

Welsh Parliament

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

Behind the scenes

The creative industries workforce

October 2023



The Welsh Parliament is the democratically elected body that represents the interests of Wales and its people. Commonly known as the Senedd, it makes laws for Wales, agrees Welsh taxes and holds the Welsh Government to account.

An electronic copy of this document can be found on the Welsh Parliament website: www.senedd.wales/SeneddCulture

Copies of this document can also be obtained in accessible formats including Braille, large print, audio or hard copy from:

**Culture, Communications, Welsh Language, Sport,
and International Relations Committee
Welsh Parliament
Cardiff Bay
CF99 1SN**

Tel: **0300 200 6565**

Email: **SeneddCulture@senedd.wales**

Twitter: **[@SeneddCultureIR](https://twitter.com/SeneddCultureIR)**

© **Senedd Commission Copyright 2023**

The text of this document may be reproduced free of charge in any format or medium providing that it is reproduced accurately and not used in a misleading or derogatory context. The material must be acknowledged as copyright of the Senedd Commission and the title of the document specified.

Welsh Parliament

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

Behind the scenes

The creative industries workforce

October 2023



About the Committee

The Committee was established on 23 June 2021. Its remit can be found at:
www.senedd.wales/SeneddCulture

Current Committee membership:



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



Hefin David MS
Welsh Labour



Alun Davies MS
Welsh Labour



Llyr Gruffydd MS
Plaid Cymru



Tom Giffard MS
Welsh Conservatives



Carolyn Thomas MS
Welsh Labour

The following Member attended as a substitute during this inquiry:



Vikki Howells MS
Welsh Labour

The following Member was also a member of the Committee during this inquiry:



Heledd Fychan MS
Plaid Cymru

Contents

Chair’s foreword	5
Recommendations	7
1. Introduction	9
Background.....	9
Terms of reference	11
Evidence gathering	11
2. Health of the workforce	13
Covid-19 pandemic	13
Booming screen industries.....	15
Low attendances and funding issues	16
Welsh language	19
Our view.....	20
3. Pay and working conditions	23
Pay.....	23
Working conditions.....	24
Bullying and problematic behaviour.....	25
Mental health	26
Our view.....	28
4. Equality, diversity and inclusion	31
Limited data	33
Our View.....	35

5. Skills and training	37
Longer term planning for skills	38
Training for arts and music sectors	39
Resourcing skills development	40
Apprenticeships	41
Career opportunities	42
Our View	44
6. Broader support for the creative industries	47
Our View	49
Annex 1: List of oral evidence sessions.....	52
Annex 2: List of written evidence.....	54

Chair's foreword

Wales has established itself as leading centre for the creative industries in the United Kingdom. The sector provides over 80,000 jobs and has an annual turnover of about £4 billion. It truly is one of the powerhouses of the Welsh economy and is an achievement we should all be proud of. Despite the boom in the industry in Wales, it has become obvious that the creative industries is really a tale of two creative industries.

The first part of the creative industries is a real success story. The screen sector in Wales, both before and after the Covid-19 pandemic, has grown significantly. The sector was able to respond quickly following the initial lockdown and is busier now than ever. This provides plenty of work opportunities for those who wish to work in the screen sector.

On the other hand, the other part of the creative industries is struggling. The arts, culture and music sectors have not fully recovered since the pandemic. This recovery has been hampered by rocketing energy costs and a slow return of audiences (compared to pre-pandemic levels). Unfortunately, the additional support provided by the Welsh Government to these sectors, while welcomed, has been eaten up by record levels of inflation.

But this doesn't have to be the case.

The Welsh Government has played an important role in the growth of the creative industries. It has taken important steps to introduce fair pay and working condition practices in projects it funds. It has introduced well-being facilitators to work on productions which help provide support to workers with their mental health. It has also put in place a skills plan to address gaps within the different sectors. All these actions are to be applauded and welcomed. However, this should not be the ceiling of the Welsh Government's support and ambition for the creative industries.

In our report, we set out a number of recommendations that we think will help ensure that the creative industries continues to grow in a fair and sustainable way.

During the inquiry, we unfortunately heard that bullying and inappropriate behaviour is endemic in the screen sector, including in Wales. It is unacceptable in this day and age that anyone should be subject to such behaviours in their workplace. We are determined to ensure that all those who participate and work within the creative industries in Wales can do so without fear of prejudice, bullying or discrimination. As such we are calling on the Welsh Government to work with unions and industry to further identify what else it can do to build on the positive interventions it has made to date.

We also heard that skills planning and development is often “short-termist”. Whilst the Welsh Government’s two year funding commitment to the Creative Skills Fund is to be welcomed, we believe that this provides a foundation that needs to be built upon. A longer-term approach would greatly enhance the talent pipeline for the creative industries in Wales, helping with the sector’s growth over the coming years.

Challenges also remain in ensuring that there is good quality data to understand equality, diversity and inclusion within the creative industries. Although there has been some improvement in recent years, much of the available data is either outdated or not specific to Wales. Better, more reliable data will help the Welsh Government determine where to target its resources to support the creative industries in this regard.

The American poet and civil rights activist, Maya Angelou, once said that:

“You can’t use up creativity...The more you use, the more you have.”

This is how we see the future of the creative industries in Wales. With the right interventions, we hope to see more workers participate in all sectors of the creative industries, leading to its continued growth. A growth that is sustainable, and fair to all those who choose to work in the creative industries.



Delyth Jewell MS

Committee Chair

Recommendations

Recommendation 1. The Welsh Government should ensure that the forthcoming Culture Strategy sets out support for developing and sustaining the workforce in the arts and music sectors..... Page 21

Recommendation 2. The Welsh Government should outline how it is coordinating initiatives to ensure there are sufficient Welsh language skills available in the creative industries. If no specific plans are currently in place, the Welsh Government should work with partners who require Welsh language skills to develop and implement a scheme to increase the Welsh language workforce in the creative industries..... Page 22

Recommendation 3. The Welsh Government, in partnership with trade unions and production companies, should identify best practice to ensure that workers can work in an environment free of discrimination, bullying and prejudice. The Welsh Government should report back to the Committee within six months on its progress with this recommendation..... Page 29

Recommendation 4. The Welsh Government and the Arts Council of Wales should review what additional resource is required by the arts, culture and music sectors to achieve equitable pay settlements and outline what additional support they can provide. This work should be completed in time for the next financial year.....Page 30

Recommendation 5. The Welsh Government should include provisions on fair pay and working conditions and the use of well-being facilitators in the forthcoming Culture Strategy.....Page 30

Recommendation 6. The Welsh Government should mainstream contractual clauses on equality, diversity and inclusion within production funding agreements to improve equality, diversity and inclusion. The use of these should also be stipulated within the forthcoming Culture Strategy, and used wherever possible..... Page 35

Recommendation 7. The Welsh Government should work with the Arts Council of Wales and the academic partners to outline how it can improve data

collection on equality, diversity and inclusion. The Welsh Government should report back to the Committee within three months on how it intends to achieve this.....Page 36

