

Welsh Parliament

**Culture, Communications, Welsh Language, Sport,  
and International Relations Committee**

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# **A decade of cuts:** Impact of funding reductions for culture and sport

January 2025



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# **A decade of cuts:** Impact of funding reductions for culture and sport

January 2025



# About the Committee

The Committee was established on 23 June 2021. Its remit can be found at:  
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Current Committee membership:



**Committee Chair:  
Delyth Jewell MS**  
Plaid Cymru



**Mick Antoniw MS**  
Welsh Labour



**Alun Davies MS**  
Welsh Labour



**Heledd Fychan MS**  
Plaid Cymru



**Gareth Davies MS**  
Welsh Conservatives



**Lee Waters MS**  
Welsh Labour

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The following Members attended as substitutes during this inquiry:



**Rhun ap Iorwerth MS**  
Plaid Cymru



**Hannah Blythyn MS**  
Welsh Labour



**John Griffiths MS**  
Welsh Labour



**Siân Gwenllïan MS**  
Plaid Cymru

The following Members were also members of the Committee during this inquiry:



**Carolyn Thomas MS**  
Welsh Labour



**Laura Anne Jones MS**  
Welsh Conservatives

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## Chair's foreword

For too long, culture and sport have been treated as “nice to haves”, and these sectors have faced a decade and more of funding reductions, which has left them brittle and under-resourced. As a result, these sectors were hit particularly harshly by the cuts in the 2024-25 Welsh Government budget, which was exacerbated by the effects felt by inflation, rising costs and reduced participation post-COVID.

In Wales, funding of culture and sport is lower than in most European nations, which regrettably highlights the lack of strategy, vision and direction which has been given to these vital policy areas from the Welsh Government. This must be rectified, so that spending per head on these areas becomes comparable with those of similar nations. If this does not happen, there would be a serious risk of Wales being left behind in terms of culture and sporting achievements. It would, moreover, endanger aspects of our character as a nation, the levels of enjoyment that our citizens get from everyday life, and our standing on the world stage.

Culture and sport are vital threads in the fabric of what makes life worth living: they enrich the human experience, and not merely luxuries to be enjoyed during times of plenty. Yet the consistent and brutal under-funding of culture and sport means that “a Wales of vibrant culture” is the least-developed goal of the Well-being of Future Generations (Wales) Act 2015. It also undermines the proven capabilities of these policy areas to strengthen community cohesion, and to improve people's physical and mental wellbeing. It is cheaper to invest in preventative care than to treat ill-health, but there is, regrettably, limited joined-up thinking across government when it comes to the benefits of culture and sport. A ‘preventative’ category of spending in future budgets would help recognise and properly fund these sectors' true value, and we believe there could be merit in introducing such a change.

In the here and now, the effect of caustic cuts in these sectors has been profound. Organisations have been forced to make redundancies and prioritise their survival, whilst new work has often been set aside to the benefit of safer, “tried” projects that are more likely to cover costs. Community outreach work, for many organisations, has been another casualty, so imperilling participation in these sectors in less advantaged areas. Too many organisations and companies have faced crises, and are in desperate need of greater strategic direction from the Welsh Government.

What is more, the physical state of too many sport and cultural facilities in communities across the nation is worryingly poor. Many venues are under threat of closure, and rising costs threaten the viability of yet more others. The Welsh Government must work with local authorities to ensure that these community assets remain open and accessible to everyone, and that they meet their communities' needs.

But it is not only the here and now which is imperilled by these cuts: the likely effect of this lack of investment in facilities and in organisations will be a future where our young people are deprived of the chance to explore their talents and to represent Wales on the world stage. There is a real risk that participation in culture and sport will become yet more elitist, and that those people from diverse and lower-socio economic communities will feel the effect of these cuts the most harshly. It is a bleak future which faces these sectors in Wales, unless we see significant changes.

The recommendations in this report are intended as a wake-up call to the Welsh Government, and to provide a chance to change this worrying situation. We cannot allow culture and sport to become the privilege of the rich and the few – for we would all be at a loss were that to happen.

**Delyth Jewell MS**

Committee Chair



## Recommendations and Conclusions

- Recommendation 1.** The Welsh Government should increase funding for culture and sport until they are comparable (in terms of spending per head) with those of similar nations.....35
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- Recommendation 3.** The Welsh Government should revisit the fees involved in the National Exercise Referral Scheme. .... 36
- Recommendation 4.** The Welsh Government should develop a collaborative cross-department strategy to funding culture and sport, to ensure that funding decisions are joined up with wider government priorities, especially health and education. This strategy should recognise sport and culture as key vehicles to achieving the goals of the Well-being of Future Generations (Wales) Act 2015. ....37
- Recommendation 5.** The Welsh Government should empower culture and sport organisations by enabling them to spend additional funding provided by the Welsh Government according to their own governance processes, and not requiring undue additional authorisation from the Welsh Government. In doing so, it should consider how it can remove barriers such as business case requirements, and instead provide more funding as additional contributions to their grant-in-aid.....37
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# Introduction

## Background

1. The 2024-25 Welsh Government budget saw reductions in funding for all areas of culture and sport. The Arts Council's 2023 investment review also saw different allocations of revenue funding for arts organisations, including a 12 per cent cut for the Welsh National Opera.
2. Following widespread concerns about the impact of reduced funding on culture and sport, the Culture, Communications, Welsh Language, Sport and International Relations Committee (the Committee) decided to undertake an inquiry looking at the extent of the impact on both sectors.

## Terms of reference

3. At our meeting on 17 July 2024, we agreed the following terms of reference for the inquiry:
  - What impacts has reduced funding had on your organisation and sector so far?
  - What measures have you taken in light of it, such as changing what you do and how you do it?
  - To what extent will these impacts be irreversible (e.g. venues closing, or specialist skills being lost rather than a temporary restriction in activities)?
  - What interventions would you like to see from the Welsh Government, beyond increased funding?
  - To what extent do the impacts you describe fall differently on people with protected characteristics and people of a lower socioeconomic status?

## Evidence gathering

4. A public consultation was launched on 26 July 2024 and closed on 6 September 2024. We received 54 responses to the consultation.

**5.** We held nine oral evidence sessions with stakeholders, from 26 September 2024 to 24 October 2024, and we heard oral evidence from the Minister for Culture, Skills and Social Partnership Jack Sargeant MS (the Minister), on 13 November 2024.

**6.** Between 16 September 2024 and 25 September 2024, the Citizen Engagement Team facilitated seven focus groups and one interview with a total of 22 organisations. We published a summary note of these discussions.

**7.** As part of the inquiry, we visited the Wales Millennium Centre in Cardiff Bay on 2 October 2024. We also held a roundtable discussion with representatives from the publishing sector in Wales on 28 November 2024.

**8.** We are grateful to all those who contributed to our inquiry. Details of all evidence gathered can be found in the Annexes to this report.

# 1. Funding and budget constraints

## Welsh Government budget

**9.** The cuts to culture and sport in the 2024-25 budget were significant. Figures provided by the Welsh Government show a 17 per cent real terms reduction in revenue funding for culture and sport between 2014-15 and 2024-25, and a 195 per cent increase in capital funding.

**10.** During our engagement activities, organisations told us that the reduction in funding has, in real terms, been systematic over the last seven to ten years. One participant said:

*“We’ve received reduced funding on top of reduced funding for the last decade. So, it’s even more impactful and has a severe effect.”*

**11.** Between 2014-15 and 2024-25:

- Revenue and capital grant-in-aid funding for the Royal Commission on Ancient and Historical Monuments of Wales (the Commission) has declined by 34 per cent in real terms.
- Revenue and capital grant-in-aid funding for Sport Wales decreased by nine per cent in real terms.
- The Books Council of Wales’s total income has reduced by 20 per cent in real terms.
- Revenue and capital grant-in-aid for the National Library of Wales (the Library) reduced in real terms by about three per cent.
- Revenue funding for the Arts Council of Wales (ACW) reduced in real terms by about 29 per cent.
- Revenue and capital grant-in-aid for Amgueddfa Cymru reduced by about one per cent in real terms.

**12.** Provision of culture, sport and recreation services is discretionary for local authorities. Between 2013-14 and 2023-24, local authority revenue funding of libraries, culture, heritage, sport and recreation reduced by 28 per cent in real terms. The Welsh Local Government Association (WLGA) told us:

*“A reduction in the investment by Councils due to their reduced Revenue Support Grant (RSG) block grant and unprecedented pressures on health and social care budgets are compounding the problem for non-statutory services such as Leisure and Culture.”<sup>1</sup>*

**13.** The Welsh Sport Association (WSA) said that the Welsh Government’s direct spending on sport compares very unfavourably to other nations within the United Kingdom. We heard that:

*“Norway put £55 per head into sport, and they’re delivering outstanding, world-class athletes across all manner of sports. In Wales, we’re about £5 or £6 a head. Slovenia is £8 a head, Australia £10, New Zealand £14, Ireland £27.50. We’re very much short-changed here in Wales per head, and that needs to change.”<sup>2</sup>*

**14.** The Scottish Government has committed to investing at least £100 million more in arts and culture by 2028-29.<sup>3</sup>

**15.** The Minister noted that the Welsh Government has “had to make serious decisions and difficult decisions” but despite this has still invested in the sector.<sup>4</sup>

## **International comparison**

**16.** Some witnesses compared public sector spending on culture and sport between Wales and other countries. Senedd Research has analysed total government spending in Wales and other European nations. The full analysis and methodology is available at Annex 1.

**17.** Wales ranks third from bottom of the countries looked at in terms of recreational and sporting services funding per person and has a similar amount of funding as Poland and Lithuania. Wales ranks below the UK in terms of funding: Wales has £59.75 of funding per person for recreational and sporting services compared with the UK’s £66.18 of funding per person.

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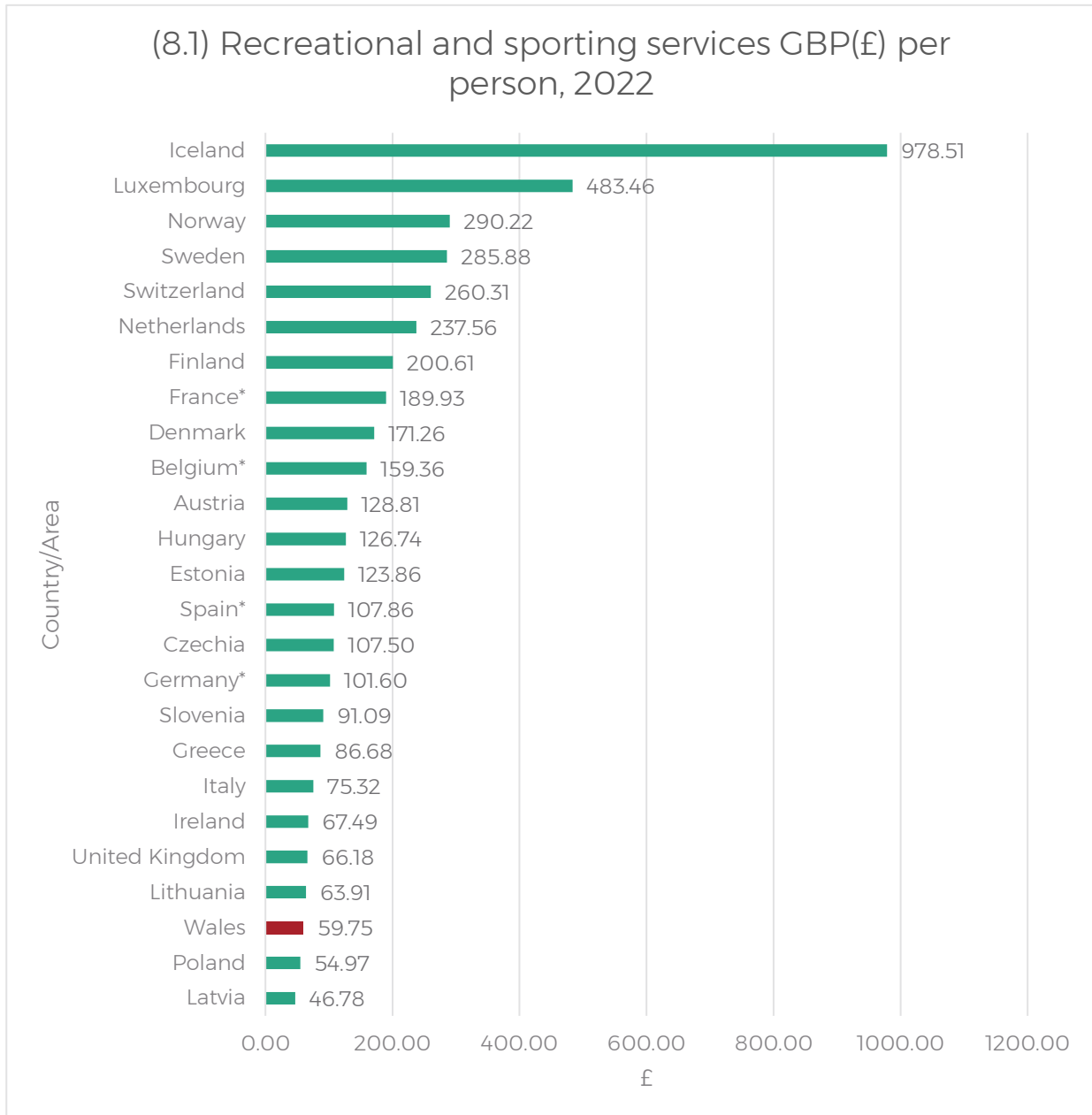
<sup>1</sup> [Written evidence, WLGA](#)

<sup>2</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 224

<sup>3</sup> [Scottish Government, Scottish Budget 2025-26](#)

<sup>4</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 14

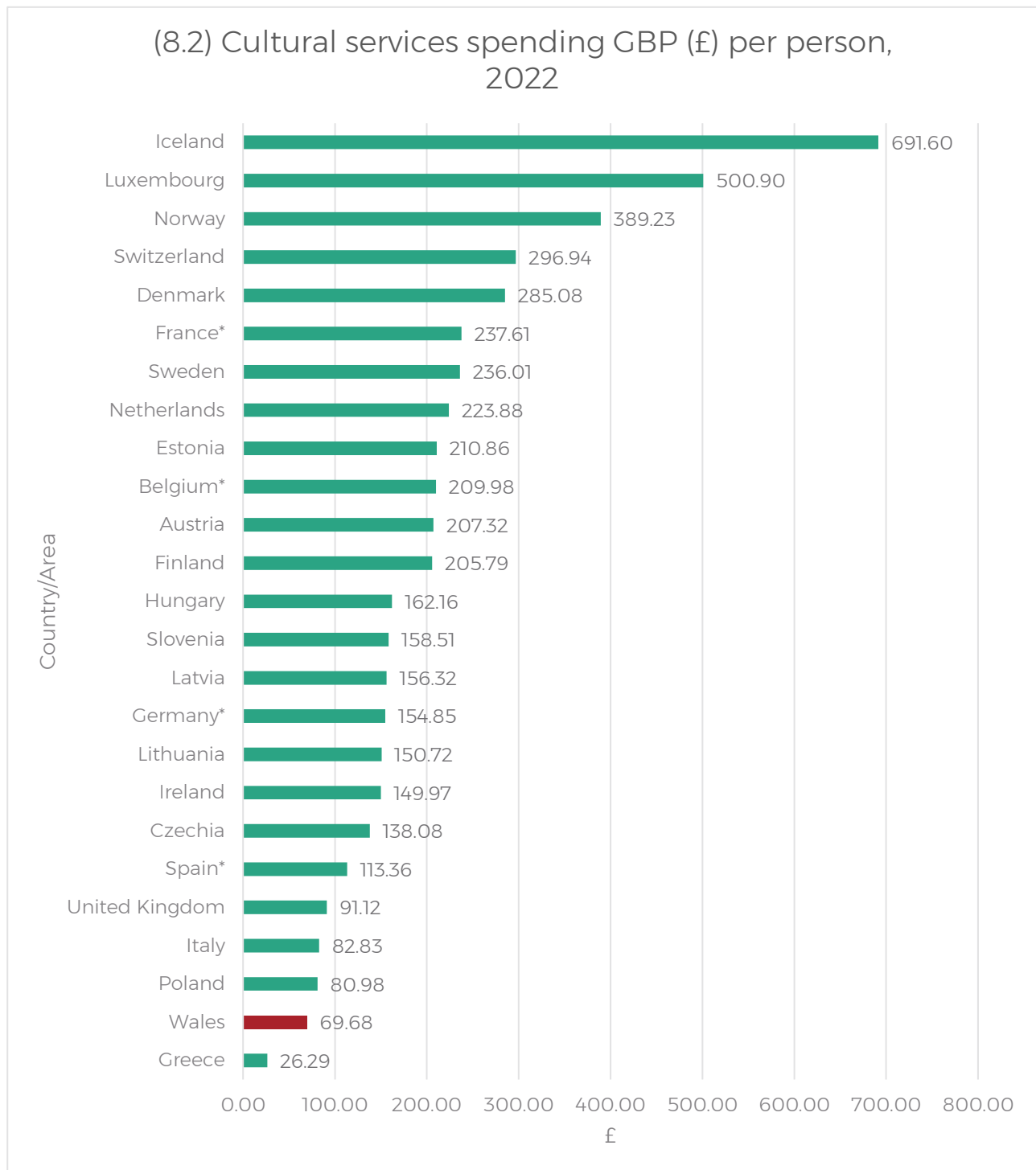
**Figure 1: European countries COFOG 8.1 Recreational and sporting services spending per person in GBP in 2022.**



**\*Provisional data**

**18.** Wales ranks second from bottom in terms of cultural services spending per person, ranking below all selected countries other than Greece. Wales has £69.68 spending per person for cultural services compared with the UK’s £91.12 spending per person.

**Figure 2: European countries COFOG 8.2 Cultural services spending per person in GBP in 2022**



**\*Provisional data**

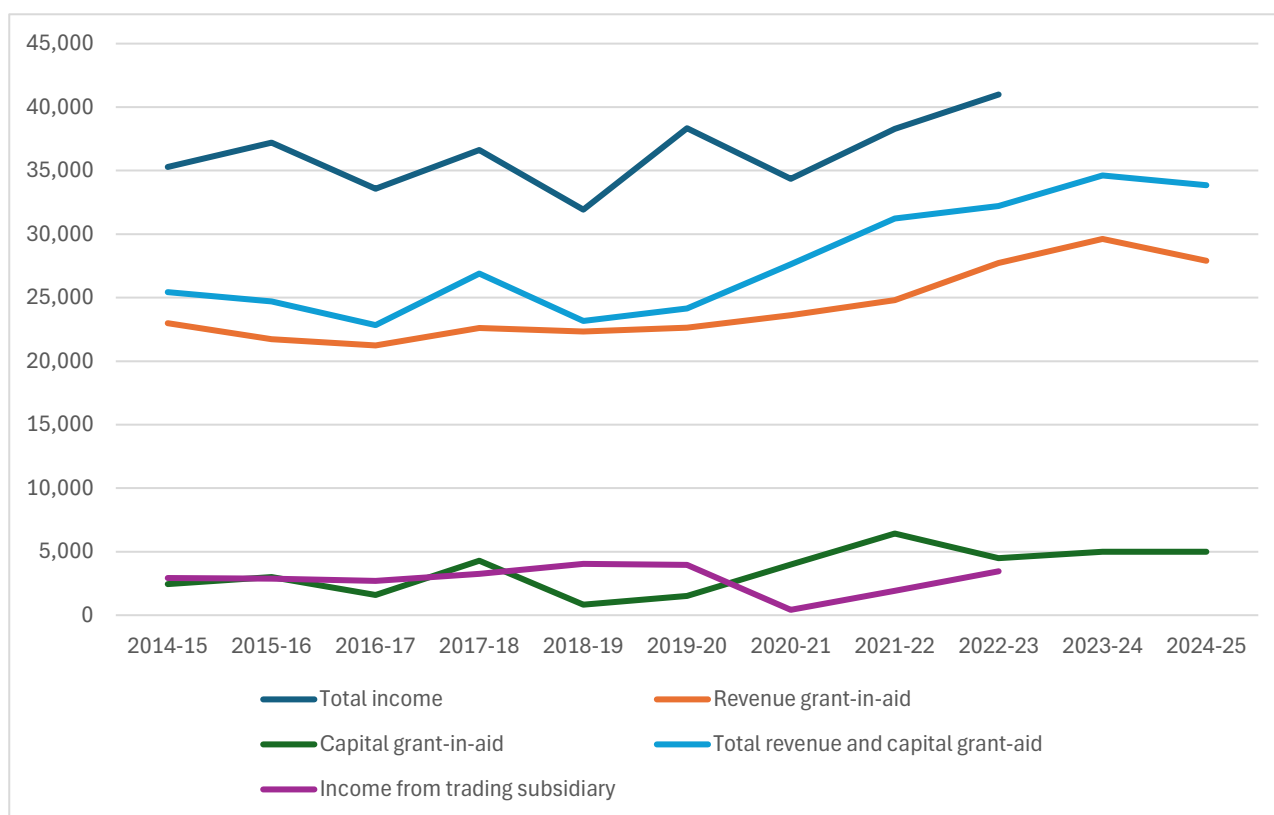


## Welsh Government sponsored bodies

19. The bulk of Welsh Government activity in culture and sport is discharged by arms-length bodies funded by the Welsh Government. These are: Amgueddfa Cymru, National Library of Wales, Arts Council for Wales, Books Council of Wales, Royal Commission on Ancient and Historical Monument of Wales, and Sport Wales.

