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Deputy Minister for Arts, Sport and Tourism



Llywodraeth Cymru
Welsh Government

Delyth Jewell MS
Chair
Culture, Communication, Welsh Language, Sport and International
Relations Committee

18 July 2023

Dear Delyth,

Inquiry into the challenges facing the creative industries workforce in Wales

Thank you for your letter of 21 June seeking additional information following my attendance at the Culture, Communications, Welsh Language, Sport and International Relations Committee on 25 May 2023. My responses to the additional information requested are set out below.

Objectives for the creative industries sector

The Welsh Government's key objectives for the creative industries are set out in our priorities document [Priorities for the Creative Industries Sector in Wales \(English\).pdf](#). Our objectives are also aligned to our Programme for Government commitments related to skills and research development for the creative industries.

Creative industries survey data

A link to the findings of Creative Wales' first industry survey can be found [here](#). The intention is to run this survey on an annual basis, with this year's due to go live in July 2023. It is anticipated that the final report will be available publicly in Autumn 2023 and published on the WG website. As requested, a link to the report will be shared with the Committee when available.

Support for the Arts and Music sub-sectors

Arts

The Welsh Government has allocated an additional £1m of funding to support cost of living pressures in the arts sector via the Arts Council of Wales with £500k for 2022-23 and £500k for 2023-24. ACW have provided a breakdown of Cost of Living Awards made to its existing portfolio, this includes a number of organisations whose key focus is music and many more

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

who have a significant element of their work that falls under the 'music' category. On 19 June ACW also launched a cost-of-living top up for existing grants. There will be four application rounds that run until January 2024.

Music

Since its launch, Creative Wales has provided support to a range of businesses which make up the multi-faceted infrastructure of the live music sector. At the heart of the industry are the live music venues often regarded as the Research and Development department where artists learn their trade. Information on the schemes delivered to date to support the music sector is set out below:

Grass roots music venue pilot scheme 2020	Capital investment scheme for venues introduced just before covid outbreak which quickly developed into the recovery fund	£19,500 to 4 venues
Grass roots music recovery fund 2020	The very first support in the UK created to assist the music venues at the start of the COVID-19 outbreak	£401,551 to 22 venues
Music Capital fund 2021/22	The £10k maximum grant enabled the Music Industry to invest in its own recovery and growth following the pandemic by encouraging a step change to the industry's facilities, for the benefit of artists and audiences	£511,703.44 to 56 live music venues, recording studios, and rehearsal spaces
Music Revenue Fund 2022/23	Revenue funding of up to £10,000 for music labels and music management businesses to provide additional support and stronger campaigns around planned releases to improve their commercial outlook and sustainability	£129,000 to 13 businesses
Music Capital Fund 2023/24	A competitive Capital Fund aimed at supporting live music venues with larger scale capital projects	£200,000 allocation - Closing date for applications 14 July 2023.

These projects complement the funding awarded to the music sector through the Cultural Recovery Fund (CRF) which provided:

- CRF1: £4.2m to 72 venues
- CRF2: £2.56m to 60 venues and suppliers
- CRF3: £1.24m to 59 venues and suppliers

Turnover in each sub-sector supported by Creative Wales over the past three financial years.

Turnover from 2019-2021 by subsector

Sector	2019	2020	% change	2021	% change
Creative Industries	£1,643m	£1,640m	-0.2%	£1,705m	4.0%
Screen	£531m	£424m	-20.2%	£575m	35.6%
Music	£194m	£321m	65.5%	£349m	8.7%
Digital	£289m	£269m	-6.9%	£270m	0.4%
Publishing	£612m	£614m	0.3%	£503m	-18.1%
Emerging	£257m	£245m	-4.7%	£239m	-2.4%

Audience attendance

Arts

ACW has gathered information on audience figures through its Arts Portfolio Wales 2022/23 survey. A link to the survey highlights is provided - [Arts Portfolio Wales Survey Highlights 2021/2022](#). These results show a slight increase in figures for the last full financial year, but these figures have not yet reached pre-pandemic levels. Comparing these figures with the Audience Agency data from November 2022, it highlights that Welsh and Scottish audiences are slower to return to face to face cultural activities than English Audiences.