Recommendation 8. We recommend that the Welsh Government increases the funding available through the Creative Skills Fund and works with industry to identify future skills gaps.Page 45

Recommendation 9. The Welsh Government should provide longer term (beyond 2024) funded support for skills development in the creative industries.Page 45

Recommendation 10. The Welsh Government should undertake joint-working with schools, education providers and the creative industries to ensure that young people are aware of the range of career opportunities, and have the required skills, to work in the creative industries. The Welsh Government should report back to the Committee by the end of March 2024 with an outline of how it will do this..... Page 46

Recommendation 11. The Welsh Government should urgently undertake an assessment of the financial health of arts venues in Wales in collaboration with the Arts Council of Wales, the Music Venues Trust and other suitable organisations. This assessment should be completed before the next financial year in order to allow for any further support to be provided if required.Page 50

Recommendation 12. The Welsh Government should urgently undertake an assessment of the health of the cinema sector in collaboration with Ffilm Cymru. This assessment should be completed before the next financial year in order to allow for any further support to be provided if required. Page 51

Recommendation 13. The Welsh Government should review the outcomes of the Irish Government’s Basic Income for the Arts pilot at the appropriate time. Page 51

1. Introduction

Background

1. In recent years, the creative industries has been one of Wales's best-performing sectors. Film and television production has been a particularly high-growth area. Between 2017 and 2021, turnover in the screen industries grew by 72 per cent to £575m.¹
2. Key facts² about the creative industries in Wales in 2019 include:
 - 8,600 enterprises³ are active in Wales's creative industries in 2019. This represents an 8 per cent increase compared to 2017;
 - 84,500 people are working in the creative industries in Wales (as employees and freelancers), an increase of about 5.6 per cent compared to 2017;
 - 500 new enterprises enter the creative industries in Wales every year;
 - 99 per cent of companies in the creative industries in Wales are small, employing less than 50 people.
 - The estimated total turnover of Wales' creative industries is £4bn in 2019, which is 5 per cent of the total GDP in Wales. Around 58 per cent of this is concentrated in the Cardiff Capital Region.⁴
3. Although film and television production has been a particularly high-growth area in recent years, concerns were raised about a potential skills shortage limiting growth in the screen industries back in 2018⁵. These concerns were

¹ Welsh Government: [Ad-hoc statistical requests: 25 April to 6 May 2022](#) – 2 October 2023

² This data is based on the creative industries being categorised in nine main sectors: advertising and marketing; architecture; crafts; design and designer fashion; film, TV, video, radio and photography; IT, software and computer services; publishing; museums, galleries and libraries; and music, performing and visual arts

³ Enterprises are defined as projects, businesses or companies.

⁴ Clwstwr: [Report update: The size and composition of the Creative Industries in Wales in 2019](#) – January 2021

⁵ Culture, Welsh Language and Communications Committee – Fifth Senedd report: [Inquiry into film and major television productions in Wales](#) – May 2019 [PDF 671KB]

reiterated in the 2021 Screen Survey Wales report by the University of South Wales, and Creative Wales (the Welsh Government’s creative industries division).⁶ In September 2021, the Welsh Government announced that, “...a new creative skills body will be delivered internally through Creative Wales”.⁷ Since then, the Welsh economy has been subject to the shocks of Brexit, Covid-19 and the cost of living crisis.⁸

4. Headline statistics for the creative industries more generally can sometimes obscure the difficulties faced by sub-sectors, notably live music and theatre. For example, the Music Venues Trust has previously said:

“Recovery within the live music industry post pandemic has been sluggish. Reduction in activity and venue closure will continue and multiply this cycle of resource loss.”⁹

5. On 15 November 2022, the Welsh Government confirmed it is developing a Culture Strategy for Wales¹⁰. The scope of the strategy will include arts, museums, libraries, archives, and the historic environment, and it will look at how the Welsh Government can best support and develop these sectors. The Welsh Government intends for the Strategy to be developed by the end of 2023¹¹.

6. A number of respondents to our consultation on Priorities for the Sixth Senedd¹² (carried out during summer 2021) called for the Committee to look at the creative industries workforce, including the Creative Economy Unit at Cardiff University, the Arts Council of Wales, National Youth Arts Wales, and the Future Generations’ Commissioner.

⁶ University of South Wales and Creative Wales: [Screen Survey Wales 2021](#) [PDF 31.3MB]

⁷ Welsh Government: [Written Statement: A new Creative Skills Body for Wales](#) – 16 September 2021

⁸ Senedd Research: [Film and major television production: is the Welsh Government doing enough to grow the domestic screen industry?](#) – 27 May 2021

⁹ Committee consultation: [CIWF05 Music Venue Trust](#) – September 2022 [PDF 381KB]

¹⁰ Welsh Government: [Written Statement: Developing a Culture Strategy for Wales](#) – 15 November 2022

¹¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 18 January 2023, paragraph 49

¹² Committee consultation: [Culture, Communications, Welsh Language, Sport and International Relations: Priorities for the Sixth Senedd](#)

7. Finally, the Covid-19 pandemic disproportionately affected freelancers, who make up an estimated half of the cultural sector workforce in Wales¹³. A report published in January 2022 by industry body, Cultural Freelancers Wales, has a number of startling conclusions. These include that almost a quarter of freelancers were still uncertain about whether they will stay in or leave the industry.¹⁴

Terms of reference

8. The terms of reference for the inquiry were published on 19 July 2022. We asked stakeholders:

- What is the current health of the sector's workforce, including the impacts of the pandemic, Brexit, and cost of living crises? Have workers left the sector, and what impact has this had?
- How financially stable is the sector, and how suitable are pay and working conditions?
- How equal, diverse and inclusive is the sector? How can this be improved?
- How sufficient are skills and training opportunities? Are there gaps, and how should they be filled?
- What has been the impact of support from public bodies such as the Welsh Government, and is further support needed?

Evidence gathering

9. We ran a public consultation from 19 July 2022 to 30 September 2022. We received 19 written responses representing a range of voices within the creative industries. We also held six oral evidence sessions between 26 October 2022 and 25 May 2023. An outline of those who participated can be found in Annex 1 and 2 of this report.

¹³ Cultural Freelancers Wales: [Road to Recovery?](#) - January 2022

¹⁴ Cultural Freelancers Wales: [Road to Recovery?](#) - January 2022

10. In addition to written and oral evidence, we undertook a wide variety of engagement with stakeholders. These include a visit to the new BBC Cymru Wales Headquarters in Central Square, Cardiff on 19 October 2022. The Senedd Commission’s Citizen Engagement Team facilitated interviews on our behalf with workers in the creative industries sector (“the Interviews”).¹⁵ And finally, on 10 November 2022, we participated in a workshop with academics and workers in the sector, kindly hosted by the University of South Wales (“the Workshop”).¹⁶ The professions represented at both exercises included animators, videographers, video game producers, costume designers, light and sound professionals, musicians and scriptwriters.