### Amgueddfa Cymru

Figure 3: Funding of Amgueddfa Cymru 2014-15 to present



**NB. Grant-in-aid figures for 2023-24 and 2024-25 are taken from Welsh Government budgets, and so are not directly comparable to previous years.**

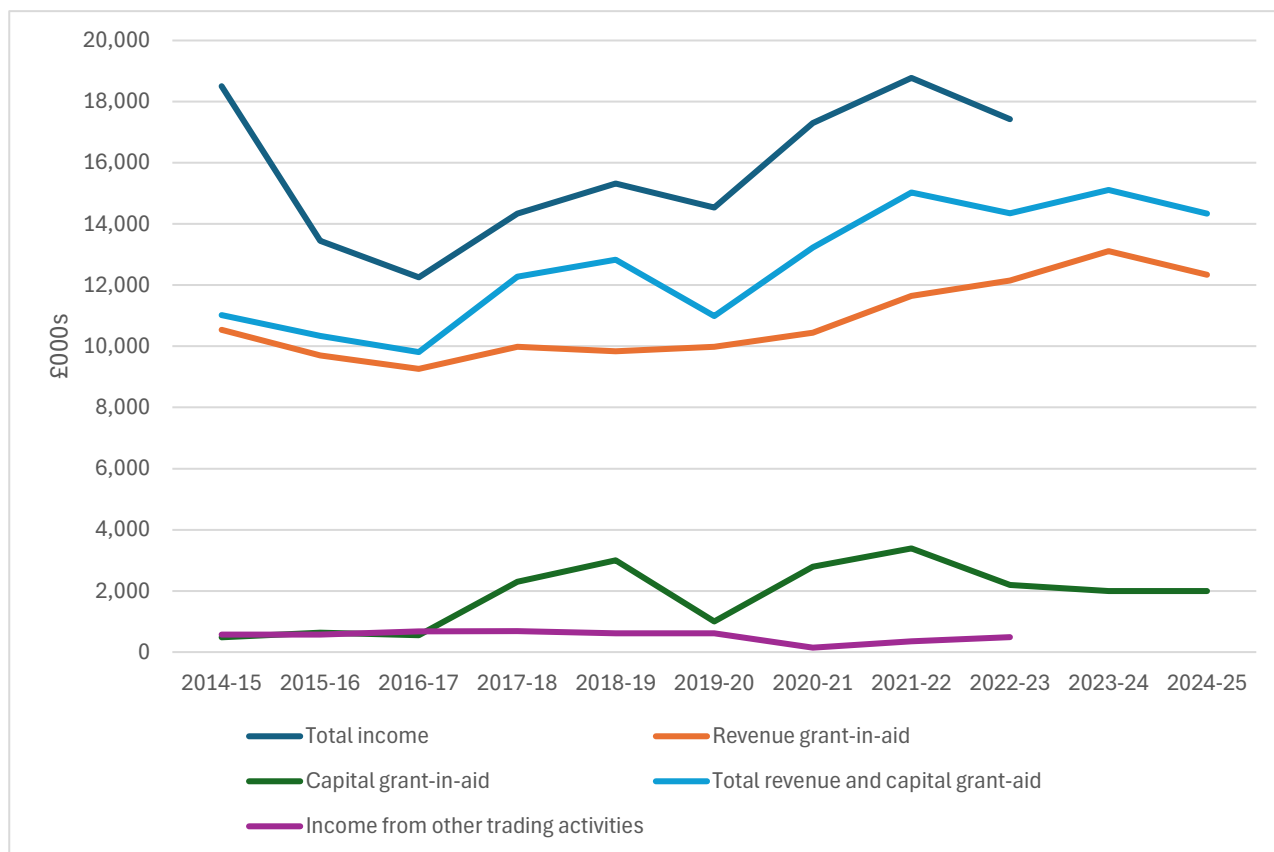
**NB. Grant-in-aid figures exclude specimen grant-in-aid and other government funding.**

20. Revenue funding for Amgueddfa Cymru decreased from £29.6 million in the 2023-24 final budget to £27.9 million in the 2024-25 final budget. This is a decrease of six per cent. Over the same period capital funding remained at £5 million. In 2014-15, revenue funding for the Amgueddfa was £23 million. This

means its revenue funding has reduced in real terms over a decade by nine per cent<sup>5</sup>.

## National Library of Wales

**Figure 4: Funding of National Library 2014-15 to present**



**NB: Grant-in-aid figures for 2023-24 and 2024-25 are taken from Welsh Government budgets, and so are not directly comparable to previous years' figures, which are taken from the Library's accounts.**

**NB. Grant-in-aid figures exclude other government funding for specific purposes.**

**NB. 2024-25 revenue-grant-in-aid figures excludes £725,000 revenue funding announced in September 2024, as it is unclear what sort of funding this is.**

**Sources: 2014-15 to 2022-23: National Library for Wales Annual Accounts, 2023-24: Welsh Government Second Supplementary Budget, 2024-25: Welsh Government Final Budget.**

**21.** Revenue funding for the National Library decreased from £13.1 million in the 2023-24 final budget to £12.3 million in the final budget 2024-25; a decrease of six per cent. Over the same period capital funding remained at £2 million. In 2014-15

<sup>5</sup> Calculated on 22 May 2024 using the [Bank of England inflation calculator](#).

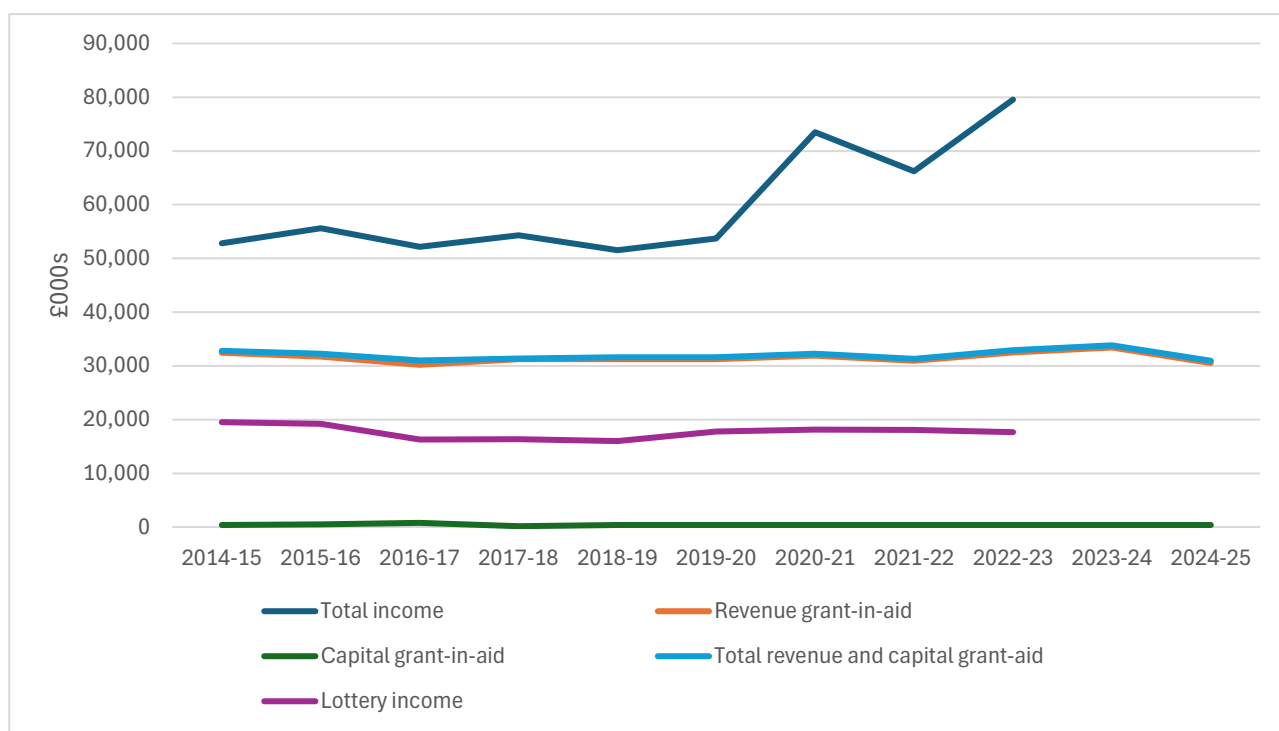
revenue funding for the Library was £10.5 million, meaning that its revenue funding reduced in real-terms over a decade by about 12 per cent.

**22.** In July 2024 the Welsh Government announced an additional £3.2 million of capital funding for the National Library and Amgueddfa Cymru, but did not specify how much each organisation would receive.

**23.** In September 2024 the Welsh Government announced an extra £5 million of revenue funding for culture and sport in 2024-25, including £725,000 for the National Library.

## Arts Council of Wales

**Figure 5: Funding of Arts Council of Wales 2014-15 to present**



**NB: Grant-in-aid figures for 2023-24 and 2024-25 are taken from Welsh Government budgets, and so are not directly comparable to previous years' figures, which are taken from the Arts Council's Annual Report and Financial Statements.**

**NB. Grant-in-aid figures exclude other government funding for specific purposes.**

**NB. Total income in 2020-21 and 2021-22 includes COVID funding (£18.3m in 2020-21 and £12.7m in 2021-22). Total income in 2022-23 includes £25.9m of restricted funding from**

**Welsh Government for other specific activities. The largest element of this is the £23.5m capital award for Theatr Clwyd which has been re-granted to Flintshire County Council.**

**NB. 2024-25 revenue-grant-in-aid figures excludes £1.5 million revenue funding announced in September 2024.**

**Sources: 2014-15 to 2022-23: Arts Council for Wales Annual Report and Financial Statements, 2023-24: Welsh Government Second Supplementary Budget, 2024-25: Welsh Government Final Budget.**

**24.** Revenue funding for ACW decreased from £33.4 million in the 2023-24 final budget to £30.5 million in the 2024-25 final budget; a decrease of nine per cent. In 2014-15 revenue funding for ACW was £32.42 million. This means its revenue funding reduced in real terms over a decade by about 29 per cent. Capital funding over the same period remained the same at £400,000.

**25.** Following the publication of the 2024-25 Draft Budget, ACW issued a statement. It said:

*“Our current budget is lower than it was in 2010 which means that we have already lost a third of our real-terms funding since then. This significant new cut of 10.5% will make it even more challenging to ensure that high quality arts activity is available across Wales for all our communities. The invaluable work that we support in Arts and Health, Education, the Welsh language and our work in widening engagement will be affected - all of which are Government priorities. In fact, this provisional budget of £30.429m for 2024/25 is the lowest since 2007/08.”<sup>6</sup>*

**26.** ACW received an additional £1.5 million of revenue funding in September 2024. The Welsh Government said the funding for ACW “will be used to provide support to arts organisations, focusing on organisational resilience”.<sup>7</sup>

**27.** On 3 December 2024, the Minister announced a further £1 million of additional revenue funding to support organisational resilience and protect jobs in the arts sector, through ACW.<sup>8</sup>

**28.** Literature Wales, which receives annual revenue funding from ACW, said:

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<sup>6</sup> [Arts Council of Wales. The Arts Council of Wales response to the Welsh Budget. 20 December 2023](#)

<sup>7</sup> [Welsh Government. Written Statement: Additional funding for the culture and sport Arm's Length Bodies and Cadw. 5 September 2024.](#)

<sup>8</sup> [Welsh Government. Written Statement: The Arts Council of Wales' Job Protection and Organisation Resilience Fund. 3 December 2024](#)

*“The 10.5% cut to ACW has led to a reduction in staffing levels and has impacted our working relationship. [...] We fear that this will lead to less understanding of the impact of our work within ACW, which could in turn lead to further reduced funding”.*<sup>9</sup>

**29.** On 27 September 2023, ACW published the outcome of its Investment Review, which determined which organisations would receive multi-year revenue funding. 81 organisations across Wales received conditional offers of funding for the 2024/25 financial year, a total of £29.6 million.<sup>10</sup>

**30.** One of the major decisions taken by ACW during the Investment Review was to cut funding for National Theatre Wales (NTW) by 100 per cent. The Investment Review document explained:

*“This does not reflect any doubts we have about the potential or need for English language theatre in Wales. Indeed, this Investment Review will see an increase in companies producing theatre in English. However, we are committing to a review of English language theatre in Wales and the interventions and support that might be needed in the future.”*<sup>11</sup>

**31.** On 18 December 2024 it was announced that NTW has come to an end following the loss of all its ACW funding.<sup>12</sup>

**32.** The 2023 Investment Review also included a reduction in funding for the Welsh National Opera (WNO) of 12 per cent, as well as ceasing to fund Mid Wales Opera. WNO is also funded by Arts Council England, in recognition of the cross-border work it does. Arts Council England cut its funding by 35 per cent.

**33.** In 2022, WNO received £6.2 million from ACE and £4.6 million from ACW.<sup>13</sup> Its annual funding from ACE has been reduced to £4 million,<sup>14</sup> the same as its funding from ACW.

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<sup>9</sup> [Written evidence, IFRCs 31 Literature Wales](#)

<sup>10</sup> [Arts Council of Wales, Investment Review 2023: Arts Council of Wales announces new funding for 81 Wales-based organisations, 29 September 2023](#)

<sup>11</sup> [Arts Council of Wales, Investment Review 2023 Report and Decisions](#)

<sup>12</sup> [BBC Wales, Final curtain goes down on National Theatre Wales, 18 December 2024](#)

<sup>13</sup> [WNO, Corporate documents](#)

<sup>14</sup> [Arts Council England, 2023-26 Investment Programme: Data](#)

**34.** The Musicians' Union wrote to us saying that:

*"These reductions are leading to such significant and permanent changes at a national company that is structurally important for arts and culture in Wales there is a strong case for Welsh Government to step in with additional support."*<sup>15</sup>

**35.** The then Cabinet Secretary for Culture and Social Justice acknowledged in a letter to us in 25 June 2024 that the ACW will "inevitably have to undertake some difficult decisions when it comes to funding". However she said:

*"Under the arm's-length funding principle, ACW's Investment Review is an issue for ACW alone and the Welsh Government does not get involved in any of its funding decisions."*<sup>16</sup>

**36.** She also noted that opera is receiving 71 per cent of the total spend on the music sector for 2024-25.<sup>17</sup> ACW confirmed that WNO is the highest supported organisation that they fund.<sup>18</sup>

**37.** WNO called on the Welsh Government to take the company on board and give it every chance.<sup>19</sup>

**38.** The Minister told us that he is aware that WNO applied for funding from the additional £1.5 million that ACW received in September 2024. He said:

*"... where I stand on the WNO is that it's of national significance, it's important to have the Welsh National Opera. I want to see opera thriving here. There is that process where they can apply. I encouraged them to do so. They have done, and we need to await the outcome of that process and then see what the result is."*<sup>20</sup>

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<sup>15</sup> [Letter from the Musicians' Union to the Chair of the Culture, Communications, Welsh Language, Sport, and International Relations Committee, 30 May 2024](#)

<sup>16</sup> [Letter from Cabinet Secretary for Culture and Social Justice to Chair of Culture, Communications, Welsh Language, Sport, and International Relations Committee, 25 June 2024](#)

<sup>17</sup> [Letter from Cabinet Secretary for Culture and Social Justice to Chair of Culture, Communications, Welsh Language, Sport, and International Relations Committee, 25 June 2024](#)

<sup>18</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 211

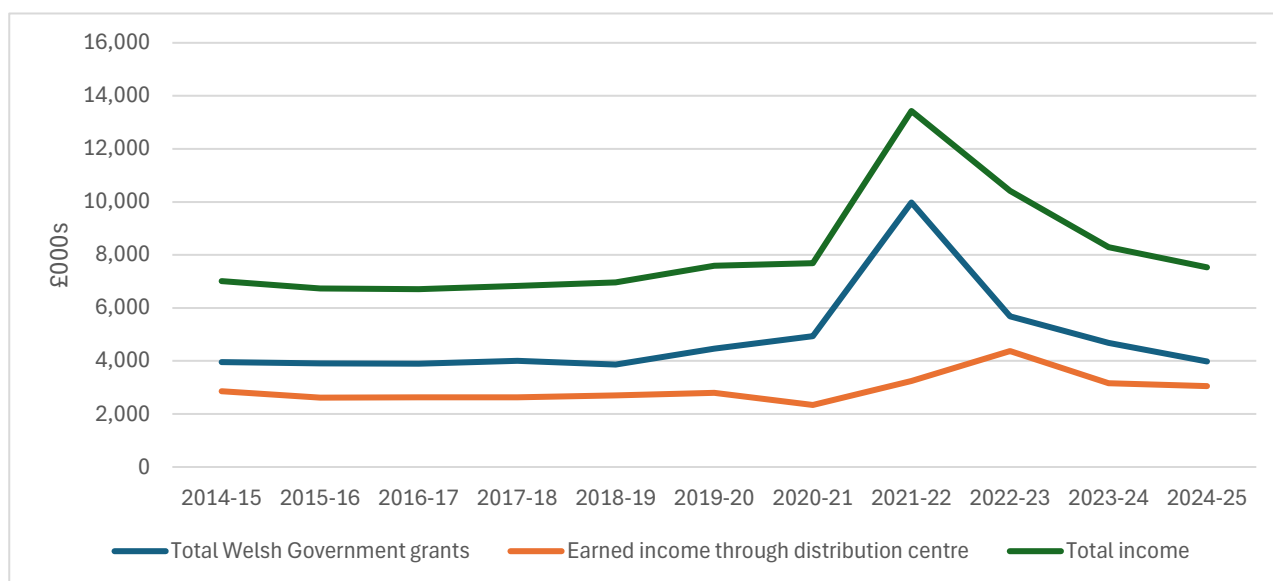
<sup>19</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 361

<sup>20</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 88

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## Books Council of Wales

**Figure 6: Books Council of Wales funding 2014-15 to present**



**Source: Figures provided by Books Council of Wales and taken from Annual Accounts.**

**NB. 2024-25 figures are budgeted rather than actual figures.**

**In 2024-25 the budgeted total Welsh Government grants for the Books Council is £3.98 million, a reduction of 15% from the actual figure in 2023-24 of £4.68 million.**

**39.** In the 2024-25 budget the Welsh Government allocated £3.98 million for the Books Council, a reduction of 15 per cent from the actual figure in 2023-24 of £4.68 million. Between 2014-15 and 2024-25 the Books Council’s total income has reduced by 20 per cent in real terms.

**40.** The Books Council told us that the core impact of the funding reductions is fewer books and magazines.<sup>21</sup> They explained that the only way they can operate with the Welsh Government’s grant is by producing less. The number of English books published every year is now 48, compared to 56 a decade ago; and in the same period the number of Welsh books has reduced from 185 to 122. The Books Council said that this feels “counterintuitive” given the Welsh Government’s aspiration of having a million Welsh speakers and that books help to develop language skills. In addition to what they described as this “core impact”, the Books Council said that they have also lost the budget lines for training, supporting games and grants for Welsh bookshops.<sup>22</sup>

<sup>21</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 173

<sup>22</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraphs 173-175

**41.** We have been engaged in correspondence about the Books Council’s magazine funding model with the Books Council, the publishing sector and the Welsh Government. The correspondence has centred on concerns about the Books Council’s distribution of funding for English-language magazines, primarily raised by Emily Trahair, the former editor of cultural and political magazine, Planet, which did not have its funding renewed. New Welsh Review did not have its funding renewed either.