Music

Information relating solely to audience figures in Wales isn't currently collected. However, Creative Wales' close relationship and regular content with venues through its music stakeholder group allows us to gather reliable intelligence on issues such as audience levels and ticket purchasing trends. In addition, evidence gathered by representative bodies such as the Music Venues Trust are also used as a source of evidence to understand general trends. The Music Venues Trust annual report, which includes information on venues and attendance at a UK level can be found through this link - [MVT Annual Report FINAL web-enabled Single-Page-version.pdf.pagespeed.ce.9aZNccFsbl.pdf \(musicvenuestrust.com\)](#).

Wellbeing facilitators

The Welsh Government is keen to identify opportunities to learn from good practice elsewhere to support improvements in employee management and workplace culture in Wales. Creative Wales is working closely with the UK wide Film & TV Charity with a view to including *The Whole Picture Toolkit* as a recommendation within the Creative Wales Production Funding guidance notes to encourage managers and creative leaders within the Welsh screen sector to look after their team's mental health.

The live music sector and other creative areas are keen to follow the lead taken by the Wellbeing Facilitator project in the screen sector. As a result, the second year of the Wellbeing Facilitator pilot scheme, which is union led and funded by Creative Wales, will review and identify how this model could work across other sectors.

Creative Wales has recently provided funding, via the Creative Skills Fund, towards the project Empowering Creative Freelancers Pilot which has trained 15 Mental Health First aiders across the four creative unions working in Screen, Digital and Music.

We continue to engage with the creative industries Policy and Evidence Centre (PEC) review of working practices in the creative industries. My officials recently met with PEC to discuss options to further support fair work in the creative industries in Wales in response to the recommendations set out in the PEC report. This includes utilising the UK wide network

developed to support the review work to look at the roadmaps being developed by other administrations in response to report findings to identify opportunities for learning.

Activity supported by Creative Wales

Detail on the 17 projects funding through the Creative Wales Skills Fund, including amount awarded to each project, is available at **Doc 1**.

Equality, diversity, and inclusion

Equality, diversity and inclusion projects

The following three projects funded through the Creative Skills Fund are designed to support and improve ED&I within the screen sector:

- Re-Focus project run by Hijinx - ReFocus is experiential Learning Disability Inclusion training for the screen industry which aims to address the chronic shortfall in representation of learning disabled and/or autistic people on screen and behind camera. There are two parts to this project: the first will provide one day, in person training which uses 'relaxed forum theatre and role-play sessions, led by Hijinx actors with learning disabilities and/or autism'. The sessions reflect everyday scenarios, providing real-life examples from situations on set, in post-production and during the development process of a screen project. The second part of the project is the establishment of a Creative Enabler Agency, providing trained Creative Enablers (CEs) to the sector to support people with learning disabilities/autism access work. Funding would support the training of a pool of CEs who could then be booked by productions.
- rad Cymru Wales project is run by training provider TRC. Creative Wales is funding the second year of this project, in partnership with BBC Cymru Wales and Channel 4. This scheme provides a paid eight-month traineeship for eight trainees based within eight Welsh independent television production companies. This initiative helps to remove barriers and enable people from under-represented backgrounds to access paid placements, training and guidance.
- Culture Connect Wales (CCW) run by Watch Africa CIC is a project Creative Wales funds in partnership with the broadcasters; BBC Cymru Wales, ITV Cymru Wales, S4C and Channel 4. Now entering its third year, CCW supports diverse talent in finding opportunities in the film and TV sector in Wales. Run by and for the community, CCW promotes jobs and opportunities, offers advice and support for people looking to get into the sector.