11. We would like to thank every person and organisation who took the time to contribute to this inquiry.

¹⁵ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

¹⁶ [Creative industries workforce: Workshop](#) - January 2023 [PDF 172KB]

2. Health of the workforce

Covid-19 pandemic

12. Evidence we considered shows that the Covid-19 pandemic disproportionately affected freelancers, who make up half the cultural sector workforce in Wales. A report by Cultural Freelancers Wales in 2022 found that:

- 92 per cent of freelancers indicated that their work has been negatively impacted by Covid-19, with half losing 80 per cent of their work in 2021.
- On average, freelancers lost 76 per cent of their income in 2020. The loss of income in 2021 shows only a small improvement, with a loss of 59 per cent of income.
- 45 per cent of lost income was due to cancellations, and 37 per cent was due to a reduction or curtailment of offers of work and available opportunities.
- 57 per cent of freelancers stopped investing in new equipment, material, products, education, training, etc.
- Although there was an improvement in perception of future prospects between 2020 and 2021, almost a quarter of freelancers are still uncertain about whether they will stay in or leave the industry.¹⁷

13. During the inquiry it became clear that the recovery from the pandemic had differed between sectors of the creative industries. Professor Justin Lewis (Cardiff University) told us:

"It's a mixed picture across the creative industries ... I think, in film and TV, we've seen expansion, and great expansion in Wales. Wales is a huge success story in that sector, and really going from strength to strength and is becoming now, I think, seen as a kind of global powerhouse in the UK... The music industry is very different— all the

¹⁷ Cultural Freelancers Wales: [Road to Recovery?](#) – January 2022

underlying trends in the music industry are bad. The shift towards streaming services has taken a huge amount of money out of the music industry. COVID was obviously a massive blow as well. So, I think the music industry is struggling and will continue to struggle until we find other economic models to support the music industry.”¹⁸

14. Tom Ware (University of South Wales) concurred by noting that the music sector had been hard hit by the pandemic, and that it would take longer to recover.¹⁹

15. The Musicians’ Union told us of a survey done by Help Musicians UK which showed that:

- Nearly half of musicians were either very or extremely concerned that they will be forced to leave the industry.
- 60 per cent of musicians are worse off now compared to where they were last year.
- 78 per cent of musicians were earning less than they were before the pandemic and 98 per cent are concerned about their ability to earn enough income.²⁰

16. BECTU said that the pandemic highlighted the precarious nature of freelance work. They said that, at the start of the pandemic, the sector closed which led to contract terminations. This resulted in income stopping for thousands of workers. BECTU added that “a lot of people understandably resented that”.²¹

¹⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 23-24

¹⁹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 22

²⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 15

²¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 23

Booming screen industries

17. Some parts of the creative industries thrived during the Covid-19 pandemic. Wales Interactive (a computer games publisher and developer) told us that the pandemic had been beneficial for the gaming sector. This was due to people being at home playing games. We heard that the industry grew during the pandemic; a trend which has continued.²²

18. The screen sector also recovered quickly following initial delays caused by lockdown. Ffilm Cymru said that this was driven by the massive demand for content. This however presented challenges:

“...people are working very long hours, they're working production to production without the breaks that they might have had in the past—it's those sorts of challenges to face.”²³

19. These challenges were echoed by production company Bad Wolf who said that despite the eight-month stoppage, they were the busiest they had ever been during the pandemic. However this did create issues with workforce shortages and being able to keep up with demand. They told us that this led to staff undertaking new roles, which was challenging to ensure that they were not overwhelmed.²⁴

20. During our interviews, we were told that:

*'I have been a deputy stage manager, which is something that as a graduate, you don't really expect to do until a couple of years in the industry. There are people in roles they aren't equipped to handle.'*²⁵

²² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 133

²³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 139

²⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 143

²⁵ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

and:

“...it’s great for young graduates etc, but the problem is they don’t have experience, they’re making mistakes that we learned not to make a long time ago that haven’t been passed down. So it feels like we’ve gone back ten years and there’s a skipped generation of skills.”²⁶

21. ITV Cymru Wales explained that the production boom had increased demands for a skilled workforce. This in turn had led to more competition and an increase in costs and salaries.²⁷

22. Evidence from participants at the Workshop broadly concurred with the evidence we considered that the screen sector was doing well.²⁸

23. In writing, the Welsh Government said that unprecedented levels of growth in screen productions across Wales had led to staffing shortages. They also told us that gaming faced challenges in securing funding to help grow the sector. The Welsh Government said that they were delivering a gaming incubator programme aimed at improving the commerciality of established companies via a pilot.²⁹

Low attendances and funding issues

24. In contrast to the screen sector, the live arts are struggling because audience attendances have not recovered to pre-pandemic levels. The Arts Council for Wales (“the Arts Council”) said that:

“Certainly, the pandemic had quite a grave impact on the sector, not only on arts centres, but also on the workforce. Our sector employs and funds less now than it did pre-pandemic. Costs have increased enormously, as is reflected in the report, whilst income is reduced. There are fewer people attending events and therefore the sector is in

²⁶ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) – January 2023 [PDF 277KB]

²⁷ Consultation response: [CIWF17.ITV.Cymru.Wales](#)

²⁸ [Creative industries workforce: Workshop](#) – January 2023 [PDF 172KB]

²⁹ Welsh Government written evidence

quite a serious situation. We've also lost some freelancers in the sector. People have chosen to leave. We have problems in filling vacancies, so we do have some workforce problems too. So, it is quite a grave situation."³⁰

25. Another challenge facing the arts and cultural sectors is rising energy costs. The Music Venues Trust note that increasing energy costs are not practical for the sector; energy prices have risen 300 per cent across their membership, which they felt will lead to venue closures.³¹ The Arts Council said that 56 per cent of all organisations they surveyed are either very or extremely worried about the impact of the increase in energy cost.³²

26. The Arts Council outlined discussions they have had with the Welsh Government about establishing an emergency fund to support the sector. This included the possibility of the Arts Council working with the Welsh Government to provide match funding to create a new fund to help the sector³³.