**42.** According to Emily Trahair, the working conditions determined by funding conditions had become unbearable for a number of publications. In an editorial marking the final issue of Planet in July 2024, she said:

*“many of us could no longer balance our budgets at all, despite strenuously engaging in myriad additional income-raising activities, and having no shortage of expertise on the most appropriate alternative forms of revenue and support.”<sup>23</sup>*

**43.** In a letter to us in September 2024, the Books Council agreed that:

*“a decade of standstill funding followed by this year’s budget cut has created an almost impossible environment for small independent publishers to exist, let alone thrive.”<sup>24</sup>*

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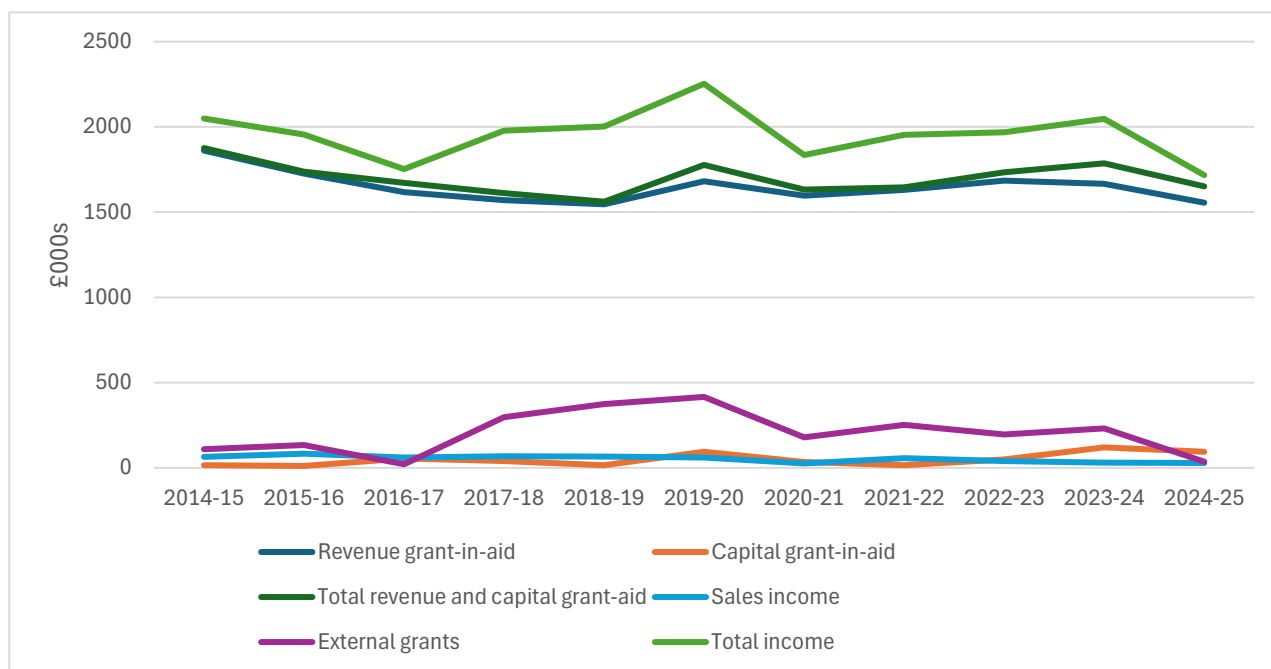
<sup>23</sup> Planet, Hwyl Fawr, Planet 253, July 2024

<sup>24</sup> Letter from Books Council of Wales to the Chair of Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 September 2024



## Royal Commission on Ancient and Historical Monuments

**Figure 7: Funding of Royal Commission on the Ancient and Historical Monuments 2014-15 to present**



**Source:** figures provided by RCAHMW

**44.** Revenue funding for the Commission decreased from £1.9 million in the 2023-24 budget to £1.8 million in 2024-25; a decrease of five per cent. Over the same period capital funding remained at £50,000. Since 2014, Welsh Government revenue and capital grant-in-aid funding for the Commission has declined by 34 per cent in real terms

**45.** When the Welsh Government announced in September 2024 an extra £5 million of revenue funding for culture and sport in 2024-25, £90,000 was given to the Commission.

**46.** The Commission told us:

*“The last decade has seen a slow attrition of our budgets, starting with the substantial in-year cut of in 2014-15, which led to the loss of 14 posts, and continuing with flat budgets every year until this year’s deeper cut of 10.5 per cent.”<sup>25</sup>*

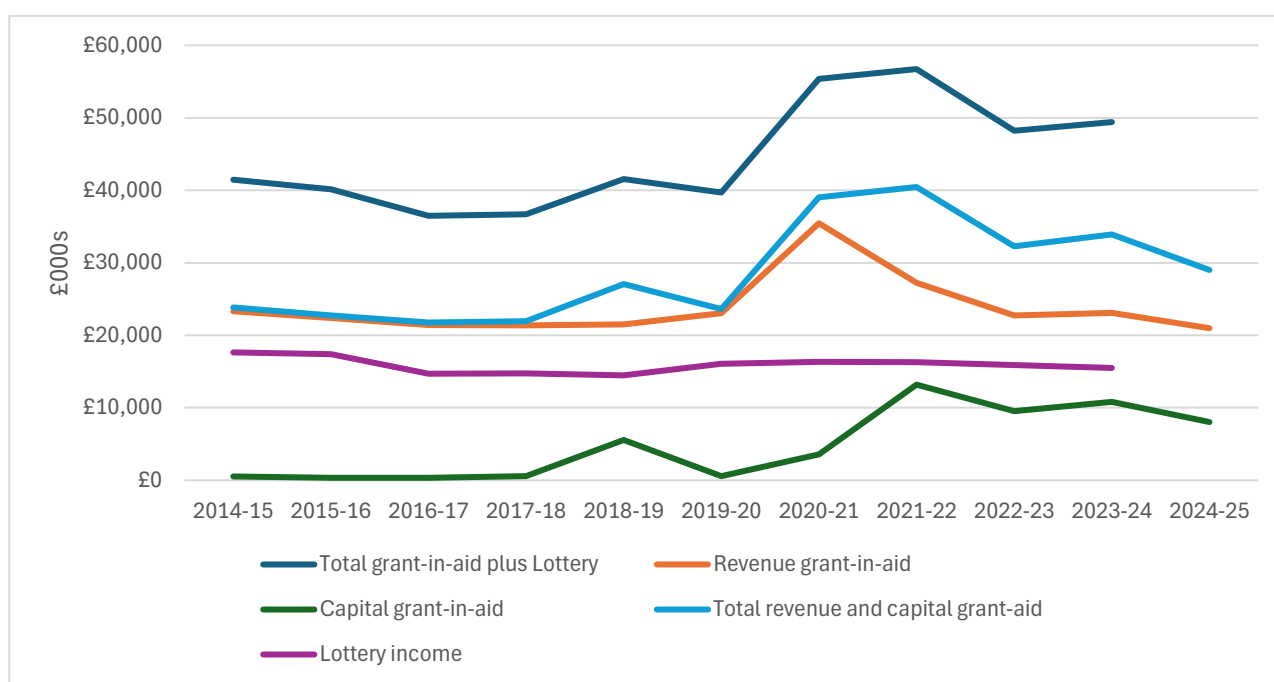
<sup>25</sup> [Written evidence, IFRCS 40 RCAHMW](#)

**47.** To make up for the loss of core funding, the Commission said that they have worked hard to secure external funding, without which they would have been unable to fulfil their government remit. They said that:

*“our funding from Welsh Government pays for the salaries of our staff and the things that we have to do, like computing, cyber security—that comes at a big cost, £110,000 a year just for our computers, before we even sit at our desks. So, we’ve had to work very, very hard to win external funding for the KPIs.”<sup>26</sup>*

## Sport Wales

**Figure 8: Sport Wales Welsh Government grant-in-aid and Lottery funding 2014-15 to present**



**NB. 2019-19 GIA includes £1.5m for Healthy and Active Fund and £200,000 for Emergency Relief Fund. 2020-21 includes £14.2m Sport Resilience (SRF) Fund related revenue. 2021-22 includes £4m Sport Resilience Fund and /£1m Winter of Wellbeing. 2021-22 includes £500,000 cost-of-living support for the sector. 2022-23 includes £500,000 cost-of-living support for the sector.**

**48.** In comparison with the 2023-2024 final budget, revenue funding for Sport Wales decreased from £23.8 million to £21.8 million in the 2024-25 final budget (a decrease of 8.4 per cent in cash terms). Over the same period, capital funding

<sup>26</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 195

remained at £6.8 million. Since 2014-15 to 2024-25, Welsh Government revenue and capital grant-in-aid funding for Sport Wales decreased by nine per cent in real terms.

**49.** The Welsh Government’s evidence paper for the 2024-25 Draft Budget scrutiny session described a recent academic report that showed that:

*“For every £1 spent on sport and active recreation in Wales, £4.44 worth of social benefits are generated. This demonstrates the incredible annual contribution sport makes to health, and other areas, particularly the potential sport has to be the most effective preventative health tool at our disposal. Sport can be the nation’s most effective preventative health tool but greater cross-sector prioritisation is needed to create the long-term sustainable shifts in participation.”<sup>27</sup>*

**50.** Sport Wales described the £2.5 million cut to its budget in 2024/25 as “a false economy”, estimating that the reduction led to a loss of £11.1 million of social return on investment.<sup>28</sup>

**51.** We heard that Sport Wales has tried to minimise as much as possible the implications of the funding reductions for their partners by “passing on only 3.5 per cent” of the cut.<sup>29</sup>

**52.** Sport Wales was given £1 million in September 2024 as part of the Welsh Government’s additional revenue funding for culture and sport.

**53.** On 11 November 2024, Sport Wales announced funding towards 37 sporty projects as a result of £8 million worth of capital funding for 2024-25 from the Welsh Government. Sport Wales said that the funding will:

*“widen access to sports and physical activity among communities, create more artificial pitches in places that need them most, and also support our most talented athletes to achieve their dreams.”<sup>30</sup>*

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<sup>27</sup> [Welsh Government, Memorandum on the Draft Budget proposals for 2024-25](#)

<sup>28</sup> [Written evidence, IFRCs 41, Sport Wales](#)

<sup>29</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 10

<sup>30</sup> [Sport Wales, The 37 sporty projects to share £3.5m of Welsh Government funding, 11 November 2024](#)

**54.** According to LTA & Tennis Wales, the Sport Wales capital investment scheme coming to an end would be a significant risk to the sustainability of sport facilities in the future, risking the growth in participation.<sup>31</sup>

## **Draft Budget 2025-26**

**55.** In the Welsh Government's 2025-26 Draft Budget published on 10 December 2024 most, but not all, of the cuts to culture and sport spending implemented in the 2024-25 budget have been reversed.<sup>32</sup> The Draft Budget will be scrutinised by Members of the Senedd before a final vote in March 2025.

**56.** The total revenue allocation for the sector is £129.5 million, an increase of seven per cent on the 2024-25 final budget, but a decrease of 0.4 per cent on the 2023-24 final budget.

**57.** The total capital allocation for the sector is £73.6 million, an increase of 34 per cent on the 2024-25 final budget, and an increase of 42 per cent on the 2023-24 final budget.

**58.** Revenue funding has increased compared with their 2023-24 allocations for Amgueddfa Cymru, the Library, Cadw and the Commission. It has declined for ACW (by 5 per cent) and Sport Wales (by 5 per cent). Funding for the Books Council is allocated by Creative Wales, the Welsh Government's creative industries division, the revenue allocation for which is eight per cent lower in the 2025-26 Draft Budget compared with 2023-24.

## **Preventative spend**

**59.** The Well-being of Future Generations (Wales) Act 2015 is a clear expression of the Welsh Government's intent to plan services for the longer-term.

**60.** The Future Generations Commissioner's response to the Finance Committee's 2024-25 draft budget consultation explained:

*“Cultural well-being has equal footing with environmental, social and economic well-being in the Well-being of Future Generations Act, recognising the enormous role that it plays in supporting both people and planet [...] All too often, cultural*

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<sup>31</sup> [Written evidence, IFRCs 43, LTA & Tennis Wales](#)

<sup>32</sup> “Culture and sport” is taken to be the sum of the following Welsh Government Budget Expenditure Lines: National Museum Wales, National Library Wales, Arts Council Wales, Sport Wales, Cadw, RCAHMW, Creative Wales, Support for local culture and sport and broadcasting and media.

*services such as leisure centres and arts facilities are the hardest hit in times of budget pressures across all levels of government. This is despite the fact that these are some of the very things that keep us well in times of need and cost of living pressures.”<sup>33</sup>*

**61.** A participant in our engagement activities described the Act as an “amazing piece of ground-breaking legislation” and called for it to be used “more as a tool rather than it just sitting there.” Similarly, Community Leisure UK said that it needs more investment.<sup>34</sup> NTW believe that the “amazing goals” set out in the Act are at risk without effective investment in the arts.<sup>35</sup>

**62.** According to Wales Council for Voluntary Action (WCVA), the 2024-25 budget:

*“left voluntary sector leaders alarmed by the shift of policy direction away from prevention, which we find incompatible with the goals of the Wellbeing of Future Generations Act.”<sup>36</sup>*

**63.** The Local Government and Housing Committee, in its 2023 report into Local Authority Leisure and Library Services, recommended that the Welsh Government should review the effectiveness of the Well-being of Future Generations (Wales) Act 2015 in ensuring the provision of public leisure services in Wales.<sup>37</sup> The Welsh Government rejected the recommendation, stating that the Act is not designed to ensure the provision of public leisure services in Wales..<sup>38</sup>

**64.** Several witnesses called on the Welsh Government to play a more prominent role in promoting the value of culture and sport. For example, Creu Cymru said that it could raise public awareness and integrate cultural objectives into broader social and economic policies.<sup>39</sup> Similarly, ACW called for increased collaboration

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<sup>33</sup> [Response from the Future Generations Commissioner to the Finance Committee consultation on the Welsh Government Draft Budget 2024-25](#)

<sup>34</sup> [Written evidence, IFRCs 32 Community Leisure UK](#)

<sup>35</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 40

<sup>36</sup> [Written evidence, IFRCs 28 WCVA \(Wales Council for Voluntary Action\)](#)

<sup>37</sup> [Local Government and Housing Committee, Local Authority Library and Leisure Services, July 2023](#)

<sup>38</sup> [Welsh Government, Response to the Local Government and Housing Committee report on local authority library and leisure services](#)

<sup>39</sup> [Written evidence, IFRCs 25 Creu Cymru](#)

across Welsh Government departments as to how arts and culture can contribute to other areas such as the economy, health and education.<sup>40</sup>

**65.** Witnesses also suggested that the preventative potential of spend on culture and sport is being under-utilised. Community Leisure UK noted that “funding through prevention rather than cure is cheaper and more cost effective”.<sup>41</sup>

**66.** WLGA called for “greater national recognition of the preventative role the sector plays in terms of health and social care, and its contribution to the economy.” They believe that encouraging early intervention with culture and sport is a “cheaper and better option than waiting until more expensive, specialist, intervention is needed.”<sup>42</sup> In oral evidence, WLGA said that the current funding settlement does not recognise sport and cultural provision as a preventative service, adding that “the health service has been funded to a greater degree than local government in recent years.”<sup>43</sup>

**67.** Sport Wales told us that they would like to see:

*“health prevention budgets consider sport and physical activity as a method for delivering their outcomes and aligning budgets where others are better placed to deliver activity.”<sup>44</sup>*

**68.** There were similar calls for a more holistic approach to working with other sectors that rely on culture and sports from participants in our engagement activities:

*“There’s something fundamentally wrong that people want to use the arts, they know the value of it, but they’re not prepared to put the actual price on the value of it.”*

*“Movement, physical activity and sports are a significant solution to a lot of wider social issues and challenges.”*

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<sup>40</sup> [Written evidence, IFRCs 35 Arts Council of Wales](#)

<sup>41</sup> [Written evidence, IFRCs 32 Community Leisure UK](#)

<sup>42</sup> [Written evidence, WLGA](#)

<sup>43</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 29

<sup>44</sup> [Written evidence, IFRCs 41 Sport Wales](#)

**69.** NTW called for the arts to be viewed “far longer term” and “how that can release and reduce pressure on other services moving forward”. They said of the arts:

*“it’s such a vital part of the nation’s cultural identity, it brings communities together, it can support the health service by providing vital interventions, it allows our young people to become more adaptable, capable learners.”<sup>45</sup>*

**70.** According to WSA, for a relatively small additional investment, sport and leisure would be able to deliver far more against Wales’ wider objectives.<sup>46</sup> Conwy County Borough Council also claimed that the costs of such interventions are “relatively small”.<sup>47</sup>

**71.** With regards to investments in specific preventative intervention, Cyngor Gwynedd called for the establishment of an additional Referral to Practice Programme for non-chronic conditions, adding that it can reduce the demand on the health sector while making leisure facilities more self-sustainable. They also called for a reasonable process within the terms and conditions of the National Exercise Referral Scheme to review user fees as a contribution towards delivery costs.<sup>48</sup>

**72.** According to Conwy Council the grant for the National Exercise Referral Scheme has remained the same, but their costs have gone up:

*“So, we are able to deal with fewer people now than we were when the scheme was first put in place, despite the fact that, really, there’s so much evidence about how successful it’s been, and obviously that preventative work is very likely to be much cheaper than the further medicalisation further down the road.”<sup>49</sup>*

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<sup>45</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 37

<sup>46</sup> [Written evidence, IFRCs.46 Welsh Sports Association](#)

<sup>47</sup> [Written evidence, IFRCs.26 Conwy County Borough Council](#)

<sup>48</sup> [Written evidence, IFRCs.20 Cyngor Gwynedd](#)

<sup>49</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 111

**73.** The Books Council said that it is “often poorly understood the immediate and direct contribution” the publishing industry can make to the health and education sectors.<sup>50</sup>

**74.** Swim Wales told us about a pre COVID joint fund of £5 million between sport and health, adding that “it was a real success” but that there has not been anything since.<sup>51</sup>

**75.** In its 2024-25 Draft Budget report, the Health and Social Care Committee recommended:

*“The Welsh Government should consider introducing, across all its departments, a ‘preventative’ category of spend in future budgets, moving towards a longer term budgeting view in order to help build and protect population health.”<sup>52</sup>*

**76.** The Welsh Government’s accepted this recommendation in principle and said:

*“In line with our longer term aspirations, we remain committed to improving how we embed and demonstrate prevention and will consider what further changes we make as part of our review of the Strategic Integrated Impact Assessment and the wider work on the Budget Improvement Plan. Through the Budget Improvement Plan we will outline, at the appropriate time, updates on our approach to embedding prevention within our budgeting process.*

*As we have outlined, this is a complex and longer term area of work. Prevention is not just about the quantum of funding it is also about the way funding is spent. Defining the outcomes of spending from a prevention perspective is complex particularly where there are multiple beneficiaries of spending and therefore potentially multiple different types of prevention occurring within a single investment.”<sup>53</sup>*

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<sup>50</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 214

<sup>51</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, [Record of Proceedings](#), paragraph 302

<sup>52</sup> Health and Social Care Committee, Welsh Government draft budget 2024-25, February 2024

<sup>53</sup> [Welsh Government. Written response from the Welsh Government to the report by the Health & Social Care Committee entitled Welsh Government Draft Budget 2024-25. 1 March 2024.](#)



**77.** The Local Government and Housing Committee, in its report into Local Authority Leisure and Library Services, recommended that the Welsh Government should take all reasonable steps to develop stronger links between public leisure and health services, including developing a new policy framework for public leisure, which closely links with health and wellbeing services. The Welsh Government accepted the recommendation, stating that it “recognises the vital role that public leisure services play in supporting the health and wellbeing of the nation.”<sup>54</sup>

**78.** The Minister told us that he is “a huge believer” in his portfolio and all of the things it can offer in terms of prevention or support for health. He said: “I think we should seek to do more where we can.”<sup>55</sup>

## **The budget process**

**79.** Witnesses suggested that their situations could be improved, not just by increased funding from the Welsh Government, but by changes in the Welsh Government’s budget process.

**80.** Longer term funding settlements covering more than a single financial year were called for by a number of witnesses including Community Leisure UK, WCVA, ACW, the Commission, Wales Hockey, Disability Sport Wales, StreetGames, Sport Wales and WSA. According to ACW:

*“Annual budget settlements do not allow us to effectively plan over the longer term, which is a key principle under the Wellbeing of Future Generations Act.”<sup>56</sup>*

**81.** The WLGA described the lack of medium-term financing as “a challenge”.<sup>57</sup> Similarly, WSA said that it does not allow for proper business planning and job certainty,<sup>58</sup> and Cyngor Gwynedd felt that having fiscal interventions over a longer period would facilitate service delivery.<sup>59</sup>

**82.** Witnesses, including the Library, called for adequate time to be able to prepare for cuts. Amgueddfa Cymru explained the rapid pace at which it had to

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<sup>54</sup> [Welsh Government, Response to the LGH Committee report on local authority library and leisure services](#)

<sup>55</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 165

<sup>56</sup> [Written evidence, IFRCS.35 Arts Council of Wales](#)

<sup>57</sup> [Written evidence, WLGA](#)

<sup>58</sup> [Written evidence, IFRCS.46 Welsh Sports Association](#)

<sup>59</sup> [Written evidence, IFRCS.20 Cyngor Gwynedd](#)

reduce its outgoings given the lack of time between cuts being announced and the need for them to be implemented.<sup>60</sup>

**83.** There were also calls for greater flexibility in how Welsh Government funding is spent. For example, Amgueddfa Cymru explained that they have been unable to spend additional in-year funding provided by the Welsh Government, due to restrictions imposed by the Welsh Government in how they could use this funding.<sup>61</sup> When the Welsh Government announced additional capital funding for the culture sector in July 2024, including £1.3 million for Amgueddfa Cymru, they had to develop a Business Justification Case to access the money.<sup>62</sup>

**84.** Amgueddfa Cymru explained that with grant-in-aid funding there is “an understanding about how it can be spent”, but when funding is given through projects, a business case must be made “and that can be a very lengthy process”.<sup>63</sup> They said:

*“it’s not just a lot of work for us, it’s a huge amount of work for Welsh Government officials as well. Our business justification cases can bounce back and forth and back and forth over a period of months, just because the Welsh Government perspective of what might be needed might be slightly different from my team’s understanding of what might be needed, and you have to find a middle ground, et cetera. So it can be a very lengthy process to be able to secure capital funding. That can take quite a lot of the year, and then you’re left with very little of the year to spend it.*

*For me, the most efficient way that would enable us to deliver the maintenance programme we need in a way that would benefit both the way we work and the way that the Government could work would be to incorporate those project allocations into our capital grant in aid. We would be fully accountable for them, so it wouldn’t be loosely spending money in some way, but it would mean we could start the year being*

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<sup>60</sup> Letter from Amgueddfa Cymru providing written evidence in relation to the Committee’s inquiry into the impact of funding reductions for culture and sport, 18 October 2024

<sup>61</sup> Letter from Amgueddfa Cymru providing written evidence in relation to the Committee’s inquiry into the impact of funding reductions for culture and sport, 18 October 2024

<sup>62</sup> Letter from Amgueddfa Cymru providing written evidence in relation to the Committee’s inquiry into the impact of funding reductions for culture and sport, 18 October 2024

<sup>63</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 11 December 2024, Record of Proceedings, paragraph 13

*able to actually work on those projects rather than taking months before we can get started.”<sup>64</sup>*