The Beacons project, also funded by the Creative Skills Fund is developing a number of new strands of support which will focus on developing skills for a diverse and healthy new workforce in the Welsh music industry, including:

- Resonant; aims to empower young people (aged 18-25) identifying as marginalised genders, to work behind the scenes in the Welsh music industry.
- SUMMIT 2024 an innovative music industry conference, designed and delivered by young people for young people in Wales. (Fourth summit held)
- Bwts - a new bilingual series of career awareness videos illuminating important routes into the music industry workforce. This series will provide an insight into the experiences of music industry professionals working in Wales and help young people to confidently plan their futures
- Transform Music to develop a training package alongside training providers Umbrella Cymru, Wales' Gender & Sexual Diversity support specialists. This partnership will focus on making music industry spaces in Wales safer for, and more inclusive of,

transgender and non-binary people. Once designed, this training package will be delivered to six music industry stakeholders across Wales.

In the digital sector, Creative Wales is supporting two new skills projects via the Creative Skills Fund:

- Games Foundry Wales, run by Iungo Solutions is a nine-month programme to allow multiple entry and exit points to service a range of technical roles within the games industry. The Foundry will target underrepresented career changers and underemployed people, supporting them to upskill for roles in games design and games development.
- Gêm is a stand-alone entry level Gaming Hub to support the strategic development of training provision that covers entry level requirements at levels 1, 2 and 3 on a BTEC framework with the aim to develop a creative workforce which reflects all communities. Gêm is run by Media Academy Cymru who have extensive experience of working with marginalised young people.

In addition, in the publishing sector, the Books Council of Wales has received funding from Creative Wales to deliver two phases of its New Audiences Fund. The Fund was developed in recognition of the challenges related to diversity and inclusion in the sector. It focuses on supporting content that reflects people of all ages and backgrounds and fair representation in the sector.

Equality, diversity and inclusion data

The Creative Wales annual statistics include breakdowns in relation to diversity data. This includes age, sex, ethnicity and disabled workers. The diversity data sets are available publicly and can be found [here](#), with these due to be updated with the 2022 data and published on the Welsh Government website by the end of the summer 2023.

The current data sets for Wales show that:

- On average, during 2019-2021, 40-49 year olds made up just under a quarter (24%) of those employed in the Welsh creative industries, the most represented age group within the sector.
- In 2021 there were more males working in the creative sector than females, at around 53% and 47% respectively.
- In 2021 97% of those in employment in the creative industries were White.
- In 2021, 4,000 people employed in the creative industries were disabled, accounting for 11% of total employment in the sector.
- During 2019-2021 an average of 21,500 people (approximately 60%) employed in the creative industries in Wales had an education at degree level or equivalent each year. This compares to the national average for all industries of 39%.
- During 2019-2021, approximately 4% of those employed in the creative industries had no qualifications. This is lower in comparison to the national average of 8% for all industries in Wales.

The Creative Wales Industry Survey also collects data on ethnicity, although this is limited to respondents who are business owners, directors or partners. The findings from 2022 showed that 94% of owners, directors and partners who were surveyed were White, 1% were from mixed/multiple ethnic groups and 1% were Asian/ Asian British. When comparing the data by region, north Wales had the highest proportion of owners, directors and partners surveyed who were White (99%), and mid Wales had the lowest (87%). When comparing the data by sector, owners, directors, and partners surveyed in the screen sector showed the most diversity in terms of ethnicity (94% White, 3% mixed/multiple ethnic groups and 2% Asian/ Asian British). However, it is evident from these figures that ethnic representation

was still not reflective of the population averages. The digital sector was the least diverse sector, with 100% of owners, directors and partners surveyed being White. A link to the full report and outline of findings can be found [here](#).

Skills development

Work being done to ensure all young learners can consider accessing further and higher education courses related to the creative industries

The Welsh Government's Young Person's Guarantee (YPG) is a Programme for Government commitment and offers young people aged between 16 to 24 in Wales dedicated support to gain a place in education (including Further and Higher Education) or training, find a job or become self-employed.

As part of that commitment, we have provided £2m so that every FE college in Wales now has an enhanced Employment and Enterprise Bureau. Colleges have hosted a range of careers events involving alumni, employers, entrepreneurs, those providing alternative post FE support and Universities, amongst others - providing learners with the opportunity to connect and explore career pathways and options across a range of sectors including the Creative Industries. The bureaus deliver a range of other one to one, masterclasses and larger scale support, working with key partners, such as employers, regional skills partnerships, Careers Wales and Working Wales. Outcomes from employer visits to Bureaus have included organised work experience placements at companies.