27. We received evidence that organisations are struggling to recruit and retain staff. National Youth Arts Wales explained:

*"We're having to pay over and above market rates to attract people into those key posts, all at a time when income levels are dropping and audiences aren't returning in the numbers that they were yet pre pandemic."*³⁴

28. The Musicians' Union were very concerned about the state of the music sector workforce, describing it as "very fragile". It said that 49 per cent of musicians were, "...very or extremely concerned they'd be forced to leave the

³⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 121

³¹ Music Venues Trust written evidence

³² Consultation response: [CIWF08 Arts Council of Wales](#)

³³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 142

³⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 129

industry”. The Musician’s Union told us that there are many reasons for this, including the cost of living crisis, Brexit, and static levels of public funding.³⁵

29. Participants at the Workshop said that around half of audiences had not returned to cinemas. In addition, many staff have left and some theatre companies have closed down.³⁶ One comment made during the Interviews noted the precariousness of the live events sector was also highlighted.³⁷

30. In written evidence, the Welsh Government told us that the music sector was one of the hardest hit by the pandemic. We were also told of the challenges presented by the cost of living crisis and a, “...lack of coordinated training provision, clear pathways and insufficient management skills”. The Welsh Government said that Creative Wales is working “to improve and increase business commercial outlook and sustainability and contribute to the development and growth of the music industry in Wales”.³⁸

31. When we asked about the support given to the workforce in the arts and music sectors, the Deputy Minister for Arts, Sport and Tourism (“the Deputy Minister”) said that:

“...we allocated an additional £1 million funding to support the cost-of-living pressures in the arts sector, via the Arts Council of Wales, with £500,000 for 2023, and a further £500,000 in 2023-24. And what the Arts Council of Wales are telling us as well is that their National Lottery funding has performed much better than expected, and that means that they're also now able to direct that additional funding to the cost-of-living pressures being faced by the sector.”³⁹

32. In writing following our evidence session, the Deputy Minister told us that the Welsh Government has allocated £1m to support cost of living pressures

³⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraphs 15 and 17

³⁶ [Creative industries workforce: Workshop](#) - January 2023 [PDF 172KB]

³⁷ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

³⁸ Welsh Government written evidence

³⁹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 43

(£500,000 in this financial year and the next). We were told that this includes a number of organisations whose key focus is music. In addition, in June 2023, the Arts Council launched “cost-of-living top up for existing grants”.⁴⁰

Welsh language

33. We also heard of specific challenges facing the Welsh language workforce across the creative industries. Evidence from our Workshop stated that recruiting experienced staff with Welsh language skills for mid-level roles was difficult⁴¹. S4C said that the increase in the number of productions in Wales had created recruitment challenges. S4C expanded on these shortages in its written evidence:

“In addition to the currently identified shortage behind and in front of the camera, we are increasingly seeing trends for new skills: digital or multi-platform content creation, data scientists, developers and more.”⁴²

34. Evidence from the Interviews that we undertook concurred that the skills shortages in the Welsh language workforce was “scary” and that there were many problems in getting Welsh speaking staff. There was also a question as to why existing school qualifications in Welsh (GCSE and A-Level) still focuses on literature but not on other skills for the sector such as copywriting.⁴³

35. There are several initiatives to improve skills and Welsh language capacity within the creative industries. This includes scholarships through the Coleg Cymraeg Cenedlaethol to enable students to undertake part or all their course in Welsh⁴⁴, while there is investment through the Arfor programme to support

⁴⁰ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

⁴¹ [Creative industries workforce: Workshop](#) - January 2023 [PDF 172KB]

⁴² Consultation response: [CIWF19 S4C](#)

⁴³ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

⁴⁴ Coleg Cymraeg Cenedlaethol: [Scholarships](#)

Welsh speaking communities via economic interventions⁴⁵. We also note that the Creative Skills Action Plan⁴⁶ outlines the following:

- Support delivery of the ambitions of Cymraeg 2050 to promote the language and increase the number of Welsh speakers in Wales by ensuring training provision is promoted and delivered through the Welsh language where possible and those interested in learning or improving their Welsh language skills have the opportunity to do so.
- Work with Welsh Government colleagues in Education to ensure that the promotion of creative careers within the priority sectors is adequately included within the Careers & Work-Related Experiences (CWRE) as a cross-cutting theme of the Curriculum for Wales.

36. During our evidence session, the Deputy Minister told us that a priority for the sector is growing the screen sector by supporting “indigenous products” and targeted investment.⁴⁷ This includes specific funding for Welsh language productions as part of a memorandum of understanding with BBC Cymru Wales and S4C. We were told that this memorandum of understanding alone has provided £1 million in funding for the screen sector.⁴⁸

Our view

37. There is a dichotomy in the health of the creative industries. One part of the creative industries in Wales, the screen sector (including gaming) is thriving. It has recovered quickly from the pandemic and it is one of the engines driving the Welsh economy. While we accept that there are some challenges in this part of the sector, such as ensuring there is a pipeline of talent available to fill the jobs needed (we discuss this further in chapter four), we are assured by the steps being taken by the sector and the Welsh Government in this regard.

⁴⁵ ARFOR: [Second phase of ARFOR](#)

⁴⁶ Creative Wales: [Creative Skills Action Plan 2022-2025](#) – May 2022 [PDF 279KB]

⁴⁷ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 22

⁴⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 124

38. The arts and music sectors are struggling. We remain concerned about the ongoing health of this part of the creative industries. The continuing cost of living crisis restricts the ability of the arts and music sectors to fully recover from the Covid-19 pandemic. This is further compounded by a lack of training and development of clear career pathways (we discuss this further in chapter five).

39. We welcome existing steps taken by the Welsh Government and the Arts Council to help the recovery in arts and music sectors. However, we think there is scope for more to be done, namely through the Welsh Government's forthcoming Culture Strategy.

40. As the development of the Culture Strategy continues, we think the strategy should set out how it will develop and sustain the workforce in the arts and music sectors. We think this would benefit the retention of staff in these sectors, many of whom are freelancers.

Recommendation 1. The Welsh Government should ensure that the forthcoming Culture Strategy sets out support for developing and sustaining the workforce in the arts and music sectors.

41. While we recognise that recruitment and retention of staff is a general problem for the whole industry, we are concerned by the issues facing the Welsh language part of the creative industries.

42. We welcome the Welsh Government's increase in funding available for Welsh language productions. We also agree with the government that the creative industries are a vital cog in working towards the 2050 target of 1 million Welsh speakers. Ensuring there is ample provision of content for both Welsh learners and fluent speakers is vitally important for the Welsh language to thrive in all communities across Wales. Likewise, there has to be sufficient numbers of staff with Welsh language skills to work on such productions. Given our concerns on this, we think more clarity is needed on what is being done to address this problem.

43. Despite a long-term strategy for the Welsh language - Cymraeg 2050⁴⁹ - it is unclear how the various interventions are coordinated to address the current gaps identified within the Welsh language creative industries workforce.

44. The Welsh Government should outline how it is coordinating the different initiatives to ensure there is sufficient Welsh language skills available in the creative industries. The Welsh Government should set out:

- How it engages with industry partners and bodies such as Careers Wales to encourage Welsh speakers to enter the creative industries;
- How it is currently data mapping Welsh language skills needs across the industries;
- How it annually reviews Welsh language skills gaps across the industries.

45. If no specific plans are currently in place, we recommend that the Welsh Government works with partners who require Welsh language skills to develop and implement a scheme to increase the Welsh language workforce in the creative industries.

Recommendation 2. The Welsh Government should outline how it is coordinating initiatives to ensure there are sufficient Welsh language skills available in the creative industries. If no specific plans are currently in place, the Welsh Government should work with partners who require Welsh language skills to develop and implement a scheme to increase the Welsh language workforce in the creative industries.