**85.** We discussed the process the Welsh Government requires the Amgueddfa to follow to access this capital funding with the Minister who said that his officials have “worked alongside” and “supported” the Amgueddfa through the business case process.<sup>65</sup> He believes “that is the right thing to do” and that he “won’t change my opinion on that”. However, he’s “happy to be persuaded otherwise” if the Committee wants to make a recommendation that a business case was not needed.<sup>66</sup>

**86.** The Library asked to be allowed to carry over more grant money from one financial year to the next:

*“as unanticipated funds are received late in the financial year due to underspends in other areas or specific circumstances, and the offer to carry over (with a robust business plan) enables spending to be planned in the most effective way possible to get value for money.”<sup>67</sup>*

**87.** According to the Federation of Museums and Galleries of Wales, even when projects are notionally accepted over more than one financial year, there is no guarantee of funds being available beyond the first year.<sup>68</sup> ACW explained that being able to carry funds over would give them a better chance of being strategic in the way that money is spent.<sup>69</sup>

**88.** Although all additional funding was welcomed, witnesses noted the problems posed by receiving unexpected funding mid-way through a financial year. ACW called the additional funding it received a “sticking plaster”, adding that such grants “don’t answer the long-term demand to solve some of the problems that a lack of funding causes.”<sup>70</sup>

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<sup>64</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 11 December 2024, [Record of Proceedings](#), paragraphs 14-15

<sup>65</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 138

<sup>66</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 140

<sup>67</sup> [Written evidence, IFRC5.52 National Library of Wales](#)

<sup>68</sup> [Written evidence, IFRC5.42 Federation of Museums and Galleries of Wales](#)

<sup>69</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 268

<sup>70</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 176

## Statutory protection

**89.** Some witnesses, for example ACW, Chapter Arts Centre and Swim Wales, called for statutory protection for their sectors. According to ACW:

*“statutory responsibility would mean that there would have to be far more scrutiny and discussion in terms of local authorities’ spending on the arts and arts provision, and it would mean a level of protection in the sense that things couldn’t be sort of cut as the first place to cut.”<sup>71</sup>*

**90.** Swim Wales called on the Welsh Government to “grant aquatic facilities protected status, similar to how libraries are treated”, adding that “this status would recognise swimming pools and leisure centres as essential community assets, safeguarding them from closure due to financial pressures.”<sup>72</sup>

**91.** The Books Council stated that they support statutory protection “in principle” but noted that “thousands of libraries” have closed over the past decade even though they are a statutory service.<sup>73</sup>

**92.** The Federation of Museums and Galleries called for statutory protection for museum collections, noting that “Wales has a unique opportunity to set a precedent for the rest of the UK”.<sup>74</sup>

**93.** Local government witnesses highlighted the funding pressures on non-statutory services. Conwy Borough Council said that “everything is on the table that’s not statutory at the moment.”<sup>75</sup> However, Huw Thomas, representing the WLGA, said he was not in favour of statutory protection for culture and sport services without the funding alongside it.<sup>76</sup>

**94.** The Minister told us that the question around giving statutory protection to sport and culture services is “an interesting one”, adding that he is not “in the space at the moment” to recommend that course of action. He said that funding would need to be attached to any statutory protection, otherwise it would be

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<sup>71</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 256

<sup>72</sup> [Written evidence, IFRCs 37 Swim Wales](#)

<sup>73</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 206

<sup>74</sup> [Written evidence, IFRCs 42 Federation of Museums and Galleries of Wales](#)

<sup>75</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 18

<sup>76</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 163

difficult for local authorities to do more things, and to ask them to do so would be “particularly unfair”.<sup>77</sup>

## **Our view**

**95.** Because of cuts to culture and sport in the 2024-25 budget, these sectors have all seen a significant real terms reduction in revenue funding over the past decade. Historic under-funding of these sectors by the Welsh Government means they were not equipped to respond to such significant cuts.

**96.** We note that an international comparison shows that Welsh Government funding of culture and sport is lower than most European nations. We believe that this highlights the lack of strategy, vision and direction from the Welsh Government in terms of culture and sport, and should be rectified.

**Recommendation 1.** The Welsh Government should increase funding for culture and sport until they are comparable (in terms of spending per head) with those of similar nations.

**97.** The Well-being of Future Generations (Wales) Act 2015 is a clear expression of the Welsh Government’s intent to plan services for the longer term, but the consistent under-funding of culture and sport show it is yet to put this intention into practice. As a result, “A Wales of vibrant culture” is the least developed goal to date, even though access to sport and culture should be intrinsic to a high quality life.

**98.** The Welsh Government needs to do more to make the aspirations of the Well-being of Future Generations (Wales) Act 2015 a reality. We know that it is far cheaper to invest in preventative care than to treat ill-health, but the ability of culture and sport to improve physical and mental wellbeing has been under-appreciated by the Welsh Government. The Welsh Government needs to play a more prominent role in promoting the value of sport and culture in delivering health outcomes. We therefore support the Health and Social Care Committee’s recommendation from its report on the 2045-25 draft budget that the Welsh Government should consider introducing, across all its departments, a ‘preventative’ category of spend in future budgets, moving towards a longer term budgeting view in order to help build and protect population health. A preventative category of spend in the culture and sport budgets would help

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<sup>77</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 162

recognise and properly fund these sectors for the value they have beyond their intrinsic worth.

**99.** The National Exercise Referral Scheme is an excellent example of how physical activity can have positive effects on health outcomes. Given its success, we were disappointed to hear that local authorities are able to offer sessions to fewer people now than when the scheme was introduced due to increased costs. We know that preventative work is likely to be far cheaper than medical interventions further down the road. We therefore ask the Welsh Government to revisit the fees involved in the scheme.

**100.** We note that the Local Government and Housing Committee, in its 2023 report into Local Authority Leisure and Library Services, recommended that the Welsh Government should take all reasonable steps to develop stronger links between public leisure and health services, including developing a new policy framework for public leisure, which closely links with health and wellbeing services. We note that this was accepted by the Welsh Government and we would be grateful for an update on progress in implementing the recommendation.

**Recommendation 2.** The Welsh Government should consider introducing, across all its departments, a 'preventative' category of spend in future budgets, moving towards a longer term budgeting view to help build and protect population health. This would help recognise and properly fund culture and sport for the value they have beyond their intrinsic worth.

**Recommendation 3.** The Welsh Government should revisit the fees involved in the National Exercise Referral Scheme.

**Conclusion 1.** The Welsh Government should provide an update on implementing recommendation 6 in the Local Government and Housing Committee report on local authority library and leisure services.

**101.** Organisations have received a varying degree of reduction in local authority funding. We heard that the lack of statutory protection for culture and sport services makes them vulnerable to cuts. But statutory protection alone, without extra funding, is not enough to protect these sectors. We are not convinced that there is a need for new legislation. Instead, as discussed above, we would like to see the Welsh Government giving these non-statutory services the value and recognition they deserve. To do that, the Welsh Government needs to develop a collaborative cross-department strategy for funding culture and sport, which

recognises that they are intrinsic to achieving the goals of the Well-being of Future Generations (Wales) Act 2015.

**102.** We were particularly interested to hear about a pre COVID joint fund of £5 million between sport and health. We would like to see such a fund resurrected and the Welsh Government moving away from a siloed approach to budgeting. In future, when considering the budget for culture and sport, the Welsh Government should consider the difference and savings that investment in these sectors can make to other areas, particularly health and education. The systematic reduction in funding over the last decade has affected the ability of organisations to be able to contribute more widely to health and education agendas, and contribute to the Welsh economy.

**Recommendation 4.** The Welsh Government should develop a collaborative cross-department strategy to funding culture and sport, to ensure that funding decisions are joined up with wider government priorities, especially health and education. This strategy should recognise sport and culture as key vehicles to achieving the goals of the Well-being of Future Generations (Wales) Act 2015.

**103.** We also heard from witnesses that there are ways that the Welsh Government can help culture and sport, not simply by providing more money, but by providing more flexibility as to how it allocates this funding. Funding recipients should be treated and funded as trusted partners, in a more reciprocal and collaborative relationship. The Welsh Government should proactively remove barriers that make it more difficult for organisations to spend the money that they are given, especially in these particularly difficult times.

**Recommendation 5.** The Welsh Government should empower culture and sport organisations by enabling them to spend additional funding provided by the Welsh Government according to their own governance processes, and not requiring undue additional authorisation from the Welsh Government. In doing so, it should consider how it can remove barriers such as business case requirements, and instead provide more funding as additional contributions to their grant-in-aid.

## 2. The state of culture and sport

### Participation and attendance

**104.** The arts indicators in the National Survey for Wales show that all forms of cultural attendance are down compared to pre-pandemic levels.<sup>78</sup> Witnesses highlighted that the 2024-25 cuts come at a time when income is down due to reduced attendances, recent years of high inflation have led to increased costs, and following historic low levels of funding. As such, they have little, if any, capacity to absorb the most recent cuts.

**105.** NTW told us that “we can’t expect audiences to pick up the tab for cuts and squeezes that are happening”.<sup>79</sup> ACW said that audiences are also feeling the effects of their own cost of living increases:

*“The cuts have had a significant impact across the venues sector –which is still feeling the impact of the pandemic and most have not returned to prepandemic levels of attendance. It was struggling before, and this has exacerbated a fragile situation. Added to this the associated high cost of catering and refreshments product is adding to the overall deficit.”<sup>80</sup>*

**106.** Pembroke Dock Heritage Centre<sup>81</sup> and Merthyr Tydfil Museums Service<sup>82</sup> noted that the cost of living crisis has led to a decrease in visitor numbers, placing further strain on financial resources. In addition to feeling the cost of living crisis, Chapter told us that people are spending more time at home or their habits have changed since COVID.<sup>83</sup>

**107.** We heard that whilst live theatre and music has seen some increase in audience levels, other areas such as cinema are still in significant decline.<sup>84</sup> ACW explained that people have become “more choosy” in terms of how much they spend and what they spend – they want to know exactly what they are going to get for their money and certainty that it will be value for money. As a result, we

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<sup>78</sup> Welsh Government, National Survey for Wales headline results: April 2022 to March 2023

<sup>79</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 17

<sup>80</sup> [Written evidence, IFRCs.35 Arts Council of Wales](#)

<sup>81</sup> [Written evidence, IFRCs.09 Timothy Payne](#)

<sup>82</sup> [Written evidence, IFRCs.19 Merthyr Tydfil Museums Service](#)

<sup>83</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 115

<sup>84</sup> [Written evidence, IFRCs.35 Arts Council of Wales](#)



heard that venues become “more safe” in terms of the nature of their work and in turn there are fewer opportunities for new writers and new work.<sup>85</sup>

**108.** The Federation of Museums and Galleries said that there remains a huge shortfall at 69 per cent of pre-pandemic levels in terms of museum audiences. They said that “they are unlikely to recover if capacity and access continues to be reduced” because “rebuilding community trust and relevance requires resources.”<sup>86</sup>

## **Buildings and facilities**

**109.** A number of witnesses highlighted the effect of funding cuts on maintenance of buildings and facilities within the sport and culture sectors, and that some are at risk of closure. According to Creu Cymru:

*“Permanent closure of venues will have long lasting impacts on the community and cultural landscape, reducing access to cultural experiences and spaces for artistic expression.”<sup>87</sup>*

**110.** Cardiff Met School of Sport and Health Sciences noted that venues closing will have a significant impact on the social, physical and mental health of communities.<sup>88</sup> We heard from Music Venue Trust that 16 music venues are at risk of closure and that this would be a “catastrophe to the Welsh grassroots music scene,” adding that “many venues provide additional activities and benefits to their local communities”.<sup>89</sup> Conwy Council said that it is “working to find ways to keep at least a minimum provision” of services open, knowing that if they close facilities “the chances of them reopening are close to non-existent.”<sup>90</sup>

**111.** Community Leisure UK described an “ageing” public leisure and culture stock that “will require significant capital investment soon”.<sup>91</sup> WLGA told us that “the capital grant that councils get from the Welsh Government no longer allows us to keep pace with the cost of maintenance.”<sup>92</sup> Isle of Anglesey County Council said that buildings are not fit for purpose and that they are becoming more dependable on external grant funding:

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<sup>85</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 236

<sup>86</sup> [Written evidence, IFRCs 42 Federation of Museums and Galleries of Wales](#)

<sup>87</sup> [Written evidence, IFRCs 25 Creu Cymru](#)

<sup>88</sup> [Written evidence, IFRCs 05 Cardiff Met Uni. – School of Sport and Health Sciences](#)

<sup>89</sup> [Written evidence, IFRCs 29 Music Venue Trust](#)

<sup>90</sup> [Written evidence, IFRCs 26 Conwy County Borough Council](#)

<sup>91</sup> [Written evidence, IFRCs 32 Community Leisure UK](#)

<sup>92</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 68

*“however due to the high level of applications for various sources of funding it has become increasingly more difficult to successfully apply for funding.”<sup>93</sup>*

**112.** Community Leisure UK called for “a clear plan for capital investment in local authorities and their partners to assist with sustainability and building efficiency.”<sup>94</sup>

**113.** Film Hub Wales also called for increased capital investment, noting that venues struggle to fund changes in digital cinema technology and to buy kit for community screenings.<sup>95</sup>

**114.** One participant in our engagement activities said that public funding is needed for maintaining the buildings and paying the bills, as they cannot look to other sources for help in this area.

**115.** WSA noted that following reductions in spend by local authorities on sport and leisure, changes to patterns of maintenance of sport facilities have created severe backlogs. For example, they highlighted reports of issues relating to grass pitches and associated toilet and shower blocks. The WSA called for a plan to tackle outstanding maintenance backlogs, including “a realistic assessment” of the capital cost of renewing and refreshing public sporting facilities across Wales.<sup>96</sup>

**116.** Northop Hall Ladies Hockey Club said that they have to play home games in England due to lack of funding to support their home pitch which is prone to flooding.<sup>97</sup> Gwent Hockey Club described their facilities as “substandard” compared with facilities used by opposition clubs in the West of England.<sup>98</sup>

**117.** The Football Association of Wales (FAW) said that:

*“Poor facilities are the number one issue affecting players and clubs, and pitches are deteriorating with worsening weather conditions, with over 40% of matches being postponed by weather in some winter months. Currently across Wales only 21% of pitches are rated at ‘good’ standard; only 23% of*

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<sup>93</sup> [Written evidence, IFRCs.17, Isle of Anglesey County Council](#)

<sup>94</sup> [Written evidence, IFRCs.32, Community Leisure UK](#)

<sup>95</sup> [Written evidence, IFRCs.33, Film Hub Wales](#)

<sup>96</sup> [Written evidence, IFRCs.46, Welsh Sports Association](#)

<sup>97</sup> [Written evidence, IFRCs.27, Northop Hall Ladies Hockey Club](#)

<sup>98</sup> [Written evidence, IFRCs.38, Gwent Hockey Club](#)

*changing facilities are rated at a 'good' standard and 54% state that artificial pitches are difficult to access.”<sup>99</sup>*

**118.** FAW went on to say that they want to be able to invest at least £10 million a year into improving facilities in communities across Wales to bring them up to standard. They noted that Welsh Government support is a key element to achieve that ambition and any cuts in funding will impede their ability to deliver. Wales Hockey also called for capital funding for the specific enhancement and upgrade of sports facilities.<sup>100</sup>

**119.** Timothy Payne told us that the Pembroke Dock Heritage Centre is unable to afford necessary exterior repairs and decorations due to limited funds. He noted that this is causing deterioration, which could lead to further costs and potential safety issues. He called on the Welsh Government to provide grants or subsidies specifically aimed at preserving and maintaining historic buildings.<sup>101</sup> The Federation of Museums and Galleries of Wales said that building repairs which rely on local authorities to implement are “seemingly being ignored”.<sup>102</sup>

**120.** Sports organisations that took part in our engagement activities drew attention to rising facility hiring costs, some of them having doubled. Carmarthen Athletic Hockey Club described pitch hire costs as “astronomical”, meaning that they have to increase fees to counter the costs.<sup>103</sup>

**121.** Some of these sports organisations also noted recent investment in schools with no input from the sport sector. Such developments were viewed as a missed opportunity to focus on the needs of the school as well as the local community and consider inclusive opportunities with a range of facilities that support physical activity for all.

*“On one side of the community, we’ve got leisure facilities that are extremely aged and have fallen apart and a school down the road has brand new shiny facilities that aren’t fit for purpose and haven’t taken into consider what’s actually needed by the local community.”*

**122.** The LTA and Tennis Wales said that the Welsh Government should work with the sector to ensure that new sports facilities in schools cater for the demand for

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<sup>99</sup> [Written evidence, IFRCs 45 Football Association of Wales](#)

<sup>100</sup> [Written evidence, IFRCs 51 Wales Hockey](#)

<sup>101</sup> [Written evidence, IFRCs 09 Timothy Payne](#)

<sup>102</sup> [Written evidence, IFRCs 42 Federation of Museums and Galleries of Wales](#)

<sup>103</sup> [Written evidence, IFRCs 16 Carmarthen Athletic Hockey Club](#)

specific sports facilities in that area. They also called on additional funding streams for schools to enable the local community to make use of existing school sports facilities outside of school hours.<sup>104</sup> Welsh Athletics also called for such facilities to be available for local sport and physical activity provision during weekends.<sup>105</sup>

**123.** Wales Hockey said that there should be closer working at design phase to ensure new facilities are fit for purpose.<sup>106</sup> Gwent Hockey Club called for consideration of the impact on all sports in respect of facility funding to avoid a detrimental impact on certain sports.<sup>107</sup> Whereas Cardiff and Met Hockey Club called on their local authority and wider government to provide help in identifying possible partnerships with local schools asset transfers or available land which might be suitable to locate new facilities.<sup>108</sup>

**124.** We heard from Swim Wales that the condition of aquatic facilities in Wales have been “in steady decline for a decade” and that 30 per cent of swimming pools are at risk of closure over the next decade if action is not taken by central and local governments. They said that:

*“once a facility is closed, the cost of reopening or replacing it is often prohibitive, leading to a lasting reduction in community services.”<sup>109</sup>*

**125.** The WLGA called on the Welsh Government to consider reducing or removing the non-domestic rates paid on council leisure buildings.<sup>110</sup> The Federation of Museums and Galleries also asked for museums to be given direct relief from business rates.<sup>111</sup>

**126.** The Library told us that capital project delivery is 20 per cent more expensive than the pre-pandemic period, making expenditure on decarbonisation measures more challenging:

*“Progressive decarbonisation schemes were in place to make the Library net zero by 2030, but the financial climate, including inflation levels and uncertainty about future funding,*

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<sup>104</sup> [Written evidence, IFRCS 43, LTA & Tennis Wales](#)

<sup>105</sup> [Written evidence, IFRCS 47, Welsh Athletics](#)

<sup>106</sup> [Written evidence, IFRCS 51, Wales Hockey](#)

<sup>107</sup> [Written evidence, IFRCS 38, Gwent Hockey Club](#)

<sup>108</sup> [Written evidence, IFRCS 39, Cardiff and Met Hockey Club](#)

<sup>109</sup> [Written evidence, IFRCS 37, Swim Wales](#)

<sup>110</sup> [Written evidence, WLGA](#)

<sup>111</sup> [Written evidence, IFRCS 42, Federation of Museums and Galleries of Wales](#)

*has increased the risk to expenditure on decarbonisation measures, thereby placing at increased risk their positive impact on the environment and sustainable development commitments.”<sup>112</sup>*

**127.** Pedr ap Llwyd, former Chief Executive of the Library, noted that:

*“A failure to maintain adequate conservation practices or to invest in the fabric of the building will lead to long-term damage, which may be irreversible if left unaddressed.”<sup>113</sup>*

**128.** Anglesey County Council also noted the “significant challenge” for leisure centres to become Net Zero by 2030 without further investment.<sup>114</sup>

**129.** Witnesses told us about the negative effects of increases in utility bills on their organisations. For example, the Library noted that the cost of electricity and gas has increased by 33 per cent.<sup>115</sup> One participant in our engagement activities said:

*“We had an £85,000 hole in our accounts last year purely because of the increase in utility bills alone. That’s not something people will fund, it’s not an artistic project.... So, we’re having to really, really reduce core activity and figure out what is it that we can do every single day that’s going to make us money and keep us afloat every single day.”*

**130.** Timothy Payne of Pembroke Dock Heritage Centre called for energy efficiency grants.<sup>116</sup> Chapter also called for support with utilities to help lower energy costs. They suggested that the Welsh Government should provide incentives for more environmentally sustainable opportunities such as solar panels, insulation and windows for older buildings.<sup>117</sup> The WLGA called on the Welsh Government to lower energy tariffs for organisations whose main aim is the maintenance and improvement of people’s physical or mental well-being.<sup>118</sup>

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<sup>112</sup> [Written evidence, IFRCs.52 National Library of Wales](#)

<sup>113</sup> [Written evidence, IFRCs.14 Pedr ap Llwyd](#)

<sup>114</sup> [Written evidence, IFRCs.17 Isle of Anglesey County Council](#)

<sup>115</sup> [Written evidence, IFRCs.52 National Library of Wales](#)

<sup>116</sup> [Written evidence, IFRCs.09 Timothy Payne](#)

<sup>117</sup> [Written evidence, IFRCs.21 Chapter Cardiff Ltd](#)

<sup>118</sup> [Written evidence, WLGA](#)

**131.** During our scrutiny session with the Minister, a Welsh Government official explained that they are working closely with local authority chief leisure officers to understand and audit the state and provision of leisure facilities.<sup>119</sup>

## Staffing

**132.** We heard that the funding cuts have led to job losses or reduced employment opportunities within the sector. Creu Cymru<sup>120</sup> and Equity<sup>121</sup> said that this was especially the case for freelancers. Having had to diversify during the pandemic, participants in our engagement activities said that many freelancers now face further challenges as cultural organisations struggle to offer them opportunities and contracts. Cultural organisations in rural areas especially, expressed concern about the impact of not being able to support freelancers, who either must consider a career change or relocate to more urban areas to seek work opportunities. One participant said:

*“We have internationally renowned artists who are asking if we can pay their invoice today because they haven’t got enough money for the rent. It’s a regular occurrence, it’s not a one-off and not something we should be proud of.”*

**133.** Several witnesses spoke about the redundancies they have had to make to accommodate for the reduced funding, and its impact on capacity to deliver projects.

