



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

14 May 2024

Dear Delyth,

During the Welsh Government's evidence session on the **Inquiry into the challenges facing the creative industries workforce in Wales** on 25 May 2023, a commitment was made to share the Creative Wales Industry Survey 2023 report with the committee when available. I am writing to confirm, the full report is now available and can be found on the [Welsh Government website](#). The key findings from the survey are set out below.

Creative Wales Industry Survey 2023

The survey was completed by 639 respondents, with a quarter (26%) from both music and digital sectors, 27% from publishing and 21% from the screen industry. Over a third (37%) of respondents were self-employed or freelancers, and 41% were company owners or directors. This survey follows the [baseline survey](#) that was conducted in 2022, allowing comparisons to be drawn between years and helping to identify trends over time.

The findings highlight that Creative Wales plays a key role in supporting the sector, particularly around the recovery from the Covid-19 pandemic for businesses and freelancers.

The main findings include:

- The creative industries reported mixed experiences with regards to business performance, particularly in terms of changes in turnover – a quarter of business saw an increase compared to last financial year, just over a quarter (27%) saw a decrease and just under half (48%) reported no change.
- Changes in turnover were attributed to the ongoing impacts of Covid-19, which have been positive for some, whilst negative for others.
- Increasing profitability, improving marketing opportunities, and being more sustainable are the top three key priorities amongst the sectors. Growing the workforce is less of a priority compared to 2022.

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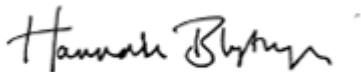
Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

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.

- Respondents are more confident than not about running their business profitably next year, although confidence is overall slightly lower compared to 2022. The digital sector showed the most confidence about running a profitable business and the music sector the least. Freelancers are less confident than employers, employees and those who are self-employed.
- 31% of freelancers faced difficulties in finding jobs for certain roles. Those in the screen and digital sectors reported more difficulties (52% and 38%, respectively) compared to freelancers in the Music sector (6%).
- 8% of businesses experienced challenges with staff retention. 16% of businesses encountered difficulties in filling specific roles, with the top three factors thought to be due to people moving away from Wales for employment, skills gaps, and competition from other companies.
- Skills and training remain an issue for both businesses and freelancers, with the most common areas of skills gaps reported to be sector-specific skills (35%), technological skills (32%) and Welsh language ability (26%).
- Similar to 2022, the industry would most like to see further financial support, increased opportunities for networking, and improved access and availability of business support and advice from Creative Wales.
- Welsh language ability is consistent with 2022 findings, with 18% of respondents being fluent in Welsh and 33% able to speak a few words. The Screen industry shows the highest fluency (26%), while the Digital sector shows the lowest ability levels.

The findings from the survey, which we aim to conduct on an annual basis, provide valuable information to Creative Wales that will inform decisions around how the sector can best be supported. The next round of data collection is scheduled for Autumn 2024.

Yours sincerely,



Hannah Blythyn AS/MS
Y Gweinidog Partneriaeth Gymdeithasol
Minister for Social Partnership