⁴⁹ Welsh Government: [Cymraeg 2050: Welsh language strategy](#) – 10 July 2017

3. Pay and working conditions

Pay

46. We heard from Professor Justin Lewis (Cardiff University) that typical levels of pay vary considerably across the creative industries with some sub-sectors paying far more than others.⁵⁰ Tom Ware (University of South Wales) added that when freelancers are working (especially in the screen sector), they are earning “relatively good wages”.⁵¹

47. National Youth Arts Wales highlighted the difficulties faced by publicly-funded arts bodies in paying their staff suitably:

“Trying to keep up with pay increases that are affordable in the short term is requiring a lot of organisations to dip into risk reserves or money that they should have to be about long-term development or matching funds that they get from other funders— the arts council, local authorities and so on. So, it's hard to think of a short-term solution that doesn't require some kind of emergency measures and additional cash, and I'm not sure where that would come from.”⁵²

48. We were told by interviewees for this inquiry that live work is underpaid and unstable compared to the screen sector.⁵³

49. The Deputy Minister told us that Creative Wales attaches conditions to grant funding to improve pay and conditions. This only applies to productions that are funded by them⁵⁴.

⁵⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 95

⁵¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 97

⁵² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 162

⁵³ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

⁵⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 54

Working conditions

50. Tom Ware (University of South Wales) said that challenging working conditions, work intensity, and long hours driven by the production boom in the screen industry has an impact:

“People work very, very long hours, especially when they're working on set, on location. There's a rigidity to the working structures there that pressurises people. For instance, a good example would be if you've got small children and you're working in a studio where you're working 16-hour days. The studio might have a nursery on site, but if you don't actually get to see your children at all, it's immaterial where the nursery is.”⁵⁵

51. Professor Justin Lewis (Cardiff University) thinks that there is a role for government, in partnership with broadcasters, to lead on efforts to improve working conditions in the screen industry.⁵⁶

52. In their written evidence, the Welsh Government told us that challenges facing the creative industries include:

“...lower rates of pay and benefits, insecure work, long hours, lack of employee representation, insufficient management capability, and insufficient opportunities for learning and development”.⁵⁷

53. The Deputy Minister told us that the forthcoming Culture Strategy will outline expectations “... very clearly about what cultural organisations look like in Wales and how they employ staff, and what their working conditions are like.”⁵⁸

⁵⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 49

⁵⁶ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 47

⁵⁷ Welsh Government written evidence

⁵⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 55

Bullying and problematic behaviour

54. Unfortunately, much like other organisations and sectors in Wales and the UK, the creative industries isn't immune from inappropriate behaviour. We were told about bullying and problematic behaviour, with examples outlined to us focused on the screen sector.

55. During our Interviews, one interviewee told us:

*"I have lost count the amount of times I have seen people being verbally abused on set. The egos of directors is a real thing and I have to be honest it does not make for a pleasant working environment - from other people I know, I would say it's probably a common occurrence in the industry."*⁵⁹

56. Other participants spoke of welfare concerns and examples of poor treatment on film and television sets.⁶⁰ Participants at our Workshop made several comments regarding "toxic behaviour" within the creative industries workforce. This included a lack of understanding of how to report bad behaviour, a lack of HR structure, "artistic directors holding too much power", and a "small connected industry" making reporting difficult for freelance workers.⁶¹

57. Tom Ware (University of South Wales) said that whilst there is anecdotal evidence of such behaviour, "unreasonable working practices" were a more pressing issue.⁶²

58. We also heard that reporting such behaviour is challenging for victims. BECTU told us that:

⁵⁹ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

⁶⁰ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

⁶¹ [Creative industries workforce: Workshop](#) - January 2023 [PDF 172KB]

⁶² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 49

“There is indeed a culture of fear that prevents victims of bullying and harassment coming forward, for fear of being branded a troublemaker.”⁶³

59. This is unlikely to be helped by productions having what BECTU described as “poorly resourced” human resources provisions. BECTU said that because such operations only last nine to ten months, “...they hope that there will be no further conversation about that”.⁶⁴

60. Broadcasters told us that they have processes and guidelines in place to address such conduct in the workplace.⁶⁵ BBC Cymru Wales has specific processes and guidelines in place with their suppliers with regards to how they treat their workforce.⁶⁶

Mental health

61. CULT Cymru (a learning project led by trade unions in the creative industries) outlined key points from (UK-wide) research undertaken by the Film and TV Charity (a charity that supports screen sector staff) published in February 2020 which noted that⁶⁷:

- Nine out ten people in the sector had had a mental health problem;
- 55 per cent of screen workers had had suicidal thoughts, compared to 20 per cent of the general population;
- 39 per cent of people said they had faced racial harassment and discrimination in the past year;

⁶³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 73

⁶⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 86

⁶⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 74-77

⁶⁶ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 64

⁶⁷ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 65

- 74 per cent of disabled people who had come into the industry had considered leaving;
- only two per cent of people said that they would go to their line manager to talk about the problem”.⁶⁸

62. During the Workshop, academics and workers in the industry highlighted that mental health issues are common among younger staff.⁶⁹

63. CULT Cymru also told us about the well-being facilitator pilot funded by Creative Wales whereby the well-being facilitator works with a production company to support and advise on how best to meet their legal duty of care.⁷⁰ The productions company, Bad Wolf, has taken on funding for a well-being facilitator on set because it recognises the need for mental health support to ensure that all of its teams are feeling comfortable, happy and settled within their working environments.⁷¹

64. BECTU said that the Welsh Government could be working closer with the unions on projects similar to the well-being facilitator initiative.⁷²

65. Broadcasters outlined numerous interventions they have made on mental health in the workplace, including the introduction of well-being facilitators and mental health first aiders.⁷³

66. In May 2023, the Welsh Government announced a second phase of the well-being facilitators programme. It noted at the time that:

“Phase 2 of the pilot will build on the lessons learnt over the last six months and enable a new cohort of production companies to benefit

⁶⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 67

⁶⁹ [Creative industries workforce: Workshop](#) - January 2023 [PDF 172KB]

⁷⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 65

⁷¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 180

⁷² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 73

⁷³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 86-90

from the support and advice on offer with the aim of increasing wellbeing on set and improving staff retention.”⁷⁴

67. The Welsh Government told us during our oral evidence session that the well-being facilitator programme is working well and they are going to try and “...replicate it into the music sector, and in the digital sectors over time”.⁷⁵

Our view

68. The success of the screen industry in Wales is driven by the imagination, expertise and hard work of the talented people who work within it. We have however received compelling evidence that long hours, work intensity, poor working culture and practices are creating environments harmful to the mental health and wellbeing of the workforce. In a vital industry, driven by talent, the finding that large numbers of the workforce are considering leaving is a serious and pressing concern. We believe that the Welsh Government has a greater role to play in changing the industry’s approach to workplace well-being. The Welsh Government should play a coordinating role in addressing this. We think the Welsh Government needs to lead the way by supporting and promoting best practice, and by setting the expectations for the industry through the Culture Strategy.