**134.** The Library told us that “staffing costs are the single highest item”. They responded to the budget cut by offering a voluntary exit route and by freezing recruitment to vacant positions.<sup>122</sup> This resulted in the loss of ten per cent of the workforce.<sup>123</sup> The Commission also decided to freeze posts unless the role was “absolutely fundamental” to delivery.<sup>124</sup>

**135.** Many of the organisations that took part in our engagement activities noted their inability to offer increased salaries to their staff; and the detrimental effect of

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<sup>119</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 51

<sup>120</sup> [Written evidence, IFRCs 25, Creu Cymru](#)

<sup>121</sup> [Written evidence, IFRCs 03, Equity](#)

<sup>122</sup> [Written evidence, IFRCs 52, National Library of Wales](#)

<sup>123</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 19

<sup>124</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 202

that on the workforce. Organisations also highlighted the insecurity of year-on-year contracts, and their impact on staff retention. We heard from ACW that artists are leaving the sector to take up non-creative roles that offer more financial security.<sup>125</sup> Similarly, WSA said that pay rates are unfavourable compared to other sectors and many are reporting significant difficulty in recruiting.<sup>126</sup> LTA and Tennis Wales noted an “increasing trends of individuals within the sector moving to English sports organisations or out of sport completely”.<sup>127</sup>

**136.** All organisations that took part in our engagement activities spoke about staff commitment and their passion to serve their communities and preserve their sport and art form. However, they noted that staff morale is at an all-time low, and the need to address staff wellbeing greater than ever. The Commission noted that staff are “now doubling up and doing two jobs”, meaning that they operate at “high levels of stress”.<sup>128</sup>

**137.** Beicio Cymru told us that redundancies have compromised their ability to maintain current operations and pursue new initiatives.<sup>129</sup>

**138.** The Welsh Government has provided figures for employment across its culture and sport arm’s length bodies in 2010 and 2024. These show a reduction in permanent staff across all the culture bodies, with a slight increase at Sport Wales.

<b>Arm’s Length Bodies</b>	<b>Current</b>	<b>2010</b>
<b>Amgueddfa Cymru</b>	593 (& 206)	631 (& 147)
<b>National Library</b>	178 (& 25)	282.3 (& 7.3)
<b>Arts Council of Wales</b>	88	94
<b>Royal Commission</b>	22.2 (& 7)	32.5 (& 12)
<b>Sport Wales</b>	145.85	143.5

**NB. For Amgueddfa Cymru and the Arts Council of Wales the figures provided are headcount. For the National Library of Wales, the Royal Commission on the Ancient and Historical Monuments of Wales and Sport Wales the figures provided are Full-Time Equivalent (FTE). The figures for permanent staff are provided, with project and/or casual staff in brackets.**

<sup>125</sup> [Written evidence, IFRCs 35 Arts Council of Wales](#)

<sup>126</sup> [Written evidence, IFRCs 46 Welsh Sports Association](#)

<sup>127</sup> [Written evidence, IFRCs 43 LTA & Tennis Wales](#)

<sup>128</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 206

<sup>129</sup> [Written evidence, IFRCs 30 Beicio Cymru](#)

## **Publishing**

**139.** After receiving a high volume of correspondence about the impact of funding cuts on the publishing sector, we held a roundtable discussion with publishing representatives on 28 November 2024.

**140.** Publishers described a sector at breaking point, with some facing real-terms cuts of 50 per cent over a decade. As a result of rising costs, declining sales and reduced funding, some said that 2024 was their worst year ever, including the pandemic. Many doubted if they would still be in business in a year's time.

**141.** Publishers noted the importance of government-funded publishing in Wales. The relatively small population, they said, meant that public investment is needed to make books about and for Wales economically viable. This necessity is most acute in the Welsh language. They explained that, despite the need for public funding, this generally accounts for less than 20 per cent of sales income. This makes public investment in Welsh publishing, they felt, good value for money. As with other aspects of culture and sport, publishers highlighted that it's much easier and cheaper to keep the current publishing industry going with adequate funding, than it is for it to collapse and the government have to rebuild it from scratch.

## **Our view**

**142.** Witnesses spoke about the perfect storm of funding reductions from all directions and at the same time. We heard that the impact of inflation, rising costs and reduced participation post COVID has exacerbated the financial strain of historic low levels of funding. As such, they have little, if any, capacity to absorb the most recent cuts.

**143.** Given these financial pressures, we heard that it is difficult to maintain sport and cultural facilities, and that some have actually closed or facing closure. We are deeply concerned about the current state of sport and cultural facilities in Wales and believe that the Welsh Government should be working with local authorities to audit the state of these non-statutory services. We note that the Welsh Government is working with the Chief Leisure Officers Wales group to determine the condition of leisure facilities in each local authority, but we believe that this should also include culture and arts facilities.

**144.** Culture and sport should not be viewed as “nice to haves”, but fundamental building blocks of a happier, wealthier and healthier Wales. They are intrinsic to



the human experience and should be viewed as such by the Welsh Government. We are concerned about the current state of sport and culture facilities and want to see them receiving the investment they deserve. The Welsh Government, in partnership with local authorities, should ensure that these important community assets remain available in our communities, and that facilities including pitches are up to standard. This review should include working with local authorities to better understand the current use of sport facilities in schools and explore how they can open up and make better use of facilities. The Welsh Government has invested heavily in its 21<sup>st</sup> Century Schools and Education Programme, but there is limited joined-up thinking about how these new facilities can benefit sports clubs and the wider local community. We are also aware of the barriers schools face when trying to open out of teaching hours.

**145.** In our report on participation in sport and physical activity in disadvantaged areas, we recommended that the Welsh Government fund the opening up of school facilities in disadvantaged areas to increase opportunities to participate in sport and physical activity in those areas. The Welsh Government accepted this recommendation in principle, noting that it is already providing funding to support schools to operate and develop as Community Focused Schools, reaching out to engage with families and work with the wider community to support all pupils, particularly those disadvantaged by poverty.<sup>130</sup> We would be grateful for an update on progress in implementing this recommendation.

**Recommendation 6.** The Welsh Government should conduct a comprehensive review of the state of sport and cultural facilities, including how to make best use of sport facilities at schools. This review should consider the barriers that might prevent greater use of school facilities out of teaching hours and how to overcome those barriers.

**Conclusion 2.** The Welsh Government should provide an update on progress in implementing recommendation 3 in our report on participation in sport and physical activity in disadvantaged areas.

**146.** We heard that staffing issues are prevalent across the sport and culture sectors, with organisations facing difficulties in retaining and attracting qualified people. Reduced salaries and insecure contracts have led to people leaving the

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<sup>130</sup> [Welsh Government, Response to the Culture, Communications, Welsh Language, Sport, and International Relations Committee report on participation in sport and physical activity in disadvantaged areas](#)

sector and decreased staff morale, and organisations have little choice but to introduce redundancies.

**147.** We note that a significant amount of the additional funding from Welsh Government has gone on redundancies and we are concerned about the impact of these redundancies on the future of the sector. Figures provided by the Minister show a reduction in permanent staff across all the culture bodies. Despite this, we heard that organisations are still trying to deliver the same level of service, but with fewer people. This is unsustainable, not to mention the skills gap that is likely to be created as a result. For us to gain a better understanding of the current state of organisations and the value of the additional funding provided, we ask the Welsh Government to provide us with a breakdown of how the additional in-year funding of £5 million provided in September 2024 has been spent, including whether this funding supported redundancy costs. We are concerned that the Welsh Government does not fully understand the impact of recurrent funding cuts on the sector and we hope that more data will help inform future investments in these important sectors.

**Recommendation 7.** The Welsh Government should provide the Committee with a breakdown of how the additional in-year funding of £5 million has been spent.

## 3. Sector response

### Priorities

**148.** All organisations that took part in our engagement activities spoke about the impact of reduced funding on their priorities, growth and ambitions. One organisation told us:

*“The principles and things you want to achieve in terms of targets have to come second to survival....This has an impact on the people who work with us – the communities and the most vulnerable people who need us. This is the real impact.”*

**149.** Organisations also spoke about having to scale back on existing projects and either having to adapt new projects or not start them at all:

*“We’ve just been shortlisted for an innovation award for a home delivery service to people’s homes over winter, but we haven’t actually got the money from anywhere to deliver it now.”*

*“There’s been some core programmes that we’ve been running for 20 years that we’ve just had to let go of [...] we have to make stringent decisions about which projects we run, which we think are the most beneficial within the communities we’re serving.”*

**150.** Some organisations referenced their frustration at having to limit their range of programmes. One participant said:

*“We are a theatre. People come to us, they want to see drama, they want to see musicals, and really the only thing we can afford to put on is live music and some stand-up comedy, because it’s one of the only things that really cover their own bills.”*

**151.** The Musicians’ Union said that even the largest organisations are coping with the current situation by simply reducing the quality and/or quantity of what they do.<sup>131</sup> NTW said that they are trying to do more with far less, and it has become

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<sup>131</sup> [Written evidence, IFRCs 44 The Musicians’ Union](#)

unsustainable for the individuals involved in trying to deliver those activities.<sup>132</sup> ACW told us that new or proposed work is being set aside in favour of “tried and trusted activity” as the cost and risks involved are lower:

*“It has also meant less investment in new or experimental work, and less touring of product or co-producing – all of which are seen as ‘higher risk’ for attracting audiences and – in the case of production/touring – much higher upfront costs to the venue or company which are harder to recuperate through ticket sales which are unknown and fully reliant on audience numbers, which are often unpredictable. The cost of touring in set build, accommodation and fuel is limiting the amount of product available and the amount of product we can fund.”<sup>133</sup>*

**152.** Likewise, Music Venue Trust noted that “programming of new and original music is the most obvious casualty of a lack of funding”.<sup>134</sup>

**153.** Cyngor Gwynedd said that they have had to cut the total grant fund for supporting the arts in the county. They have also had to restructure library services including closing some services, for example the Library service for schools and the Library Lorry have come to an end.<sup>135</sup>

**154.** The Library explained how they responded to the cuts by prioritising “front-line services”.<sup>136</sup> They are working with the board and with the staff to design a new strategic plan for the library, to look ahead in a positive way and explore different ways of providing services.<sup>137</sup> In terms of the Library’s outreach work, they have been trying to safeguard the community and digital work, but would probably be unable to continue to do so if they were to face a cut at the same level as last year.<sup>138</sup>

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<sup>132</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 17

<sup>133</sup> [Written evidence, IFRCs 35 Arts Council of Wales](#)

<sup>134</sup> [Written evidence, IFRCs 29 Music Venue Trust](#)

<sup>135</sup> [Written evidence, IFRCs 20 Cyngor Gwynedd](#)

<sup>136</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 19

<sup>137</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 20

<sup>138</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 44

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**155.** Being able to maintain basic level of service delivery only was a common theme in our evidence. For example, Sport Wales said:

*“Public funding traditionally supports investment in participation, tackling inequalities, safeguarding, governance (including intersectional equality issues, complaints, integrity, etc.). [...] Any further cuts, directly or in real terms through inflation, may mean that the NGB are able to do very little development work and are only able to maintain their basic legal duties.”<sup>139</sup>*

**156.** Similarly, the Commission explained that they have had to make substantial reductions in service delivery:

*“we are required under the terms of our Royal Warrant and the Historic Environment (Wales) Act to make a photographic and written record for posterity of the many significant buildings that are subject to wholesale or partial demolition in Wales, but we are only able in reality to record a fraction of these.”<sup>140</sup>*

**157.** WNO have found savings which mean that the organisation can “survive the next two years”, but explained that the survival is “incredibly perilous” because, given the current state of finances, “there is no room for error and any slip in any direction could put the company in jeopardy”.<sup>141</sup>

**158.** The Books Council told us that there is a risk to original Welsh-language books as a result of the cuts. We heard that creating an original book, especially a text and picture book, is costly and that is where the Books Council is seeing publishing companies cutting back, resulting in fewer opportunities for authors and illustrators from Wales.<sup>142</sup>

## **Income generation**

**159.** We heard that organisations are seeking alternative income streams to mitigate the impact of cuts.

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<sup>139</sup> [Written evidence, IFRCs 41 Sport Wales](#)

<sup>140</sup> [Written evidence, IFRCs 40 RCAHMW](#)

<sup>141</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 328

<sup>142</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 196

**160.** Chapter told us that there is “increased pressure on funding achieved via trusts and foundations, individual and corporate giving.”<sup>143</sup> However, Swim Wales said that commercial funders were put off by the Welsh Government’s reductions in funding for sport:

*“in all the discussions I have with future potential sponsors or external organisations—some really big names—they’re interested in supporting or working with sport, but all they see is the Welsh Government and other areas cutting, and they ask themselves, ‘Well, why am I putting a pound in?’”<sup>144</sup>*

**161.** The LTA and Tennis Wales said that “opportunities to secure commercial funding in sport are increasingly limited”.<sup>145</sup> StreetGames said that they have been focussing their attention on leveraging non-sports funding into sport, ensuring that non-sports funders understand the ways in which sport can deliver against their objectives and across policy areas.<sup>146</sup>

**162.** During our engagement activities, organisations commented how competitive the trusts and foundations applications process has become in recent years. For example, one organisation noted how they have written 25 applications in the first six months of 2024, with only one success.

**163.** Some organisations noted a narrowing in remit by many large core funders, limiting their eligibility to apply for the funding, and that the application process, including the Arts Council of Wales Investment Review, had become complex, time-consuming and very pressurised. They felt that opportunities to apply for additional funding increases pressure and fosters uncertainty, and the amount sought is often small. Wales Council for Voluntary Action noted that this funding environment “is perpetuating the funding challenges they are struggling to tackle”.

**164.** There were calls during our engagement activities for development of a strategy to allow organisations to focus on long-term planning and less on last-minute expenditure, to improve stability and aid a more strategic use of funding. There were also calls for a more concise way of distributing funding so that it’s not

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<sup>143</sup> [Written evidence, IFRCS 21 Chapter Cardiff Ltd](#)

<sup>144</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 304

<sup>145</sup> [Written evidence, IFRCS 43 LTA & Tennis Wales](#)

<sup>146</sup> [Written evidence, IFRCS 48 StreetGames](#)

so labour intensive from the perspective of the organisations applying for it; and improved signposting and support to access funding opportunities beyond ACW.

**165.** According to WNO there’s “a very noticeable lack of philanthropy in Wales” compared to other nations”. They are “deeply thankful to” and dependent on the philanthropists that do give to the WNO, but called for the Welsh Government to organise and promote a wider programme of encouraging philanthropy for the arts in Wales. They see the need for such a programme because “the sad fact is that we’re going to be more dependent on it as we move forward into the future”.<sup>147</sup> Similarly, Timothy Payne of Pembroke Dock Heritage Centre called on the Welsh Government to act as facilitator to connect organisations with potential corporate sponsors or philanthropists.<sup>148</sup>

**166.** ACW told us that lottery income has been used to supplement the cuts in grant in aid. They explained that:

*“This has put additional pressure on our lottery programmes and an overall reduction in the number of applications we are now able to fund, with some grant rounds achieving a success rate as low as 35% due to budget constraints. Applicants and other Lottery distributors have noted increased demand and competition.”<sup>149</sup>*

**167.** The Commission said that it has been “very successful in drawing down funding for all sorts of projects” but noted that external funding “isn’t guaranteed”. They also noted that they cannot apply for certain streams of funding, for example UK Research and Innovation, due to their status as a royal commission.<sup>150</sup> For that reason, we heard that the Commissioners “have it on their agenda at every meeting” whether they should seek charitable status.<sup>151</sup>

**168.** The Library said that they remain dependent on money from their private funds, but they are also seeking opportunities to increase income through retail outlets and commercial services.<sup>152</sup> Similarly, we heard that Amgueddfa Cymru

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<sup>147</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 397

<sup>148</sup> [Written evidence..IFRCS.09.Timothy.Payne](#)

<sup>149</sup> [Written evidence..IFRCS.35.Arts.Council.of.Wales](#)

<sup>150</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 305

<sup>151</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 312

<sup>152</sup> [Written evidence..IFRCS.52.National.Library.of.Wales](#)

has been charging for exhibitions to raise revenue, but they are “really clear” that they “will not charge for entry”.<sup>153</sup> They said:

*“where there is an activity that requires extra resource, time and expertise around it—so, it’s not just about opening up the collection, but it’s about curating a particular experience, exhibitions, talks, tours—then those are the kinds of activities we will charge for.”<sup>154</sup>*

**169.** In a separate piece of work we have been considering issues raised by cultural organisations charging for exhibitions. We discussed these with Amgueddfa Cymru, the National Library, the Association of Independent Museums and the former head of Glasgow Museums on 6 June 2024. The Amgueddfa told us that “events and exhibitions in themselves are relatively modest income streams” but note that “the value is far greater than just those incomes” as they bring different audiences in.<sup>155</sup> They said:

*“some of those events and exhibitions, although in themselves a very small proportion of the income that comes in, have a positive impact on our secondary spend for our cafes, for our shops, for our car parking, et cetera, and so the greater value of them is really important.”<sup>156</sup>*

**170.** Merthyr Tydfil Museums Service said that the introduction of charging, however small, has impacted visits from the local community, which is a lower socio-economic area.<sup>157</sup> The Federation of Museums and Galleries described admission charging as a “complex issue”, adding that:

*“Many independent museums prefer to encourage donations than charge for entry but most rely on income from admission fees.”<sup>158</sup>*

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<sup>153</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 11 December 2024, [Record of Proceedings](#), paragraph 64

<sup>154</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 11 December 2024, [Record of Proceedings](#), paragraph 65

<sup>155</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 6 June 2024, [Record of Proceedings](#), paragraph 75

<sup>156</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 6 June 2024, [Record of Proceedings](#), paragraph 76

<sup>157</sup> [Written evidence, IFRCS 19 Merthyr Tydfil Museums Service](#)

<sup>158</sup> [Written evidence, IFRCS 42 Federation of Museums and Galleries of Wales](#)



**171.** The Minister said “we have to make sure that access is for everybody” but it’s a decision for the arm’s-length bodies whether they charge for exhibitions.<sup>159</sup> According to a Welsh Government official:

*“The data that the museum itself has gathered about the response of the people who’ve paid to go into Big Pit and the people who paid to access the Art of the Selfie exhibition has been really positive. Most of the feedback has been that people would have been happy to voluntarily pay a charge for that quality of exhibition.”<sup>160</sup>*

**172.** Chapter described funding from trusts and foundations as “restricted”:

*“it’s not the same as having an unrestricted fund that just goes towards your core activity. You’ve always got to have an activity associated with it. So, it’s great to have, but brings its own hurdles, I suppose.”<sup>161</sup>*

**173.** NTW echoed that such funding is “not without its challenges”, noting that it’s “often not for core costs, often not for salaries, very much on a project-by-project basis”. They also highlighted that they have limited staff and the applications take time to complete, which has an impact on what they are able to achieve in terms of project delivery.<sup>162</sup>

**174.** Steffan Jones-Hughes of Oriel Davies Gallery said that “being entrepreneurial has become an additional essential, that takes time and money”.<sup>163</sup> Timothy Payne of Pembroke Dock Heritage Centre would like to see training programmes for volunteers and staff to build skills in areas such as fundraising to help diversify income streams.<sup>164</sup>

**175.** Rhyl and District Hockey Club said that “bid specific criteria” makes it “more difficult to access funding for general running costs” and that members spend “substantial amounts of time searching for potential sources of grant income” only

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<sup>159</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 28 November 2024, [Record of Proceedings](#), paragraph 185

<sup>160</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 80

<sup>161</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 87

<sup>162</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 89

<sup>163</sup> [Written evidence, IFRCs 06 Steffan Jones-Hughes](#)

<sup>164</sup> [Written evidence, IFRCs 09 Timothy Payne](#)

to find that the club does not fit the criteria that the majority of funds demand.<sup>165</sup> Gowerton Hockey Club described this process as “stressful” and “time consuming” given that they rely purely on volunteers.<sup>166</sup>

**176.** Cardiff Met School of Art and Design called for access to innovation funding to be amended, noting that several funding streams require match-funding or direct investment from businesses, which can be prohibitive for self-employed and micro-businesses.<sup>167</sup>

**177.** A number of witnesses, including local authorities and Creu Cymru, highlighted the importance of the Shared Prosperity Fund. However the WLGA noted because of the time limit attached to it and the uncertainty beyond next March, “it’s very difficult” to forge partnerships and to plan for the long term.<sup>168</sup> Community Leisure UK called on the Welsh Government to work with the UK Government on a more strategic approach to the fund to ensure that it is distributed fairly and effectively.<sup>169</sup>

**178.** WCVA noted that investment in core funding, as opposed to project activities, would help organisations innovate and expand their capacity:

*“Voluntary organisations can not become more financially resilient without investment in non-project activities which build their ability to generate income.”<sup>170</sup>*

**179.** The National Lottery Heritage Fund told us that they have made their application processes simpler, especially at the smaller end of the scale.<sup>171</sup>

**180.** The Welsh Government said given the challenging budget situation, arm’s-length bodies need to look at what else they can do to raise additional revenue.<sup>172</sup>

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<sup>165</sup> [Written evidence, IFRCS 01 Rhyl and District Hockey Club](#)

<sup>166</sup> [Written evidence, IFRCS 12 Gowerton Hockey Club](#)

<sup>167</sup> [Written evidence, IFRCS 04 Cardiff Met Uni. - School of Art & Design](#)

<sup>168</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 108

<sup>169</sup> [Written evidence, IFRCS 32 Community Leisure UK](#)

<sup>170</sup> [Written evidence, IFRCS 28 WCVA \(Wales Council for Voluntary Action\)](#)

<sup>171</sup> [Written evidence, IFRCS 53 The National Lottery Heritage Fund](#)

<sup>172</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 81

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## Collaboration

**181.** We received varied evidence on the extent of collaboration within the sport and culture sectors to mitigate the impact of the funding cuts.