In addition, the Inspiring Skills Excellence in Wales project supports young people to achieve skills excellence. The project provides the infrastructure for Skills Competition Wales which provides young people with the opportunity to challenge, benchmark and raise their skills by taking part in competitions across a range of sectors. A number of competitions are held for the creative industries including 3D Digital Game Art, Fashion Design and Technology, Graphic Design, Digital Media Production and an Inclusive Skills: Media competition.

Furthermore, Jobs Growth Wales+, our flagship training and development programme for 16-19 year olds, supports those who need the skills, qualifications, and experience to progress onto an Apprenticeship, set up their own business or land their dream job. This includes courses on IT & Digital Media targeting careers in IT, Computing and Creative Media sectors.

Careers Wales work with all secondary schools, special schools, Pupil Referral Units (PRUs) and colleges supporting young people to become more effective at planning and managing their careers in an ever changing and complex job market. This offer includes:

- At Key Stage 3 understanding how their subject option choices can impact their future career ideas.
- At Key Stage 4 learning more about their career options and how to take their next steps, this would include further and higher education courses related to the creative industries.
- Sixth form and further education students developing their understanding of post-18 transitions and future options, this would include higher education courses in the creative industries.

Careers Wales [digital tools](#) help learners explore potential career pathways, including pathways relating to creative industries and details relating to creative industries further and higher education courses.

Creative Wales is currently engaging with the Seren Programme leads to examine how engagement with industry can be offered to the brightest state school students to encourage them to consider further education within creative subjects.

A further £3m for Transition Funding has been allocated to further education institutions and local authority sixth forms for the 2022/23 academic year. The purpose of this funding is to enable institutions, in collaboration with schools, to provide guidance on post-16 pathways to learners in Y10 and Y11.

Our Apprenticeship support programme for businesses includes a Culture, Media and Design Framework Framework.

Due to the short-term “freelance” contract nature associated with the creative sector, apprenticeships starts have been limited. In 2019, a shared apprenticeship scheme was piloted in conjunction with Cardiff and Vale College and Sgil Cymru. The college employed the apprentices and Sgil Cymru brokered paid short term placements on film and TV projects in Wales. This CRIW shared apprenticeship scheme now recruits up to 30 apprentices in south and north Wales and is looking to extend the much valued CRIW brand to include opportunities for learners leaving FE/HE creative provision.

Work undertaken to facilitate engagement between schools, colleges, and higher education institutions

The Careers Wales offer includes:

- At Key Stage 4 learning more about their career options and how to take their next steps, this would include being aware of all options in schools, colleges, vocational, apprenticeships and employment
- Sixth form and further education students developing their understanding of post-18 transitions and future options, this would include higher education courses in creative industries.

Careers Wales [digital tools](#) help learners explore potential career pathways, including pathways relating to creative industries and details relating to courses linked to creative industries in schools, further and higher education.

Creative Wales is a member of the board of the Independent Venues Community, which is supporting Soundcheck Sessions, an initiative which offers young people (age 14+) the chance to attend a venue before doors open to the public, to watch the artist, playing that night, soundcheck and then participate in a Q&A with them along with some of the crew and venue team. Participants can come from local schools, colleges and youth groups, often giving them their first experience inside a grassroots music venue - www.youtube.com/watch?v=ebSRvqPuleU

The Commission for Tertiary Education and Research (CTER) will become operational from April 2024. Having all aspects of tertiary education and research under a single body will foster and support greater collaboration and cohesion and avoid sector fragmentation and unnecessary competition. CTER is empowered to ensure that our tertiary education and research sector is organised to meet the needs of learners, our education and training providers, employers and the Welsh economy and is essential in realising our strategic vision for the post compulsory education and training sector in Wales. We expect CTER to be well placed to work effectively and consistently across the tertiary education system, and with our education partners, to provide a co-ordinated approach to how provision at all levels post 16 is delivered across Wales.