69. During our evidence gathering we have been told about bullying and inappropriate behaviour within the creative industries. This is both regrettable and unfortunate. As we have said in other similar work, it is unacceptable that workers should be subject to such behaviour at work, a place which should be a safe space for them. We are determined to ensure that all those who participate and work within the creative industries in Wales can do so without fear of prejudice, bullying or discrimination.

70. The support provided by the Welsh Government (through Creative Wales) to improve mental health and wellbeing is to be welcomed. We are also pleased

⁷⁴ Welsh Government: [Further funding for wellbeing facilitators in Wales’ screen sector announced](#) – 17 May 2023

⁷⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 62

that the second phase of the well-being facilitator pilot is being rolled out and hope to see it extended to other sectors within the creative industries.

71. However, more action is required to put an end to bullying in the workplace. We think the Welsh Government, in partnership with trade unions and production companies, should review what further measures can be introduced to ensure that workers are able to work safely in a tolerant and fair working environment.

72. In addition, given the size of the industry and the demand for skilled workers, staff retention is essential. We are of the view that such a piece of work could go some way to help with staff retention. This work should be undertaken over the next six months and the Welsh Government should report its findings to the Committee before the end of the financial year.

Recommendation 3. The Welsh Government, in partnership with trade unions and production companies, should identify best practice to ensure that workers can work in an environment free of discrimination, bullying and prejudice. The Welsh Government should report back to the Committee within six months on its progress with this recommendation.

73. We have also noted evidence that suggests workers in the screen industries can earn good wages, which is positive. However, we also know that challenges remain in the art, culture and music sectors with regards to pay and staff retention. As pressure on public funding continues, this unfortunately, is unlikely to improve in the near future. Any additional funding that these sectors has been provided with recently will have been eroded by spiralling inflation. This, combined with existing funding pressures for the art, culture and music sectors more generally (such as lower audience numbers and higher energy costs), means being able to provide competitive salaries is very challenging.

74. We accept that funding pressures mean the Welsh Government is unlikely to be able provide significant additional funding to allow the arts, culture and music sectors to compete with the screen sector with regards to pay. However, we do think the Welsh Government, working with the Arts Council, should review what additional resource is required by these sectors to achieve equitable

pay settlements. This would help provide a clear picture of the situation. This work should be completed in time for the next financial year.

Recommendation 4. The Welsh Government and the Arts Council of Wales should review what additional resource is required by the arts, culture and music sectors to achieve equitable pay settlements and outline what additional support they can provide. This work should be completed in time for the next financial year.

75. Finally, we think the Welsh Government’s commitments to enshrining fair pay and working conditions into projects it funds is very important. The Welsh Government told us that the forthcoming Culture Strategy will outline what “cultural organisations [will] look like in Wales and how they employ their staff and what their working conditions are like”. We think the Welsh Government should build on these positive interventions to ensure that the growth in the creative industries is both sustainable and fair, in both the public and private sectors. As such, we recommend that the Welsh Government enshrines existing provisions on fair pay and working conditions and the use of well-being facilitators in its forthcoming Culture Strategy. By doing this, we think the Welsh Government will be sending a strong message as to how it thinks the creative industries can be fair and sustainable to all who work within it.

Recommendation 5. The Welsh Government should include provisions on fair pay and working conditions and the use of well-being facilitators in the forthcoming Culture Strategy.

4. Equality, diversity and inclusion

76. Witnesses told us that more needs to be done to mitigate the impact of working conditions in the creative industries on equality, diversity and inclusion.

77. Tom Ware (University of South Wales) told us that transport is a big issue within the screen sector, due to filming on location away from accessible public transport. Not having access to a car or being able to drive is therefore a “huge inhibitor”.⁷⁶ He also called for better analysis of employment and hiring practices because:

“...the short-termism of the industry works against employing people from broader, diverse backgrounds. When I say ‘diverse backgrounds’, really I mean lower socioeconomic backgrounds. Obviously, that’s reflected in the ethnic diversity of people, but it’s people from lower socioeconomic backgrounds who find that inhibiting.”⁷⁷

78. Professor Justin Lewis (Cardiff University) was positive about the possibilities for improving equality, diversity and inclusion by noting work that was underway. He told us that Media Cymru had been working with companies to make the sector more inclusive⁷⁸. However he did add that:

“...the working practices thing does need to shift in terms of employment and how people are employed within the industry. It needs to move towards the kind of employment practices that we would expect in Welsh Government, or in universities, where you would expect certain standards to allow equal opportunities for all.”⁷⁹

⁷⁶ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 52-53

⁷⁷ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 54

⁷⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 62

⁷⁹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 64

79. In this regard, Ffilm Cymru said that when the Welsh Government issues funding contracts, they can do more in terms of what they ask of production companies.⁸⁰

80. ITV Cymru Wales noted in their written submission that broadcasters and media companies need to collaborate more to identify and retain diverse talent.⁸¹ S4C told us that its:

“...main priorities are to improve inclusion in terms of disability and minority ethnicity as these are the two characteristics most underrepresented in the screen sector in Wales.”⁸²

81. A number of points were mentioned at our workshop at the University of South Wales in relation to this matter, including that:

- Tokenistic representation takes place rather than structural change.
- People are recruited for visibility, but not developed.
- Organisations are not held accountable for equality, diversity and inclusion.
- Disabled people are under-represented in the screen industries. There are very few disabled people in senior positions. Screen productions [in receipt of Welsh Government funding] should have to sign up to a standard of equality, diversity and inclusion for Welsh Government funding.
- Higher education needs to look at equality, diversity and inclusion to prepare people before they enter industry.⁸³

⁸⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 209

⁸¹ ITV written submission

⁸² S4C written submission

⁸³ [Creative industries workforce: Workshop](#) – January 2023 [PDF 172KB]

82. The Deputy Minister confirmed that, where the Welsh Government is directly funding organisations, it makes equality, diversity and inclusion a contractual obligation of that funding.⁸⁴ The Deputy Minister also told us that:

“We provided over £400,000 to the Arts Council of Wales to deliver a series of commissioning projects that would deliver black, Asian and minority ethnic heritage projects across the arts sector.”⁸⁵

83. The Welsh Government also drew our attention to existing examples of good practice, such as one production company providing transport for young adults to get them to work and back. The Welsh Government noted that such examples need to be promoted as good practice for others to take up.⁸⁶

Limited data

84. We also heard that good data on equality, diversity and inclusion in the creative industries was lacking.

85. Professor Justin Lewis (Cardiff University) told us there is a two-year lag from the time data is collected before data sets are presented.⁸⁷ Tom Ware (University of South Wales) added that Media Cymru has launched a screen workforce survey, which will provide new insights into the workforce. The survey, he said, is driven by workers themselves rather than employers.⁸⁸