**182.** Chapter told us that they work more collaboratively with partnerships and organisations across the nation since the funding cuts, to ensure that they are not working in parallel on the same things. They said:

*“We’ve always worked in partnership and collaboration, it’s the nature of our organisation, but we’re doing that much more now, because we’re all sharing more limited resources and we all want to reach, often, the same audiences and, therefore, the same ends to what we’re doing. So, we work very closely in collaboration, naturally, with organisations that are based in our building, but then also across Wales. It feels very important that we work more collaboratively and share our resources now than ever.”<sup>173</sup>*

**183.** NTW said that collaboration is “key to sustaining the arts sector”.<sup>174</sup> They called for more support from the Welsh Government to facilitate collaboration by having a national strategy so “that we’re all working towards a common goal”.<sup>175</sup>

**184.** WSA explained that they operate shared accounting and procurement facilities for their members.<sup>176</sup> Similarly, Netball Wales said that as a result of collaboration they have been able to reduce reliance on Sport Wales funding, for example by sharing jobs with Basketball Wales and seeking sponsorship from commercial sources.<sup>177</sup> Wales Hockey<sup>178</sup> and Disability Sport Wales<sup>179</sup> have also entered shared service operations.

**185.** The Commission explained that they are about to enter formal discussions with Cadw “to explore areas of common interest, potential synergies and better

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<sup>173</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 73

<sup>174</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 78

<sup>175</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 78

<sup>176</sup> [Written evidence, IFRCS 46, Welsh Sports Association](#)

<sup>177</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 236

<sup>178</sup> [Written evidence, IFRCS 51, Wales Hockey](#)

<sup>179</sup> [Written evidence, IFRCS 49, Disability Sport Wales](#)

ways of delivering our services” and that options range from more closely aligning work programmes to full merger. According to the Commission:

*“If Cadw and the Commission are to amalgamate, it should not be because we are forced to do so as a result of the burning platform of budget cuts. It should be because this would be in the best interests of the people and the historic environment of Wales.”<sup>180</sup>*

**186.** However, the Commission said that recent attempts to engage with the Welsh Government (including its historic environment division, Cadw), the Library and Amgueddfa Cymru over shared HR and financial services has shown that it is “not feasible in practice and that there are no savings to be made”. They said:

*“we are all operating very lean operations that are barely adequate to meet the needs of our individual institutions, without spare capacity to share with others.”<sup>181</sup>*

**187.** Cyngor Gwynedd told us that it is difficult to collaborate easily without that additional money and additional capacity.<sup>182</sup> Wales Hockey called for “clearer guidance and working practice” to promote greater collaboration and shared working practice.<sup>183</sup>

## **Our view**

**188.** All organisations report that reduced funding has forced them to prioritise survival over growth and long-term goals. Planning has become reactive, focusing on immediate budget cuts rather than strategic development. The funding landscape has become increasingly competitive, with application processes becoming more complex and less accessible. Organisations are struggling to diversify income streams, which is both time consuming and hampers their capacity to deliver services.

**189.** Due to budget cuts, organisations have had to scale back or cancel existing projects and delay starting new ones. This reduction limits their ability to offer diverse programmes, forcing them to focus on “safe” activities that can cover essential costs, often at the expense of broader community needs.

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<sup>180</sup> [Written evidence, IFRCs 40, RCAHMW](#)

<sup>181</sup> [Written evidence, IFRCs 40, RCAHMW](#)

<sup>182</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 104

<sup>183</sup> [Written evidence, IFRCs 51, Wales Hockey](#)

**190.** We would like to see organisations responding more strategically to their reduced income by, for example, sharing services and pursuing new commercial activities. This would be helped by greater leadership from the Arts Council of Wales and Sport Wales; ultimately backed by strategic direction from the Welsh Government, which has been lacking. If they were more resilient they would be far better placed to deliver the Welsh Government’s objectives and priorities.

**Recommendation 8.** The Welsh Government should provide greater strategic direction to enable the culture and sport sectors to thrive and deliver the Welsh Government’s objectives and priorities. To this end, the Welsh Government’s forthcoming Culture Priorities should contain clear and measurable commitments towards this aim.

## 4. Wider social and economic consequences

### Diverse and low socio-economic communities

**191.** We heard that reductions in services and increased fees affect everyone's ability to take part in leisure and cultural activities. However, a number of witnesses said that there is a disproportionate impact on people with protected characteristics and those of lower socio-economic status. The Centre for the Creative Economy said that:

*"These groups are already underrepresented and face significant barriers to entry and progression in the sector. Funding cuts will exacerbate these issues in complex ways, leading to reduced opportunities, exacerbated inequality, and a potential rollback of the progress made in promoting diversity and inclusivity within the cultural industries thus far."<sup>184</sup>*

**192.** WSA told us that any cuts in funding will have a direct impact on their ability to deliver programmes in the communities who need them the most.<sup>185</sup> Similarly, ACW said that in the time of financial pressures:

*"it is the socially, economically and culturally marginalised and less well represented and heard individuals, groups and communities in our society that suffer first."<sup>186</sup>*

**193.** According to Sport Wales:

*"There could be a significant undermining of the inclusivity agenda with cuts that have been received, and certainly any further cuts will likely contract the agenda of a broad sporting offer. This is an opportunity cost the sport sector cannot afford given that there is already a recognised underrepresentation by race, religion, ethnicity, gender, disability and deprivation."<sup>187</sup>*

**194.** Rhyl and District Hockey Club said that as a result of the increasing costs of running the club they are now struggling to provide financial support to members who cannot afford the costs associated with playing hockey.<sup>188</sup> Similarly, Welsh

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<sup>184</sup> [Written evidence, IFRCs 36, Cardiff University, Centre for the Creative Economy](#)

<sup>185</sup> [Written evidence, IFRCs 46, Welsh Sports Association](#)

<sup>186</sup> [Written evidence, IFRCs 35, Arts Council of Wales](#)

<sup>187</sup> [Written evidence, IFRCs 41, Sport Wales](#)

<sup>188</sup> [Written evidence, IFRCs 01, Rhyl and District Hockey Club](#)

Gymnastics said that they have had to suspend plans to invest more into their hardship fund, despite an increase in demand.<sup>189</sup> Weightlifting Wales said that funding towards a programme for deprived children has been cut by half.<sup>190</sup>

**195.** During our engagement activities, some cultural organisations spoke about their concerns relating to the impact of reduced funding on their work with refugees and asylum seekers, which is one of the few safe spaces they have to share and celebrate their culture and identity.

**196.** Sports organisations that took part in our engagement activities noted the increasing barriers facing people from low socio-economic backgrounds to accessing leisure and sports opportunities due to increasing costs.

*“There are enough barriers to entry for sport anyway, but cost is becoming increasingly the number one barrier now.”*

**197.** Creu Cymru called for targeted support for vulnerable groups, adding that a decline in diverse programming could lead to a less inclusive cultural sector.<sup>191</sup> They highlighted the importance of remembering that “arts aren’t a luxury, they’re not a means of entertainment; they can’t just become the privilege of the few when it’s the right of all of us.”<sup>192</sup>

**198.** Film Hub Wales said that cinemas have attempted to ensure access to people of lower socio-economic status by offering free tickets, pay-what-you-feel and other services such as food banks or free meals. However they noted that such offerings come with a cost.<sup>193</sup> Ruthin Craft Centre also noted that organising events for people with protected characteristics or for people of a lower socio-economic background involves “significant additional costs”.<sup>194</sup>

**199.** Chapter described the work that it is doing with communities but noted that “there needs to be increased investment in recognition of that” given the data around how “creativity and culture can help society, community cohesion and inclusiveness.”<sup>195</sup>

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<sup>189</sup> [Written evidence, IFRCs 02, Welsh Gymnastics](#)

<sup>190</sup> [Written evidence, IFRCs 34, Weightlifting Wales](#)

<sup>191</sup> [Written evidence, IFRCs 25, Creu Cymru](#)

<sup>192</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 37

<sup>193</sup> [Written evidence, IFRCs 33, Film Hub Wales](#)

<sup>194</sup> [Written evidence, IFRCs 10, Ruthin Craft Centre](#)

<sup>195</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 120

**200.** Sofia Lazaridi asked:

*“if cultural organisations can barely keep the lights on, how are they supposed to do all the outreach and engagement work to under-served communities that you so like to see?”<sup>196</sup>*

**201.** Welsh Gymnastics told us that the cuts are “disproportionately impacting on girls in sport, particularly high-performance sport.”<sup>197</sup> Wales Hockey said that women and girls in sport often face greater barriers to participation and cuts in funding may worsen this disparity.<sup>198</sup>

**202.** As a result of funding reductions, FAW have delayed the development of new, targeted programmes and projects specific to Women and Girls Football, Disability Football and football in underrepresented or deprived communities.<sup>199</sup>

**203.** Disability Sport Wales said that the funding cuts have a “compounding impact on access to opportunities for disabled people.”<sup>200</sup>

**204.** According to the Centre for the Creative Economy, continued investment in the cultural sector is crucial for ensuring that it “reflects and serves the diversity of the communities it represents”<sup>201</sup>

## **Rural communities**

**205.** Cultural organisations based in rural areas that took part in our engagement activities noted how the reduced funding has intensified their challenge to offer opportunities within rural areas, for all ages.

**206.** According to WLGA people living in rural areas are affected because the cost of providing facilities is higher as well as limited alternative private sector options.<sup>202</sup> Cyngor Gwynedd also noted the higher costs in rural areas, including transport costs to reach facilities.<sup>203</sup>

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<sup>196</sup> [Written evidence, IFRCs 15 Sofia Lazaridi](#)

<sup>197</sup> [Written evidence, IFRCs 02 Welsh Gymnastics](#)

<sup>198</sup> [Written evidence, IFRCs 51 Wales Hockey](#)

<sup>199</sup> [Written evidence, IFRCs 45 Football Association of Wales](#)

<sup>200</sup> [Written evidence, IFRCs 49 Disability Sport Wales](#)

<sup>201</sup> [Written evidence, IFRCs 36 Cardiff University, Centre for the Creative Economy](#)

<sup>202</sup> [Written evidence, WLGA](#)

<sup>203</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 123



**207.** Music Venue Trust called for the improvement of public transport links to open up access to culture.<sup>204</sup>

**208.** Wyeside Arts Centre told us that the venue is “at risk” and that investment in rural areas “is vital” due to the significant role venues play in the vibrancy of communities.<sup>205</sup>

**209.** The Minister told us that he wants to “get to a place where people can have the access to the culture and services that they need”.<sup>206</sup>

## **Future talent**

**210.** During our engagement activities, organisations expressed concern that they are unable to provide young people, especially those from lower socio-economic backgrounds, with a full range of opportunities to explore their potential and discover their creative and sporting talents. As such, Wales is depriving itself of future talent.

**211.** One organisation working with talented young people explained how dependent they are on grassroots organisations to nurture future talent. WNO told us that without grassroots support, there “just will be no pipeline anymore”:

*“It’s not about where we are now [...] but the worry is always for the future of the industry and what happens next. And without significant investment— [...] one day, we will simply wake up and there will be no talent left.”<sup>207</sup>*

**212.** There were calls from witnesses, including Chapter and Teledwyr Annibynnol Cymru (TAC), to consider how to attract young people to develop sector relevant training and support the talent pipeline.<sup>208</sup> The Library said:

*“We have lost some staff expertise – expertise that is unique to specific, physical and digital collections. Also lost were skills and knowledge that were key to collaboration across the sector to support local libraries and archives. The loss of these jobs and*

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<sup>204</sup> [Written evidence, IFRCs 29 Music Venue Trust](#)

<sup>205</sup> [Written evidence, IFRCs 13 Wyeside Arts Centre](#)

<sup>206</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 64

<sup>207</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 307

<sup>208</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 109; [Written evidence, IFRCs 50 TAC](#)

*skills is going to affect the wider sector's ability to deal with procurement in the future.”<sup>209</sup>*

**213.** According to NTW there is a “huge skills shortage in certain areas across the sector”. They called for more pathways into the sector through interventions such as apprenticeships for backstage and technical staff and ensuring specialist teaching across creative subjects in school.<sup>210</sup> Equity also called for an “urgent intervention” from the Welsh Government, stating that the “talent drain” is otherwise irreversible.<sup>211</sup>

**214.** Cultural organisations that took part in our engagement activities shared their concerns about the impact of the lack of creative opportunities on young people and future generations.

*“For young people to flourish in general, they all need to be creative. They all need to have that artistic opportunity and not just to have one opportunity, but to choose from a whole range of different ones.”*

*“People think a country can live without the arts. But you have to think of the arts as more than entertainment to understand the impact of the cuts.”*

**215.** Chapter explained that they have traditionally given free space to young and new individuals or organisations entering the arts, but that they have less availability now to help in the way that they used to.<sup>212</sup> Making Music<sup>213</sup> and Huw Milward<sup>214</sup>, game developer and musician, called for funding towards the provision of affordable practice spaces.

**216.** Sport Wales, Cardiff Met Uni, Weightlifting Wales and Welsh Gymnastics all noted in written evidence that the chance to compete at the highest level and represent Wales on the world stage is under threat because of reduced funding. Welsh Athletics said that the performance gap between Welsh based athletes and the rest of the UK and globally is increasing.<sup>215</sup>

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<sup>209</sup> [Written evidence, IFCRS 52 National Library of Wales](#)

<sup>210</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 111

<sup>211</sup> [Written evidence, IFCRS 03 Equity](#)

<sup>212</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 25

<sup>213</sup> [Written evidence, IFCRS 18 Making Music](#)

<sup>214</sup> [Written evidence, IFCRS 54 Huw Milward, Game Developer and Dim Parcio band](#)

<sup>215</sup> [Written evidence, IFCRS 47 Welsh Athletics](#)

**217.** Netball Wales explained that the Welsh National Netball Team is currently ninth in the world and the highest ranked Welsh sport team. In their 2030 strategy they set an aim to be in the world top six. However, they have recently revised that strategy and are now looking to maintain the ninth position because of money. They said:

*“We have 100 young women and girls in our pathway that are incredible netballers. That could really give us the quality we need on court to get us to top six, but, as it stands, with the budget pressures for us, we can’t give them those opportunities to prove themselves.”<sup>216</sup>*

**218.** Similarly, Squash Wales noted that they are not in a position to send a team to the Men’s and Women’s World Team Championships despite having a player in the top ten in the world rankings.<sup>217</sup>

**219.** Welsh Athletics have had to re-assess how they support their athletes and reduce the number of athletes receiving cash grants to support their activities.<sup>218</sup> Welsh Gymnastics said that elite athletes have to financially contribute more to their training<sup>219</sup> and Swim Wales spoke about “highly talented people representing their country” having to pay for their own travel. They said:

*“We’re trying to make our national teams and our pathways reflect a modern 2024 Wales, we’re looking at the future generations Act and all of the things that we’ve collectively signed up to, and we’re very, very far away from that, because they have to pay for their own. And we’re going to have that again—we’re going to have people who can afford it wearing a Welsh jersey, in whatever sport it is.”<sup>220</sup>*

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<sup>216</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 227

<sup>217</sup> [Written evidence, IFRCs 07 Squash Wales](#)

<sup>218</sup> [Written evidence, IFRCs 47 Welsh Athletics](#)

<sup>219</sup> [Written evidence, IFRCs 02 Welsh Gymnastics](#)

<sup>220</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 245

**220.** Sports organisations expressed concern during our engagement activities about the impact of underinvestment in facilities, on all levels, from the local swimming pool to world-class training facilities:

*“It’s been 25 years since anything that resembles a world-class training facility has been invested in and built in Wales, and yet we expect our athletes to be able to perform and inspire future generations.....We have a real potential of irreversible impact with our performance athletes.”*

## **Swimming lessons and school swimming**

**221.** We heard that school swimming is “at its worst position for over a generation due to reduced funding and increased costs.”<sup>221</sup> Swim Wales told us that the “irreversible effects of reduced funding” could “lead to a lost generation of learners and ultimately a higher risk of drowning fatalities.”<sup>222</sup>

**222.** There has been a decline in the number of children participating in school swimming programmes, with only 41 per cent of children in Years 3-6 able to swim 25 meters unaided as of the 2022/23 academic year.<sup>223</sup>

**223.** According to Swim Wales:

*“the current demographic in swimming lessons is white middle-class, and any attempts from Swim Wales and its national partners to make swimming lessons accessible to all has been made extremely difficult due to reductions in funding and increased costs.”<sup>224</sup>*

**224.** WSA noted that the reduction in school swimming participation is because schools cannot afford transport.<sup>225</sup>

**225.** Both Swim Wales<sup>226</sup> and Cyngor Gwynedd<sup>227</sup> called on the Welsh Government to ensure that all children have the opportunity to learn to swim as part of the Curriculum for Wales. Swim Wales explained that they have costed the

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<sup>221</sup> [Written evidence, IFRCs 37, Swim Wales](#)

<sup>222</sup> [Written evidence, IFRCs 37, Swim Wales](#)

<sup>223</sup> [Written evidence, IFRCs 37, Swim Wales](#)

<sup>224</sup> [Written evidence, IFRCs 37, Swim Wales](#)

<sup>225</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 206

<sup>226</sup> [Written evidence, IFRCs 37, Swim Wales](#)

<sup>227</sup> [Written evidence, IFRCs 20, Cyngor Gwynedd](#)

universal school swimming offer, including transport, at £4.4 million a year, describing it as “not a particularly big ask.” They said that it would increase children’s confidence, open up their physical literacy to other sports, as well as giving them a life skill.<sup>228</sup>

**226.** The Minister told us that he is aware there has been a decline in the number of young people who are able to swim by the time they leave primary school. He said that issues relating to the delivery of Curriculum for Wales are a matter for the Cabinet Secretary for Education, but that he is “keen to explore opportunities across government to see if more can be done.”<sup>229</sup>

## **Welsh Language and literacy**

**227.** We heard concerns about the effects of cuts to the publishing industry on the Welsh language and literacy.

**228.** The Books Council told us that reading is the foundation to develop language skills.<sup>230</sup> In terms of Welsh learners, the Books Council said that books for Welsh learners are their best sellers nearly every month. They explained that they’ve worked closely with the National Centre for Learning Welsh to develop suitable books, and they promote them through the whole programme for Welsh learners.<sup>231</sup> In terms of children, they said that any book is an educational resource, but a lot of work has also gone into developing bilingual books that are suitable for parents who have started to learn Welsh to support their children, without taking attention away from the Welsh language.<sup>232</sup>

**229.** The Books Council called on the Welsh Government to invest in buying books, because there are schools that do not have any books. According to the Books Council, such an intervention would support a Welsh Government funded product; support schools and young learners; and support local booksellers.<sup>233</sup>

**230.** The Books Council also told us that the Welsh Government has “an absolutely crucial role to play to develop a serious strategy about making Wales a reading

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<sup>228</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 261

<sup>229</sup> [Pwyntiau gweithredu Saesneg yn unig.pdf](#)

<sup>230</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 185

<sup>231</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 186

<sup>232</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 187

<sup>233</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 202

nation”.<sup>234</sup> They said that there is “no point in publishing books if nobody reads them” and therefore called for an “evidence-based approach to a sustained reading programme that includes schools, libraries and other stakeholders, and that treats both languages equitably.”<sup>235</sup>

**231.** Cyngor Gwynedd noted that the libraries for school service coming to an end could affect reading within schools.<sup>236</sup>

**232.** Publishers at the Committee’s round-table event highlighted the role that a thriving Welsh publishing sector could play in tackling Wales’s literacy problem and meeting the Welsh Government’s Cymraeg 2050 target for a million Welsh-speakers by the year 2050<sup>237</sup>.

**233.** The Minister said that the publishing industry plays, and will continue to play, a key role in supporting literacy improvements and the Welsh language. He recognised that the industry has faced challenges:

*“Recognising the challenges more generally in the industry, it’s a discussion I’ve already had with my officials in Creative Wales about how we can support them, going forward. We’ll see what budgets look like and how I can do that.”*<sup>238</sup>

**234.** He also committed to having discussions with the Cabinet Secretary for Education about the implications of funding cuts to the publishing sector for literacy.