We have identified a number of measures we can work on collectively to address the issues raised and deliver 16-19 curricula to support our wider education reforms, taking the opportunity to align with our Curriculum for Wales principles and purpose and our Programme for Government commitment to offer both pre- and post-16 learners a wide range of qualifications and qualification pathways of equal quality and value. This builds on the recent GCSE reform work to align with the new curriculum and will include expanding the range of made in Wales's vocational qualifications that meet the needs of our economy.

Information on measuring the outputs from and impact of the creative element of the new curriculum

The Welsh Government recently published its [Curriculum for Wales evaluation plan](#). This sets out how the Welsh Government will be evaluating the extent to which our reforms are achieving the aims we have set across the range of the curriculum, and engaging with learners, practitioners, and parents.

The Expressive Arts Area of Learning and Experience is one of six that has equal importance in the Curriculum for Wales, for all learners from age 3 to 16. Additionally, creativity is identified as an essential skill which is integral for learners to achieve the four purposes of the Curriculum for Wales and should be embedded across the curriculum.

One of the main initiatives to support creativity and the arts in education is the joint Welsh Government – Arts Council of Wales *Creative Learning through the Arts* programme. This well-established programme (commencing in 2015) is subject to a detailed independent evaluation process. A further report is due to be published in the Autumn, and reports to date have highlighted the programme's positive impact of the programme, particularly through its Lead Creative Schools strand, on supporting teachers and their teaching and on changing the attitude and culture of schools towards creativity and the arts. Most important of all is the impact on learners - the reports clearly show evidence from schools that consistently demonstrates increasing confidence among those learners engaged in the creative projects, learners being more excited about coming to school with attendance improving as a result, and better engagement being linked to better attainment.

Funding allocated to the Screen Academies Wales project, and information on the projects interactions with schools and colleges

The Screen Academies Network has been awarded £192,500 of funding via the Creative Skills Fund. This project is led by the University of South Wales in partnership with Bangor University and Screen Alliance Wales (SAW). SAW has an excellent track record of working extensively with both schools and colleges, providing outreach work, masterclasses and work experience placements. The new Academies will provide integrated training spaces to support students, communities and early career screen employees across Wales. Placing these new training facilities in the heart of industry and employing educational experts with direct contact to schools and colleges will connect industry development needs to the aspirations of future talent within these communities. A range of free to access, on-site activities such as tours, screening events, set visits and masterclasses will be complemented by an outreach programme to include school visits and community events broadening access at every available point.

The changes needed to careers advice services in Wales to ensure that the creative industries are considered viable as a career choice by learners

Careers Wales is a member of the Creative Wales Film & TV Skills Stakeholder Group which aims to encourage a partnership approach to developing the current and future screen sector workforce in Wales. Members include further, higher education and training

providers, broadcasters and industry. Both Screen Alliance Wales and Into Film work alongside Careers Wales to increase careers awareness within the sector.

Work undertaken to ensure that a range of vocational subjects is available to enable learners to work in the creative industries

The Curriculum for Wales has been designed as a national framework for learners aged 3 to 16 to support practitioners to develop their school curriculum, allowing them flexibility to meet the specific needs of their learners in their contexts and communities. This flexibility built into the curriculum from the age of 3 will enable different types of learning depending on the learner's person's preferences and interests, which should result in a curriculum that is more engaging for young people. Additionally, within the new curriculum there is increased emphasis on learner health and well-being, with that aspect receiving the same status as curriculum areas such as mathematics, or science and technology. This is a distinctive change to the 2008 National Curriculum and the existence of a more engaging and integrated curriculum offer provides the opportunity to support learners in different ways according to their interests.

For learners who are following the Curriculum for Wales, Qualifications Wales have recently consulted on their proposed Full 14-16 Qualifications Offer which includes some pre-vocational qualifications which are designed to give insight into a broad occupational area and an opportunity to gain hands-on experience. These include, Performing Arts and Creative and Media Production and Technology. For those learners who are following the 2008 National Curriculum, the Learning and Skills Wales (Measure) 2009 requires schools to offer learners at Key Stage 4 a minimum of 25 courses with at least 3 vocational qualifications in their local curriculum offer. Schools are encouraged to deliver courses in collaboration, ensuring that the number and range of qualifications on offer is kept as high as possible and allowing young people to choose from a broad and balanced curriculum.