86. The general view from unions on data collection is that current equality, diversity and inclusion data is not adequate. CULT Cymru said the available data is very poor, although steps are being taken to address this.⁸⁹ Equity said the

⁸⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 71

⁸⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 71

⁸⁶ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 78

⁸⁷ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 66

⁸⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 67

⁸⁹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 81

current data is patchy and focuses on employees rather than freelance workers. They said the problem with this is that someone may only be working for a few days and would not be included in such a survey.⁹⁰

87. The Musicians' Union said that data has historically been collected at a UK level and felt that more should be collected on a Welsh level.⁹¹ Similarly, National Youth Arts Wales noted that it was hard to assess diversity in the arts as they were not aware of any baseline data for Wales.⁹²

88. The Arts Council told us that it collects:

"...data on a six-monthly basis from the organisations that we support. There is more work that needs to be done on it, though. I think that we need to improve the quality of the data and get it to be more nuanced,"⁹³

89. S4C conceded that it has a lot of work to do from a data collection perspective in measuring equality, diversity and inclusion within the organisation. It told us this was one of their biggest priorities and that there will be an improvement in this within a year.⁹⁴

90. The Welsh Government told us that, through annual industry survey's, it now has better information on inclusivity and diversity statistics within the sector. It noted that, over time, the findings will provide a clearer outline on where to target investment.⁹⁵

⁹⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 84

⁹¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 82

⁹² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 186

⁹³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 191

⁹⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 37

⁹⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 70

91. In writing following our session, the Deputy Minister provided us with an overview of diversity statistics collected by Creative Wales. The most recent figures are available online, and cover the years 2016-21⁹⁶. These figures do not, in the main, include freelance workers, who make up an estimated half of the creative industries workforce. The Deputy Minister also confirmed that although Creative Wales collects data on ethnicity, this is limited to business owners, directors or partners.⁹⁷ It was noted that “it is evident from these figures that ethnic representation was still not reflective of the population averages”.⁹⁸

Our View

92. The growth in the creative industries in Wales, especially within the screen sector, is something we should be very proud of. The challenge, in our view, is to ensure this growth is both sustainable and fair by providing real opportunities for all. We welcome the lead taken by the Welsh Government by ensuring that the projects it funds include contractual clauses on equality, diversity and inclusion. However, we believe that more needs be done to mainstream working practices aimed at improving diversity and inclusion, and that the Welsh Government has a key role to play in promoting good practice and influencing change across the sector.

Recommendation 6. The Welsh Government should mainstream contractual clauses on equality, diversity and inclusion within production funding agreements to improve equality, diversity and inclusion. The use of these should also be stipulated within the forthcoming Culture Strategy, and used wherever possible.

93. We were disappointed by the level of data that is available on equality, diversity and inclusion in the creative industries in Wales. While we welcome the progress that has been outlined, notably the screen industry workforce survey and the Creative Wales industry survey, there is much more to do. We think that good data is essential to understand the demographic constitution of the

⁹⁶ Welsh Government: [Ad-hoc statistical requests: 25 April to 6 May 2022](#) – 2 October 2023

⁹⁷ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

⁹⁸ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

workforce so that equality, diversity and inclusion matters can be identified and addressed. In order to achieve this, existing data collection needs to be enhanced and the Welsh Government should work with partners such as the Arts Council and the academic partners to achieve this. We think that better data collection from a broader range of sectors within the creative industries will help further identify issues that need addressing.

Recommendation 7. The Welsh Government should work with the Arts Council of Wales and the academic partners to outline how it can improve data collection on equality, diversity and inclusion. The Welsh Government should report back to the Committee within three months on how it intends to achieve this.

5. Skills and training

94. In 2019, our predecessor Committee (the Culture, Welsh Language and Communication Committee) undertook an inquiry⁹⁹ into film and major television production in Wales. The Committee heard at the time that the biggest factor restricting growth in the screen industries in Wales is a potential skills shortage.¹⁰⁰

95. In its report, the predecessor Committee called on the Welsh Government to publish a screen strategy which, among other things, would include taking “responsibility for identifying and mitigating skills gaps”.¹⁰¹

96. In September 2021, the Welsh Government announced that, “...a new creative skills body will be delivered internally through Creative Wales” (the Welsh Government’s creative industries division).¹⁰²

97. In February 2022, Screen Survey Wales – a report by the University of South Wales in collaboration with Creative Wales into the screen industries – was published. The report found that, “...there are numerous skills gaps currently impacting the screen industry pan-Wales in 2020-21”.¹⁰³

98. In September 2022, the Welsh Government announced a Creative Skills Action Plan¹⁰⁴, backed by a £1 million Creative Skills Fund¹⁰⁵. 17 projects will receive a total of £1.5 million for the period 2022-2024.¹⁰⁶

⁹⁹ Culture, Welsh Language and Communications Committee – Fifth Senedd inquiry: [Film and major television production in Wales](#)

¹⁰⁰ Culture, Welsh Language and Communications Committee – Fifth Senedd inquiry: [Film and major television production in Wales](#)

¹⁰¹ Culture, Welsh Language and Communications Committee – Fifth Senedd inquiry: [Film and major television production in Wales](#)

¹⁰² Welsh Government: [Written Statement: A new Creative Skills Body for Wales](#) – 16 September 2021

¹⁰³ University of South Wales: [Screen Survey Wales 2021](#) – February 2022

¹⁰⁴ Creative Wales: [Creative Skills Action Plan 2022-2025](#) – May 2022 [PDF 279KB]

¹⁰⁵ Welsh Government: [New plan to help develop Wales’ creative talent](#) – 21 September 2022

¹⁰⁶ Welsh Government: [New funding awarded to projects to improve skills in Wales’ creative sector](#) – 9 February 2023

99. In June 2023, the Welsh Government published a commissioned report by Hefin David MS, “Transitions to Employment”.¹⁰⁷ Among the recommendations in that report is that:

- Learners should be provided with meaningful work experience opportunities;
- Learners should have full clarity of the options available to them for post-compulsory education at an early age; and
- That there must be better joint working between schools, colleges and employers in order to provide mutual benefits to learners and the broader education sector.¹⁰⁸

Longer term planning for skills

100. Several witnesses noted that existing skills planning for the creative industries takes a short-term approach. Tom Ware (University of South Wales) told us that the issue was not an absence of training, but that it was reactive to short term needs¹⁰⁹. BBC Cymru Wales concurred with this view. It said:

“...it feels as the moment that we are responding to the current challenges, and looking at what the need currently is, and perhaps we need to look further ahead in terms of future skills, and what those might be.”¹¹⁰

101. In addition, S4C said that developing talent needs more longer term planning than currently exists. They noted that planning for posts in high-demand roles should start young, not just through post-16 training.¹¹¹