## **Our view**

**235.** The culture and sport sectors are brittle and under-resourced, which has led to insufficient access to culture and sport across the nation, undermining attempts to broaden access by our national bodies. This insufficient access is likely to scar Wales’s culture and sport output for years to come, as fewer of tomorrow’s artists and sportspeople will have had the start and support they need to succeed. Culture and sport are not luxuries reserved for times of plenty. They are vital

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<sup>234</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 203

<sup>235</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 203

<sup>236</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 24 October 2024, [Record of Proceedings](#), paragraph 104

<sup>237</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, [Publishing industry roundtable discussion notes, December 2024](#)

<sup>238</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 179

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threads in the fabric of what makes life worth living. The social infrastructure fostered by culture and sport is as important for a nation as its transport and communication infrastructure, but has been neglected by successive Welsh Governments.

**236.** The lack of investment in facilities and nurturing future leaders threatens the sustainability and growth of the culture and sport sectors. We are concerned that participation is becoming more elitist and that talented young people are being deprived of opportunities to explore their talents and represent Wales on the world stage.

**237.** We heard that rural and lower socio-economic communities experience heightened barriers to accessing sport and cultural activities, exacerbating social inequalities. Additionally, the support and provisions for diverse communities has weakened, limiting inclusivity and social cohesion.

**238.** Sport and cultural participation should be accessible to all. Participation in these activities can support wider social goals, and nurture future talent. We believe that more can be done across government and local authorities to maximise the social impact of culture and sport. The recommendations in this report are intended to improve the financial sustainability of culture and sport, and in turn boost and broaden participation. This was also the aim of our previous inquiry into [Participation in sport in disadvantaged areas](#).

**239.** We are concerned that school swimming is at its worst position for over a generation due to reduced funding and increased costs. Given the importance of swimming as a life-skill, we believe that the Welsh Government should conduct an assessment of the state of school swimming, including availability of facilities and transport. It should then put in place a plan to improve this situation. We also note that travel infrastructure and costs, as well as location of facilities can present a barrier to participation in other sporting activities, not just swimming.

**Recommendation 9.** The Welsh Government should develop a school swimming strategy to ensure that children leaving primary school have the ability to swim. This strategy should recognise the importance of providing adequate facilities and transport.

**240.** We are also deeply concerned about the challenges facing the publishing industry in Wales and the implications publishing fewer books could have on Welsh learners and children's literacy skills. We urge the Minister to hold discussions with the Cabinet Secretary for Education and the Cabinet Secretary

for Finance and Welsh Language about how to ensure that the literacy of the people of Wales and the Welsh Government's ambition of a million Welsh speakers is not negatively affected by funding reductions.

**241.** The publishing sector makes a vital contribution to Wales's culture. We have seen a significant reduction in funding for the sector over the past decade, to the point that their ability to publish is under threat. Given that "A Wales of vibrant culture and thriving Welsh language" is one of the well-being goals of the Well-being of Future Generations (Wales) Act 2015, the importance of investing in Wales's culture cannot be underestimated. We therefore believe that the Welsh Government should urgently evaluate the appropriateness of its current investment in the sector.

**Recommendation 10.** The Welsh Government must respond to the concerns of the publishing sector and consider increasing its funding of the sector.

**Conclusion 3.** The Minister for Skills, Culture and Social Partnership should hold discussions with the Cabinet Secretary for Education and the Cabinet Secretary for Finance and Welsh Language about how the publishing sector can support improving the literacy of the people of Wales and the Welsh Government's ambition of a million Welsh speakers.



## 5. Welsh Government interventions

### Culture strategy

**242.** Over the summer, the Welsh Government consulted on its draft Culture Priorities, following a Programme for Government commitment to develop a new culture strategy. We provided a Committee response to this consultation.<sup>239</sup>

**243.** The Welsh Government's evidence paper explains that:

*"In response to the immediate budget reductions, we re-purposed £2m revenue funding, which was allocated to delivering the Culture Strategy in 2024- 25, to mitigate the impact of job losses at Amgueddfa Cymru, the National Library of Wales, the Arts Council of Wales and the wider arts sector."*<sup>240</sup>

**244.** Cyngor Gwynedd, while welcoming the priorities and aspirations in the draft Culture Priorities, called for adequate funding and effective collaboration to be attached to the strategy to enable the government, local authorities and the sector to be able to deliver on the priorities.<sup>241</sup>

**245.** ACW expressed disappointment that the Welsh Government has not published a strategy, but a set of principles instead. According to ACW the sector thought it was "slightly unambitious" but "reflective of the current economic climate."<sup>242</sup> Equity on the other hand described it as "not fit for purpose." They called for a:

*"a transformative Culture Strategy providing tangible financial support to struggling sectors and meaningful narrative for developing and sustaining the workforce."*<sup>243</sup>

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<sup>239</sup> [Letter to the Cabinet Secretary for Culture, Social Justice, Trefnydd and Chief Whip: Providing the Committee's response to the Welsh Government's consultation on Draft Priorities for Culture in Wales 2024 to 2030, 3 September 2024.](#)

<sup>240</sup> [Welsh Government, Written evidence, November 2024](#)

<sup>241</sup> [Written evidence, IFRCS 20, Cyngor Gwynedd](#)

<sup>242</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 283

<sup>243</sup> [Written evidence, IFRCS 03 Equity](#)

**246.** The Musicians' Union noted "significant concerns" about the draft strategy:

*"particularly it's lack of information and focus on professional performers and the workforce, and the timing, given that it is being consulted on a year after the ACW investment review while there is a crisis developing in Welsh music."*<sup>244</sup>

**247.** The Minister told us that the Culture strategy will be an "important vehicle" to ensuring "a vibrant and futureproofed sector in all the areas across arts, culture and sport".<sup>245</sup>

## Remit letters

**248.** Generally, Welsh Government funded bodies in the sport and culture sector are guided in their use of public funding by remit letters issued by the Welsh Government. These remit letters set out what the Welsh Government expects organisations to do with the funding it gives them.

**249.** We heard, for example from the Commission and Sport Wales, that the requirements in remit letters have increased or stayed the same as real-terms funding has decreased. ACW said that if it were to face an additional cut they would have to reconsider how much they can deliver and achieve in terms of the remit letter, and that they would need "honest and open discussions with the Government".<sup>246</sup> Similarly, Sport Wales said that certain deliverables required of them may not be possible.<sup>247</sup>

**250.** According to the Commission they are not funded adequately for the work that the Welsh Government expects them to undertake:

*"It needs to be emphasised that we have demanding KPIs from Welsh Government that relate to the climate emergency, community engagement, social justice, education, health and wellbeing, engaging with young people and more but our core funding is not sufficient to enable us to deliver any of these"*<sup>248</sup>

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<sup>244</sup> [Written evidence, IFRCS 44 The Musicians' Union](#)

<sup>245</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 23

<sup>246</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 173

<sup>247</sup> [Written evidence, IFRCS 41 Sport Wales](#)

<sup>248</sup> [Written evidence, IFRCS 40 RCAHMW](#)

**251.** The Commission called on the Welsh Government to “identify one organisation to lead on a particular delivery objective”, rather than giving all the sponsored bodies the same objectives.<sup>249</sup>

**252.** The Minister told us that there was a discussion with arm’s length bodies on the impact of funding reductions in relation to remit letters. He said:

*“In these discussions, we acknowledged the challenges being faced by these organisations and, subsequently, that more realistic objectives need to be set in relation to how they deliver against their Remit Letters going forward.”<sup>250</sup>*

### **Responsibility for funding national performing companies**

**253.** In Scotland, since 2007 national performing companies have been funded by the Government rather than the Arts Council. In Wales, national companies are funded by ACW and compete for funding in its investment reviews with other arts organisations of varying scales. The Musicians’ Union called on the Welsh Government to consider how cultural organisations are funded and managed, noting a current imbalance between nationally significant cultural organisations and others which are funded via an arms-length body.<sup>251</sup>

**254.** In response to whether national organisations should be directly funded by the Welsh Government instead, ACW said:

*“I think the argument that has been discussed in the past is that if the national companies are funded directly from Government, there is an additional strain of how do you make sure that you have a strategic arts policy across every element of the arts in Wales, and having the nationals and everyone else within the same strategy makes it clearer in terms of giving guidance, in terms of impact, in terms of reaching the audience you want to reach [...]*

*I think Scotland is not in a good place in terms of the arts currently. I think that there are strains there. Recently, the Scottish Government withdrew funding for individual artists. Creative Scotland then said, ‘Okay, we can’t fund them.’ The*

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<sup>249</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 221

<sup>250</sup> [Welsh Government. Actions and questions not reached](#)

<sup>251</sup> [Written evidence. IFRCs 44. The Musicians’ Union](#)

*Scottish Government then changed their mind. There's also been a promise in Scotland of an additional £100 million, I think, over the next five-year term, but my colleagues in Scotland say they've not seen any of that money. So, Scotland is probably not the best example to use at this point in time.*<sup>252</sup>

**255.** Organisations that took part in our engagement activities noted the impact of the cuts to ACW revenue funding on how it works with organisations and the limited support they are able to offer and advocate on their behalf, at a time when it is needed the most. Participants said:

*"We're seeing a lot less of them...About six, seven years ago, we used to discuss our work and work plans...That conversation was important to us, but it doesn't happen anymore."*

*"So much organisational knowledge has been lost... we did rely on those links and that championing from the Arts Council of Wales. There needs to be an acknowledgement that the Arts Council needs to be funded to be able to support us as well."*

**256.** Literature Wales expressed concern that ACW no longer has the capacity to be fully informed about the sector and as a result unable to advocate for it effectively. They said:

*"There is a sense within the arts sector that the Arts Council are under pressure, and should not be disturbed unless absolutely necessary. This is not a healthy relationship in the long term. We are still waiting for their over-due Strategic Plan to help guide us as a sector, and a sector-wide plan or guidance on advocating for the arts".*<sup>253</sup>

**257.** Mid Wales Opera, which had its funding cut by ACW, called on the Welsh Government "to conduct a thorough review of the governance and operations of ACW", stating that in their view:

*"their priorities completely ignore the perspective of actual and potential audiences, in favour of an emphasis on experimental*

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<sup>252</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraphs 276-277

<sup>253</sup> [Written evidence. IFRCS 31 Literature Wales](#)

*work which appeals only to a narrow elite of metropolitan arts professionals.*<sup>254</sup>

**258.** According to Ruthin Craft Centre, “ACW needs to take a radical look at the way it allocates its funding”. They believe that larger organisations such as WNO and the National Orchestra of Wales have more potential to raise fund to cover their own costs, which could “release more funding for ACW to look at a more balanced level of support across its portfolio”.<sup>255</sup>

**259.** ACW told us that they have “a very good relationship with the sector.” In response to the concerns raised by other stakeholders, they said:

*“...working together, we can improve. I’m sympathetic to it, but we need a sense of reality here in terms of what the cuts actually mean as well.”*<sup>256</sup>

**260.** Their written evidence states that they are listening to the sector to identify how they can support the sector more effectively:

*“We are reflecting and discussing internally/with our sector partners what the long-term needs of the sector are and how we can best respond/change our offer [...] We have commissioned an economic impact assessment of our work to help inform future funding considerations and strategy.”*<sup>257</sup>

**261.** This economic impact assessment was published in November 2024 and showed that in 2023/24, for every £1 of public funding received by ACW, £2.51 went back into the economy.<sup>258</sup>

**262.** The Minister told us that there are no plans to fund national arts companies directly and that ACW is “best placed” to distribute funding, working under the strategic framework set by the Welsh Government.<sup>259</sup>

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<sup>254</sup> [Written evidence, IFRCs 23 Mid Wales Opera](#)

<sup>255</sup> [Written evidence, IFRCs 10 Ruthin Craft Centre](#)

<sup>256</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 225

<sup>257</sup> [Written evidence, IFRCs 35 Arts Council of Wales](#)

<sup>258</sup> [Arts Council of Wales, Economic Impact Report, October 2024](#)

<sup>259</sup> [Welsh Government, Actions and questions not reached, 13 November 2024](#)

## Strategic support

**263.** The Musicians' Union<sup>260</sup> and Creu Cymru called for strategic support beyond funding from the Welsh Government. Creu Cymru said:

*"the Welsh Government could offer strategic assistance in areas like capital funding, sustainability, capacity building, digital transformation, and fostering collaborations across sectors."*<sup>261</sup>

**264.** Pedr ap Llwyd, former Chief Executive of the Library, also called for greater strategic support and for the Welsh Government to strengthen its relationship with the Library. He said:

*"I had only two meetings a year with the relevant minister, each lasting just thirty minutes, and throughout that time, our key Welsh Government official did not visit the Library once. This lack of meaningful engagement prevented a full understanding of the challenges the Library was facing, as well as the opportunities it was able to offer."*<sup>262</sup>

**265.** Cyngor Gwynedd called on the Welsh Government to facilitate better relationships between its funded bodies and local authorities and the wider sector.<sup>263</sup> Whereas ACW called for more partnership working within government "so that when we are discussing our potential budget, we look at our contribution across departments, rather than in just one single department".<sup>264</sup> Sport Wales also called for more support to work across government.<sup>265</sup>

**266.** Ruthin Craft Centre would welcome a better understanding by Welsh Ministers of the sector that they are in charge of:

*"what we would ask for – which is achievable – is for ministers to adopt a modest acceptance of their lack of in-depth knowledge and understanding and a willingness to listen to and take advice from specialists who have a deep*

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<sup>260</sup> [Written evidence, IFRCS 44, The Musicians' Union](#)

<sup>261</sup> [Written evidence, IFRCS 25, Creu Cymru](#)

<sup>262</sup> [Written evidence, IFRCS 14, Pedr ap Llwyd](#)

<sup>263</sup> [Written evidence, IFRCS 20, Cyngor Gwynedd](#)

<sup>264</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 267

<sup>265</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 120

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*understanding of the sector and from the arts bodies themselves.”<sup>266</sup>*

**267.** The Library<sup>267</sup> and the Commission<sup>268</sup> called for a Cabinet Secretary with responsibility for culture. ACW also said that it would welcome having a full Minister, saying that the status is important and that full Ministers are listened to more and carry more weight in the Cabinet.<sup>269</sup> Creu Cymru said that “it would be great if there was an arts Minister that was just looking at arts and that was it.”<sup>270</sup>

**268.** The Minister acknowledged that the Welsh Government needs to look at funding organisations better, but added that those organisations also need to look at “doing things differently”.<sup>271</sup>

## **National Contemporary Art Gallery**

**269.** The National Contemporary Art Gallery is the Welsh Government’s project to establish a network of galleries to share and exhibit contemporary art. We published a report on the project in December 2023, raising concerns about ongoing funding.<sup>272</sup> Correspondence from the Welsh Government in July 2024 said that ongoing revenue costs for the gallery from April 2025 onwards are £400,000, rising to £550,000 by year ten. The letter noted that:

*“The fundraising plan identifies potential sources of funding from a range of sources including £100,000 from Arts Council of Wales Lottery Funds and £100,000 from trusts and foundations with the remaining £200,000 to come from other public sources, as yet to be identified.”<sup>273</sup>*

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<sup>266</sup> [Written evidence, IFRCS 10 Ruthin Craft Centre](#)

<sup>267</sup> [Written evidence, IFRCS 52 National Library of Wales](#)

<sup>268</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 9 October 2024, [Record of Proceedings](#), paragraph 331

<sup>269</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 273

<sup>270</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 17 October 2024, [Record of Proceedings](#), paragraph 131

<sup>271</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 13 November 2024, [Record of Proceedings](#), paragraph 64

<sup>272</sup> [Culture, Communications, Welsh Language, Sport, and International Relations Committee, The National Contemporary Art Gallery for Wales, December 2023](#)

<sup>273</sup> [Letter from the Cabinet Secretary for Culture and Social Justice, Trefnydd and Chief Whip regarding the National Contemporary Art Gallery for Wales, 26 July 2024, Annex 1](#)

**270.** The Welsh Government’s initial feasibility study in 2018 forecast annual revenue costs for the dispersed network to be in the region of £2.7 million, or about five times as much. Correspondence from Amgueddfa Cymru said:

*“We have submitted a Business Case to Welsh Government which requests funding of £560k for 2025-27, to facilitate the ongoing delivery of the programme and to cover essential core costs relating to conservation, learning programmes, loans advice and support and technical support. These costs also include NCAGW staff at both Amgueddfa Cymru and the National Library. This is not something which has been factored within the Museum’s current Grant-in-Aid funding.”<sup>274</sup>*

**271.** The Library told us that the National Contemporary Art Gallery is a “topic of intense discussion at the moment” to see what elements can be continued without any additional funding for the continuation of the project, and what level of potential funding would be able to provide different levels of continuation of the project. They said that they are eager to continue to support the project “that widens access to collections for the people of Wales”.<sup>275</sup>

**272.** ACW told us that they cannot fund £400,000 for the National Art Gallery given the recent funding cuts.<sup>276</sup> They said that every partner around the board has been consistent in saying that continuity of sponsorship from the Welsh Government is needed for the project to continue.

**273.** The Minister said that:

*“Discussions are continuing with the project partners on the funding required and potential sources, to support both the transition from completion of the capital investment to delivery, and the future operating/running costs of the operating model. These discussions reflect the need for the partners to take on delivery of a new initiative, having recently absorbed reductions to grant in aid baselines.”*

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<sup>274</sup> [Letter from Amgueddfa Cymru providing written evidence in relation to the Committee’s inquiry into the impact of funding reductions for culture and sport, 18 October 2024](#)

<sup>275</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 119

<sup>276</sup> Culture, Communications, Welsh Language, Sport, and International Relations Committee, 26 September 2024, [Record of Proceedings](#), paragraph 290



**274.** He added that the future delivery model will seek to reduce reliance on funding from the Welsh Government and that it will be important for partners to secure external funding.<sup>277</sup>

## **Our view**

**275.** Welsh Government remit letters for its funded culture and sport organisations show a commendable level of ambition for what these organisations can deliver beyond their core purposes. They cover areas including healthcare, the Welsh language, climate action, education, tackling inequality, international diplomacy and economic regeneration. This range shows the contribution these sectors can make when they are well-funded. However, we do not believe that it is practical that the requirements from the Welsh Government have remained the same whilst the levels of funding they have provided have declined in real-terms. We also question the value of including broad aims within remit letters, rather than tangible, deliverable requirements.

**Recommendation 11.** The Welsh Government should review the remit letters of its funded organisations in light of their reduced real-terms funding.

Requirements in remit letters should be clear and tangible, and proportionate to the level of funding.

**276.** Some witnesses called for the Welsh Government to fund national arts organisations directly, rather than through the Arts Council. This is a complicated question, which deserves further, deeper analysis. There is an argument that the focus of politicians on the crisis facing the Welsh National Opera highlights the tension implicit in this body being funded by an independent charity: it is more common for nationally important institutions to be funded by a national government, which can be held to account in a national parliament. We believe that the question of who funds national companies is not a binary issue, with the answer being only the Arts Council or the Welsh Government. There is a possible third way which would involve core funding for these companies coming from the Arts Council with additional funding coming from the Welsh Government in recognition of the national and international significance of their work. Whilst not having a settled view on the most suitable funding arrangement, we think the matter deserves further analysis from the Welsh Government.

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<sup>277</sup>Welsh Government, Actions and questions not reached, 13 November 2024

**Recommendation 12.** The Welsh Government should analyse the most suitable model for funding national arts companies: whether this be from the Arts Council of Wales (as currently), the Welsh Government, or a combination of the two.

**277.** We are concerned by the lack of ambition and clarity around funding for the Welsh Government's National Contemporary Art Gallery project. Expecting external funding to cover the ongoing revenue costs of a Welsh Government project seems both optimistic and an abdication of responsibility. The aim of the project, to enable access to contemporary art across the nation, is laudable. But the lack of commitment from the Welsh Government means it is not meaningful to call the National Contemporary Arts Gallery a national institution. If the Welsh Government is sincere about taking the project forward, it should set out it intends to do that and how it will fund it.

**Recommendation 13.** The Welsh Government should set out how it intends to take forward the National Contemporary Art Gallery project, including how it will be funded.

## Annex 1: Culture funding for Wales compared to European countries.

This annex discusses the methods used to compare culture funding for a variety of countries using data from the Organisation for Economic Co-operation and Development (OECD), the Welsh Government Budget and data from the [State of the Arts](#) report. All of the data will be based from the year 2022, this is the most recent data that can be compared across countries.

### Definitions

This report will focus on two sections of funding, sports funding and culture funding. To ensure that we are comparing like for like this report will use the following definitions from the [Classification of the Functions of Government](#) (COFOG).