Careers and Work-Related Experiences is a cross-cutting theme of the Curriculum for Wales for all learners aged 3 to 16. It is an important priority for schools to support learners to move confidently to employment, training or education after compulsory schooling with relevant knowledge, skills and experiences. Learners should gain experiences related to work and careers and develop knowledge of the breadth of opportunities available to them throughout their lives.

Schools' curricula should enable learners to gain experiences related to work and careers, developing knowledge of the breadth of opportunities available to them throughout their lives. This learning will help them make informed decisions about their career pathways. Experiences should aim to open learners' eyes to the possibilities that lie ahead and should provide high-quality advice about skills and career pathways, raising the aspirations of learners who may not consider that some opportunities are actually available to them.

Collaboration with individuals and employers will also provide learners with opportunities to learn about work, employment and the skills valued in the workplace. Learners can use the knowledge and skills gained from taking part in work-related experiences to develop successful enterprise activities. These can provide an authentic learning experience which helps them develop as enterprising, creative contributors, forming links with the world of work and raising their aspirations.

Gaming industry

Creative Wales has a strategic objective of growing the games industry in Wales. At the grassroots talent level, we support an annual programme 'Games Talent Wales' that provides upcoming or recent graduates with a stipend and wrap around support to develop a game concept. This is then taken to the annual EGX conference in October. Through this

programme we both stimulate new games development companies but also the creation of batches of IP.

Our regular development funding provides games studios with up to £25,000 for the development of a title, with the objective of securing further commercial funding. In the 2022 round, we supported 14 games with a total of £330,320.

In 2012, we launched production funding for games, enabling studios to apply for top up funding to produce a game, based on Welsh spend rather than job creation. We have recently completed our first project using this fund, which is currently awaiting final ministerial approval.

Each year we encourage Welsh games studios to develop international market awareness by taking a delegation to the Games Development Conference in San Francisco. This has grown year on year and in 2023 Creative Wales led a delegation of 18 companies alongside the Minister for Economy. A small delegation will also attend Gamescom in Cologne in August of this year.

We have also delivered a pilot incubator programme for games companies in conjunction with Indielab. This pan UK programme included spaces for six Welsh games developers and saw them receiving a series of sessions designed to improve their business capabilities and growth in the sector. The companies will now work towards an investor pitch in October this year.

Future planning

The fast-moving changes in Artificial Intelligence (AI) are of particular relevance to the Creative Industries and the Welsh Government acknowledges the benefits of data-driven technologies like AI and opportunities for first to market providers in this area. However, there is growing concern regarding the protection of intellectual property rights in all areas of creativity, from the digestion and re-use of published works by AI, to the automatic creation of images, voice and other content by automated tools. This includes the creation of content in journalism. There are also considerations regarding automation of tasks which may have been conducted by well-paid specialists, particularly in the technology driven areas such as post production, design, rendering etc. Questions are being raised as to how the UK copyright framework recognises the rights of IP holders whose works are used to advance/feed AI, and what practical licensing arrangements could be put in place to recognise rights holders. In addition, concerns are being raised regarding the potential for bias in the data used to deliver AI services, disruption and impact on the labour market, concerns around misinformation, and the growing interest in services such as ChatGPT.

It is difficult to estimate the exact impact of AI on jobs, although US research suggests that jobs traditionally held by women will be disproportionately affected with resulting job losses almost inevitable. The recent example of the Writers Guild of America strike in May this year is an example of the impact on employment, where concerns were raised over the deployment of AI to write movie and TV scripts.

Creative Wales continues to work with technology and policy colleagues and partners, including the Books Council of Wales, to help ensure we better understand these risks, and the steps needed to help alleviate them. We support the need for appropriate regulation alongside relevant standards, governance and assurance mechanisms – to ensure that AI technologies are used in responsible, ethical, inclusive, and safe ways.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Dawn Bowden', written in a cursive style.

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Deputy Minister for Arts, Sport and Tourism