculum to the range of screen industry careers and ensures a growth in entry-level talent. Students, parents and teachers can all benefit from an improved understanding of the different types of careers and pathways into the screen sector across Wales. Understanding and lowering barriers to entry is a foundational motivation for the Media Cymru programme. Targeted grassroots support for screen sector development is needed to enable Further Education, Higher Education, and industry to build accessible progression routes into sustainable screen careers in the region.

Within the industry itself there is a need to revise training, mentoring and upskilling opportunities to reflect the post COVID-19 realities of geographical and social diversity. When surveyed, 55.6% of companies listed remote working as the most significant change to working patterns in the screen sector over the past 18 months. But there remains a concern about how mentoring and shadowing can be meaningfully undertaken when people are not physically in the same space. Again, the effective way to assess this fluid and ever-changing structure is through an ongoing annual survey.

At the higher end, there remains a need to nurture and develop business leaders and promote intellectual property (IP) generation, supporting Wales-based companies to compete internationally. Based on the recommendations of the Screen Survey Wales 2021 report, tailored business skills development for Wales' screen sector SMEs will be a core element of Media Cymru's plan on skills and partnership with industry.

5. What has been the impact of support from public bodies such as the Welsh Government, and is further support needed?

Over the last 5 years there has been a growing recognition that the screen industries can contribute significantly to the future success of the Welsh economy. Welsh Government initiatives including Creative Wales have put in place funding to support and strengthen existing companies, to maximise inward investment, and to develop skills and training funds that will help to nurture production talent. Comparisons with other national and regional support for the screen industries suggest that Wales status as a devolved nation provides considerable benefits by facilitating a more 'joined up' approach to connecting government funding, industry needs and skills and training funding. As Screen Survey Wales 2021 noted, the Wales Cultural Recovery Fund provided significant and effective support for both companies and (freelance) workers in the sector throughout the most difficult period of the pandemic, with a positive impact on the sector's ability to recover from the worst financial impacts of COVID-19.

However, Creative Wales' most effective work hitherto has been remedial and reactive. Long term and strategic government intervention, especially in the coordination of skills and training provision, is crucial. The new Creative Wales Action Plan should provide new focus for a coordinated and strategic basis for this support; a business without a strategy and direction is destined to fail.

There is now a great opportunity to utilise the current strength of the screen industries and the lessons learned from the pandemic to make significant interventions that will underpin our shared future success. Through the research we are undertaking and the skills and training initiatives we are developing, Media Cymru can make a major contribution to the long-term health and future success of the screen industries in Wales, and we will do everything we can to be effective partners going forward.

Tom Ware

On behalf of Media Cymru, supported by:

Justin Lewis (<https://www.cardiff.ac.uk/people/view/182947-lewis-justin>)

Sara Pepper (<https://www.cardiff.ac.uk/creative-economy/people/director-of-creative-economy>)

Marlen Komorowski (<https://www.cardiff.ac.uk/people/view/1585776->)

Kayleigh McLeod (<https://www.cardiff.ac.uk/creative-economy/people/creative-economy-project>)

Ruth McElroy (<https://www.bangor.ac.uk/staff/arts-culture-language/ruth-mcelroy-100071/en>)

Helen Davies (<https://staffdirectory.southwales.ac.uk/users/helen.davies1.html>)

James Davies (<https://staffdirectory.southwales.ac.uk/users/james.davies1.html>)

Richard Hurford (<https://staffdirectory.southwales.ac.uk/users/richard.hurford1.html>)