- [8.1: Recreational and sporting services](#)
  - o Provision of sporting and recreational services;
  - o Administration of sporting and recreational affairs;
  - o Supervision and regulation of sporting facilities;
  - o Operation or support of facilities for active sporting pursuits or events (playing fields, tennis courts, squash courts, running tracks, golf courses, boxing rings, skating rinks, gymnasia, etc.);
  - o Operation or support of facilities for passive sporting pursuits or events (chiefly specially equipped venues for playing cards, board games, etc.);
  - o Operation or support of facilities for recreational pursuits (parks, beaches, camping grounds and associated lodging places furnished on a non-commercial basis, swimming pools, public baths for washing, etc.);
  - o Grants, loans or subsidies to support teams or individual competitors or players. Includes: facilities for spectator accommodation; national, regional or local team representation in sporting events. Excludes: zoological or botanical gardens, aquaria, arboreta and similar institutions (08.2.0);
  - o Sporting and recreational facilities associated with educational institutions (classified to the appropriate class of Division 09).
- [8.2: Cultural services](#)
  - o Provision of cultural services;
  - o Administration of cultural affairs;

- Supervision and regulation of cultural facilities;
- Operation or support of facilities for cultural pursuits (libraries, museums, art galleries, theatres, exhibition halls, monuments, historic houses and sites, zoological and botanical gardens, aquaria, arboreta, etc.);
- Production, operation or support of cultural events (concerts, stage and film productions, art shows, etc.);
- Grants, loans or subsidies to support individual artists, writers, designers, composers and others working in the arts or to organizations engaged in promoting cultural activities. Includes: national, regional or local celebrations provided they are not intended chiefly to attract tourists. Excludes: cultural events intended for presentation beyond national boundaries (01.1.3);
- National, regional or local celebrations intended chiefly to attract tourists (04.7.3);
- Production of cultural material intended for distribution by broadcasting (08.3.0).

Total government expenditure for each COFOG section has been used in the statistics in this document. Total government expenditure has the following components:

- Central government expenditure: All government units that extend over the entire country.
- State government expenditure: Government units that control state areas which a country is divided into.
- Local government expenditure: Local government provides a wide range of services to local residents.

## **Methodology and caveats**

The methodology for the statistics in this document is similar methodology used in the State of the Arts report produced by Campaign for the Arts and the University of Warwick. Note the graphs below are based on spending per person in £, similar graphs can be seen in the State of the Arts report (Figure 3), note the graphs in the State of the Arts report are in \$ per person.

The data for other countries comes from the OECD Annual government expenditure by function (COFOG) table where expenditure for recreational and sporting services and cultural services were focused on. This data appears to be accurate as, where applicable, it matches Eurostat data (UK not included). Further information on methodological aspects can be found in the Guide to Eurostat

[culture statistics](#). The calculations used in this document can be found [on the OECD Data Explorer](#).

As a caveat to this report, countries report figures in different ways and therefore some spending may not be included in the reported figures below that may be relevant to the calculations. Whilst the OECD and Eurostat are reputable sources there is provisional data present in the dataset and the data may be revised. The data in this report was accessed on the 27<sup>th</sup> November 2024.

## Data for Wales

[Local government expenditure](#) for 2022 can be found on StatsWales. Using the definitions above the categories of “Recreation and sport” and “Open spaces” fall under COFOG 8.1 and “Cultural and heritage services” and “Library services” fall under COFOG 8.2 for Local Government spending.

<b>Local Government, £000</b>	<b>COFOG 8.1</b>		<b>COFOG 8.2</b>
<b>Recreation and sport</b>	84,999	Cultural and heritage services	36,222
<b>Open spaces</b>	70,717	Library services	41,758
<b>Total</b>	<b>155,716</b>	<b>Total</b>	<b>77,980</b>

**Table 1:** [Local government spending for COFOG 8.1 and 8.2](#).

The Welsh budget would fall under Central Government funding and therefore data can be used from the [2nd supplementary budget for 2022-23](#). Using the definitions above the categories of “Sports and Physical Activity” in the Economy main expenditure group fall under COFOG 8.1 and “Support for Culture and the Arts” and “Support the Historic Environment” in the Economy main expenditure group fall under COFOG 8.2.

<b>Budget, £000</b>		<b>COFOG 8.1</b>		<b>COFOG 8.2</b>
<b>Resource</b>	Sports and physical activity	23,113	Support for Culture and the Arts	88,240
			Support the Historic Environment	16,364
<b>Capital</b>	Sports and physical activity	8,314	Support for Culture and the Arts	24,100
			Support the Historic Environment	11,550
	<b>Total</b>	<b>31,427</b>	<b>Total</b>	<b>140,254</b>

**Table 2: Welsh Government *2nd supplementary budget* figures for COFOG 8.1 and 8.2.**

<b>Wales 2022 data</b>	<b>Local government expenditure, £m</b>	<b>Central government expenditure, £m</b>	<b>Total government expenditure, £m</b>
<b>8.1: Recreational and Sports Services</b>	155.72	31.43	187.14
<b>8.2: Cultural Services</b>	77.98	140.25	218.23

**Table 3.1: Summary of Welsh data for COFOG 8.1 and 8.2.**

<b>Wales 2022 data</b>	<b>£ spending per person</b>
<b>8.1: Recreational and Sports Services</b>	59.75
<b>8.2: Cultural Services</b>	69.68

**Table 3.2: Spending per person in £**

COFOG 8.1 spending for Wales equates to £59.75 per person and COFOG 8.2 spending for Wales equates to £69.68 per person. Population data can be found [here](#).

## Data for UK and other European countries

Data can be found [here](#) for COFOG 8.1 and COFOG 8.2 and is broken down by various European countries and areas. [Population data](#) for the countries can be found in the excel sheet. Using this data and the conversion to GBP gives the numbers below. This is a similar comparison that has been used in the [State of the Arts](#) report. Note: Some of the numbers are different to the State of the Arts reports, this could be due to rounded population values and/or rounded currency conversion.

<b>Country/Area</b>	<b>£ spending per person</b>
<b>Latvia</b>	46.78
<b>Poland</b>	54.97
<b>Wales</b>	59.75
<b>Lithuania</b>	63.91
<b>United Kingdom</b>	66.18
<b>Ireland</b>	67.49
<b>Italy</b>	75.32
<b>Greece</b>	86.68
<b>Slovenia</b>	91.09
<b>Germany*</b>	101.60
<b>Czechia</b>	107.50
<b>Spain*</b>	107.86
<b>Estonia</b>	123.86
<b>Hungary</b>	126.74
<b>Austria</b>	128.81
<b>Belgium*</b>	159.36
<b>Denmark</b>	171.26
<b>France*</b>	189.93
<b>Finland</b>	200.61
<b>Netherlands</b>	237.56
<b>Switzerland</b>	260.31

<b>Country/Area</b>	<b>£ spending per person</b>
<b>Sweden</b>	285.88
<b>Norway</b>	290.22
<b>Luxembourg</b>	483.46
<b>Iceland</b>	978.51

**Table 4: £ spending per person for COFOG 8.2 Cultural Services for selected European countries**



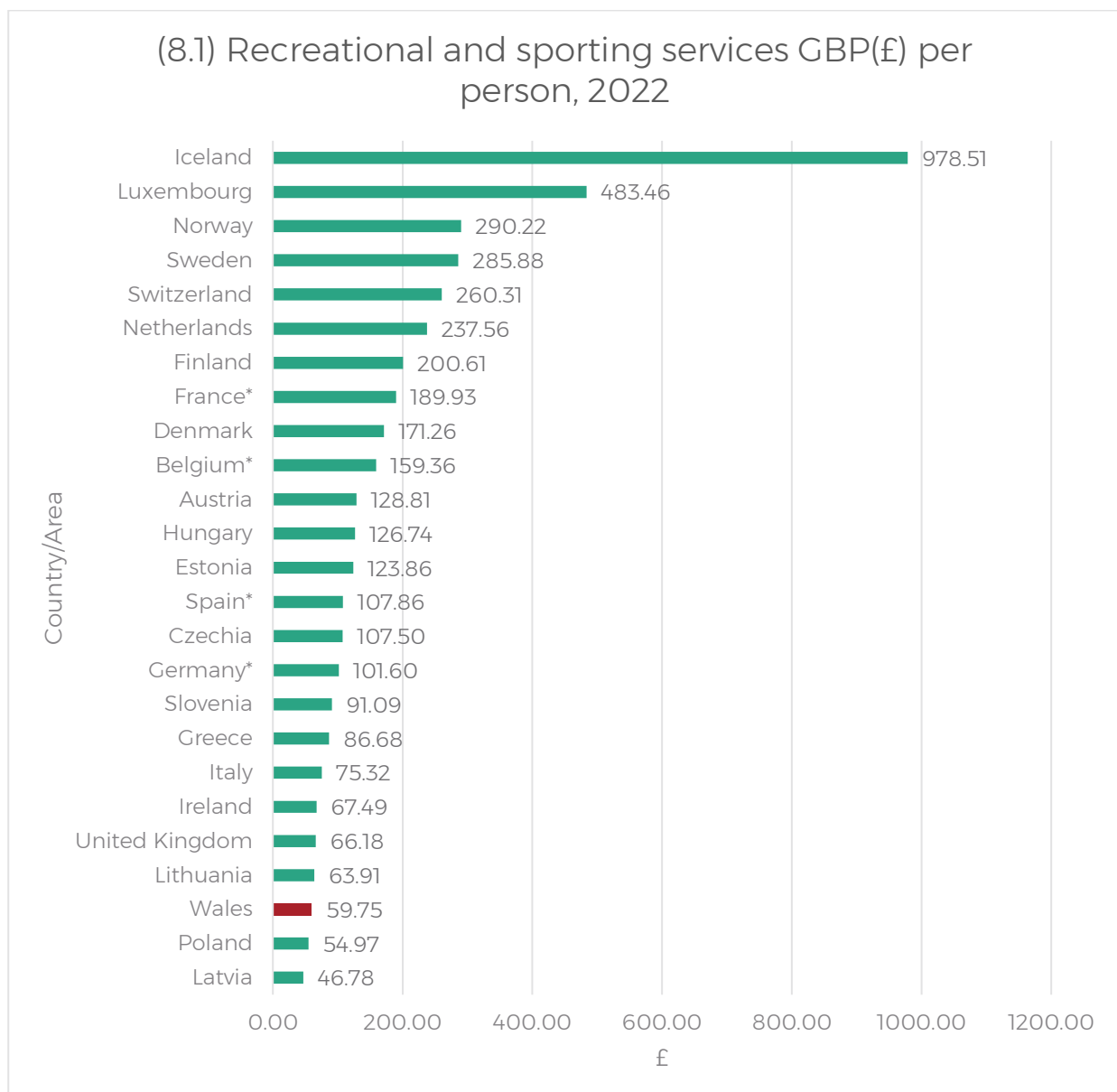
<b>Country/Area</b>	<b>£ spending per person</b>
<b>Greece</b>	26.29
<b>Wales</b>	69.68
<b>Poland</b>	80.98
<b>Italy</b>	82.83
<b>United Kingdom</b>	91.12
<b>Spain*</b>	113.36
<b>Czechia</b>	138.08
<b>Ireland</b>	149.97
<b>Lithuania</b>	150.72
<b>Germany*</b>	154.85
<b>Latvia</b>	156.32
<b>Slovenia</b>	158.51
<b>Hungary</b>	162.16
<b>Finland</b>	205.79
<b>Austria</b>	207.32
<b>Belgium*</b>	209.98
<b>Estonia</b>	210.86
<b>Netherlands</b>	223.88
<b>Sweden</b>	236.01
<b>France*</b>	237.61
<b>Denmark</b>	285.08
<b>Switzerland</b>	296.94
<b>Norway</b>	389.23
<b>Luxembourg</b>	500.90
<b>Iceland</b>	691.60

**Table 5: £ spending per person for COFOG 8.2 Cultural Services for selected European countries**

## How does Wales compare?

### COFOG 8.1: Recreational and sporting services

Wales ranks third bottom of the countries looked at in terms of recreational and sporting services funding and has a similar amount of funding as Poland and Lithuania. Wales ranks below the UK in terms of funding, Wales has £59.75 of funding per person for recreational and sporting services compared to the UK's £66.18 of funding per person.

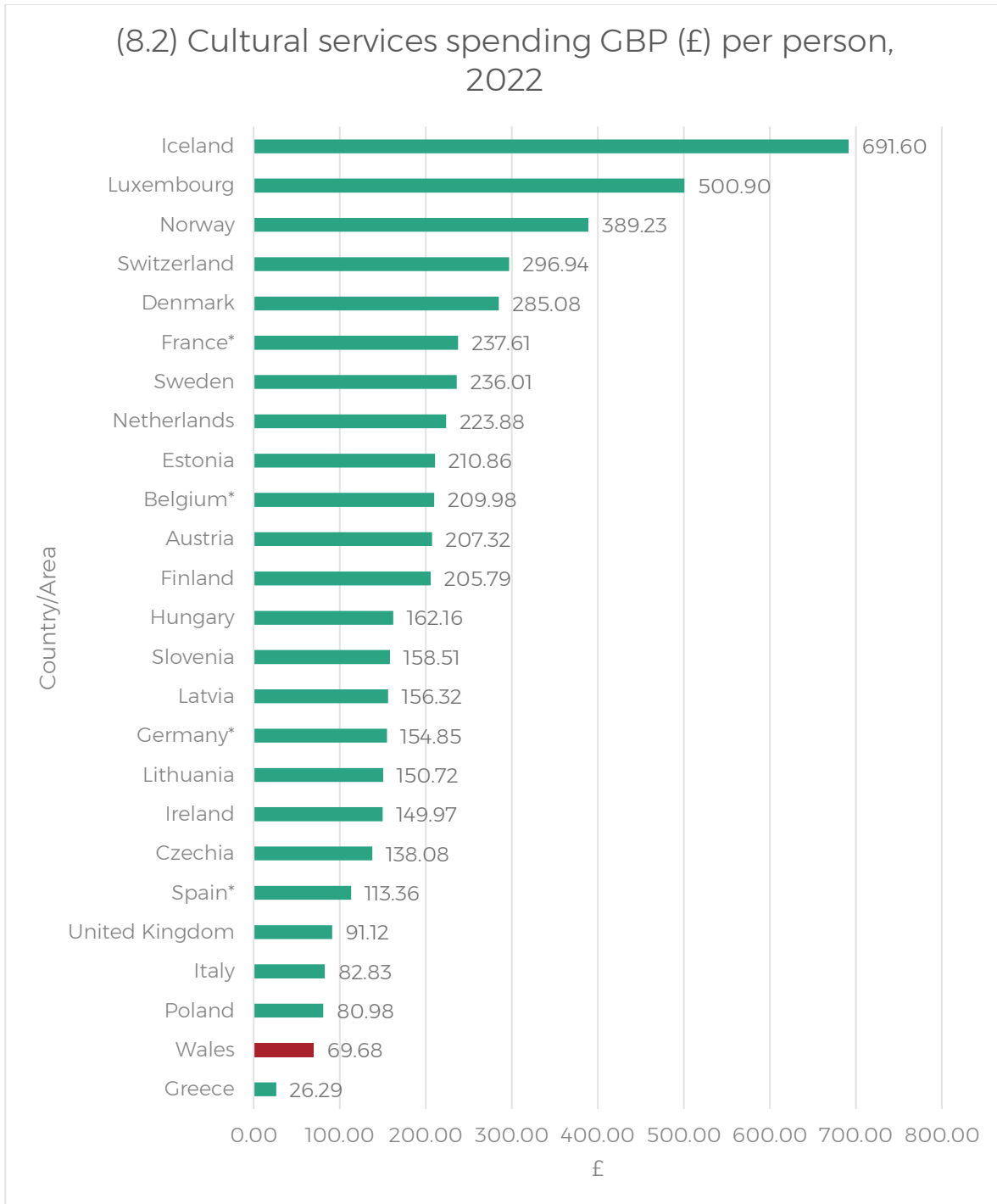


**\*provisional data**

**Figure 1: European countries COFOG 8.1 Recreational and sporting services spending per person in GBP in 2022.**

**COFOG 8.2 Cultural services**

Wales ranks second from bottom in terms of cultural services spending per person, ranking below all selected countries other than Greece. Wales has £69.68 spending per person for cultural services compared to the UK’s £91.12 spending per person.



**\*provisional data**

**Figure 2: European countries COFOG 8.2 Cultural services spending per person in GBP in 2022**

## Annex 2: List of oral evidence sessions.

The following witnesses provided oral evidence to the committee on the dates noted below. Transcripts of all oral evidence sessions can be viewed on the [Committee's website](#).

Date	Name and Organisation
<b>26 September 2024</b>	<b>Adele Thomas,</b> Welsh National Opera <b>Ashok Ahir,</b> National Library of Wales <b>Christopher Barron,</b> Welsh National Opera <b>Dafydd Rhys,</b> Arts Council of Wales <b>Rhodri Llwyd Morgan,</b> National Library of Wales
<b>09 October 2024</b>	<b>Baroness Tanni Grey-Thompson,</b> Sport Wales <b>Brian Davies,</b> Sport Wales <b>Christopher Catling,</b> Royal Commission on the Ancient and Historical Monuments of Wales <b>Hayley Roberts,</b> Royal Commission on the Ancient and Historical Monuments of Wales
<b>17 October 2024</b>	<b>Hannah Firth,</b> Chapter Arts Centre <b>Helgard Krause,</b> Welsh Books Council <b>Louise Miles-Payne,</b> Creu Cymru <b>Naomi Chiffi,</b> National Theatre Wales

<b>Date</b>	<b>Name and Organisation</b>
	<p><b>Sharon Stone,</b> Chapter Arts Centre</p>
<p><b>24 October 2024</b></p>	<p><b>Amanda Davies,</b> Byw'n Iach</p> <p><b>Andrew Howard,</b> Welsh Sports Association</p> <p><b>Emily Owen,</b> Conwy County Borough Council</p> <p><b>Fergus Feeney,</b> Swim Wales</p> <p><b>Huw Thomas,</b> Welsh Local Government Association</p> <p><b>Roland Evans,</b> Cyngor Gwynedd</p> <p><b>Sarah Ecob,</b> Conwy County Borough Council</p> <p><b>Vicki Sutton,</b> Netball Wales</p>
<p><b>13 November 2024</b></p>	<p><b>Jack Sargeant MS,</b> Minister for Culture, Skills and Social Partnership</p> <p><b>Paul Kindred,</b> Welsh Government</p> <p><b>Ruth Meadows,</b> Welsh Government</p> <p><b>Steffan Roberts,</b> Welsh Government</p>

## Annex 3: List of written evidence

The following people and organisations provided written evidence to the Committee. All Consultation responses and additional written information can be viewed on the [Committee's website](#).

Reference	Organisation
<b>IFRCS 01</b>	Rhyl and District Hockey Club
<b>IFRCS 02</b>	Welsh Gymnastics
<b>IFRCS 03</b>	Equity
<b>IFRCS 03a</b>	Equity – Supporting Manifesto
<b>IFRCS 04</b>	Cardiff Met Uni – School of Art & Design
<b>IFRCS 05</b>	Cardiff Met Uni – School of Sport and Health Sciences
<b>IFRCS 06</b>	Steffan Jones-Hughes
<b>IFRCS 07</b>	Squash Wales
<b>IFRCS 08</b>	Meg Ryder
<b>IFRCS 09</b>	Timothy Payne
<b>IFRCS 10</b>	Ruthin Craft Centre
<b>IFRCS 11</b>	Individual 01
<b>IFRCS 12</b>	Gowerton Hockey Club
<b>IFRCS 13</b>	Wyeside Arts Centre
<b>IFRCS 14</b>	Pedr ap Llwyd
<b>IFRCS 15</b>	Sofia Lazaridi
<b>IFRCS 16</b>	Carmarthen Athletic Hockey Club
<b>IFRCS 17</b>	Isle of Anglesey County Council
<b>IFRCS 18</b>	Making Music
<b>IFRCS 19</b>	Merthyr Tydfil Museums Service
<b>IFRCS 20</b>	Cyngor Gwynedd

<b>Reference</b>	<b>Organisation</b>
<b>IFRCS 21</b>	Chapter Cardiff Ltd
<b>IFRCS 22</b>	Individual 02
<b>IFRCS 23</b>	Mid WalesOpera
<b>IFRCS 24</b>	Professor Frank Banks
<b>IFRCS 25</b>	Creu Cymru
<b>IFRCS 26</b>	Conwy County Borough Council
<b>IFRCS 27</b>	Northhop Hall Ladies Hockey Club
<b>IFRCS 28</b>	WCVA (Wales Council for Voluntary Action)
<b>IFRCS 29</b>	Music Venue Trust
<b>IFRCS 30</b>	Beicio Cymru
<b>IFRCS 31</b>	Literature Wales
<b>IFRCS 32</b>	Community Leisure UK
<b>IFRCS 33</b>	Film Hub Wales
<b>IFRCS 34</b>	Weightlifting Wales
<b>IFRCS 35</b>	Arts Council of Wales
<b>IFRCS 36</b>	Cardiff University, Centre for the Creative Economy
<b>IFRCS 37</b>	Swim Wales
<b>IFRCS 38</b>	Gwent Hockey Club
<b>IFRCS 39</b>	Cardiff and Met Hockey Club
<b>IFRCS 40</b>	RCAHMW
<b>IFRCS 41</b>	Sport Wales
<b>IFRCS 41a</b>	Sport Wales - Appendix
<b>IFRCS 42</b>	Federation of Museums and Galleries of Wales
<b>IFRCS 43</b>	LTA & Tennis Wales
<b>IFRCS 44</b>	The Musicians' Union
<b>IFRCS 45</b>	Football Association of Wales
<b>IFRCS 46</b>	Welsh Sports Association
<b>IFRCS 47</b>	Welsh Athletics
<b>IFRCS 48</b>	StreetGames

<b>Reference</b>	<b>Organisation</b>
<b>IFRCS 49</b>	Disability Sport Wales
<b>IFRCS 50</b>	TAC
<b>IFRCS 51</b>	Wales Hockey
<b>IFRCS 52</b>	National Library of Wales
<b>IFRCS 53</b>	The National Lottery Heritage Fund
<b>IFCRS 54</b>	Huw Milward, Game Developer and Dim Parcio band