¹⁰⁷ Welsh Government: [Transitions to employment: report](#) – 26 July 2023

¹⁰⁸ Welsh Government: [Transitions to employment: report](#) – 26 July 2023

¹⁰⁹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 76

¹¹⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 118

¹¹¹ S4C written evidence

Training for arts and music sectors

102. We were told that training for arts and music is absent from existing skills planning. The Music Venues Trust told us that the Welsh Government’s Creative Skills Action Plan is :

“...more focused towards TV and production, particularly, different Creative Wales stakeholder meetings that I attend tend to focus heavily on the film and TV industry.”¹¹²

103. Similarly, National Youth Arts Wales noted that the “the focus at the minute for organisations like Creative Wales is really focused on film and television, and there isn't a similar route in arts and culture”.¹¹³ They also told us that staff retention in the publicly funded sector was particularly challenging:

“I do think there is a bit of an issue— and we’re really feeling it at the minute— where the private sector does benefit, because we are investing and we’re not able to retain staff, because we can’t compete with pay and working conditions.”¹¹⁴

104. In response, the Welsh Government told us that “there's a lot of money going into digital, into music, into cross-sector projects”.¹¹⁵ from the Creative Skills Action Plan. For example, we were told that the national youth arts group has received funding to help work with young people in the theatre sector to take their skills into the screen industries. The Welsh Government also said that Creative Wales was set up to put more investment into such sectors alongside the screen industries.¹¹⁶

¹¹² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 208

¹¹³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 152

¹¹⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 219

¹¹⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 103

¹¹⁶ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 103

105. The Deputy Minister told us that given the success of the screen industries in Wales, it had received the majority of funding.¹¹⁷

Resourcing skills development

106. Questions were also raised regarding the sufficiency of funding for skills development in the creative industries. ITV Cymru Wales questioned whether Creative Wales is sufficiently resourced to be able to monitor the impact of the funding and training provided.¹¹⁸ In their written evidence to our inquiry, ITV Cymru Wales said:

“We would like to see further support from public bodies to address the skills shortage in the sector, with the expansion of traineeships, internships and work placement programmes. Vocational training in a professional setting is vital to tackle the issue, and closer links between formal education and the industry is urgently needed.”¹¹⁹

107. S4C called for further investment to ensure that a sustainable sector can compete with both the domestic and international demands placed upon it.¹²⁰

108. The Deputy Minister addressed criticism that funding for skills was insufficient:

“Everything we deliver... we could always do with more money, but £1 million a year I don't think is a bad start for a creative skills fund, and we've had a significant number of very positive projects that have benefited in the first year...”¹²¹

¹¹⁷ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 102

¹¹⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 113

¹¹⁹ ITV Cymru Wales written evidence

¹²⁰ S4C written evidence

¹²¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 86

Apprenticeships

109. The structure of the creative industries can also pose challenges for the delivery of apprenticeships. Equity told us:

“It’s very difficult to place an apprentice on a four-week production. There needs to be a much more creative approach to apprenticeships within the creative industries, because they’re not necessarily going to find something that is going to be for the entire period of their apprenticeship.”¹²²

110. One solution that was suggested would be “shared apprentices”. The example given by CULT Cymru noted how smaller theatres would share an apprentice as they would not have capacity to have their own.¹²³

111. S4C noted that one of their priorities was to work with Creative Wales on developing Welsh language apprenticeships, as there is currently a shortage.¹²⁴

112. Evidence from the Interviews we undertook highlighted a concern that there was an a shortage of apprenticeships. Another noted that apprenticeships were positive as it allowed for learning from an experienced colleague and to be “hands on”.¹²⁵

113. In written evidence, the Welsh Government told us that:

- On funded projects, more than 267 placements (including apprenticeship placements) supported since January 2020;

¹²² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 103

¹²³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 106

¹²⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 22

¹²⁵ [Engagement findings: Inquiry into the challenges facing the creative industry workforce in Wales](#) - January 2023 [PDF 277KB]

- Creative Wales helped establish “Criw”, a film and tv apprenticeship programme.¹²⁶

114. Further, the Welsh Government told us that due to the shortage of large employers, the shared apprenticeship model, where apprentices work with different businesses, works well:

“We piloted that in the south-east. Education colleagues recognised that as a real qualification, so we’re now rolling it out up into north Wales as well.”¹²⁷

Career opportunities

115. Wales Interactive felt that greater awareness of the varied roles within the games sector is needed:

“Understanding opportunities as well is a really big key one. All of the varying roles from the industries and that side of things, we just find, sometimes, especially with games, we get lumped into, ‘You’ve got to be a programmer to work in games.’”¹²⁸

116. Similarly, the Music Venues Trust told us:

“I didn’t know about jobs like promoters rep or production manager until I was actually already working in the industry. So, I think there’s something there about how do we get school-age kids and school leavers— and people actually outside mainstream education as well— aware of these jobs.”¹²⁹

¹²⁶ Welsh Government written evidence

¹²⁷ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 117

¹²⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 195

¹²⁹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 193

117. Screen Alliance Wales has been undertaking work in “communities that wouldn't normally traditionally think of coming into film and tv as a career”.¹³⁰ They do this by delivering community workshops, and holiday and after-school clubs. Screen Alliance Wales noted the more that they can get into such communities, the better diversity will be.¹³¹

118. Interviewees we spoke to told us that there are shortages of female camera operators; skills in the gaming industry and technical skills such as rigging.

119. Equity said that the inclusion of expressive arts in the new curriculum was a positive step.¹³² BBC Cymru Wales mentioned the work it is undertaking with Careers Wales, through the new curriculum, to show the breadth of roles available within the organisation.¹³³

120. The Welsh Government told us that as part of the Young Person's Guarantee¹³⁴. This includes £2m (no time period was provided for this expenditure) which has been provided to ensure every further education college has an enhanced Employment and Enterprise Bureau. In addition, Inspiring Skills Excellence in Wales provides young people with an opportunity to challenge and raise their skills. We were told that there a number of competitions held for the creative industries Such competitions include 3D Digital Game Art, Fashion Design and Technology, Graphic Design, Digital Media Production and an Inclusive Skills: Media competition.¹³⁵

121. The Welsh Government explained that Careers Wales works in a range of education settings to support “young people to become more effective at

¹³⁰ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 187

¹³¹ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 187

¹³² Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 101

¹³³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 11 January 2023, paragraph 51

¹³⁴ Welsh Government: [The Young Person's Guarantee](#) - 27 March 2023

¹³⁵ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

planning and managing their careers in an ever changing and complex job market”. This offer includes¹³⁶:

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

122. Careers Wales also has digital tools to help learners explore different career pathways in the creative industries.¹³⁷

123. The Deputy Minister also drew our attention to the work of the Screen Academies Network, which “has an excellent track record of working extensively with both schools and colleges, providing outreach work, masterclasses and work experience placements”.¹³⁸ The new screen academies will support students and early career screen employees across Wales.¹³⁹

Our View

124. A potential skills gap in the screen industries was noted when the predecessor Committee undertook its inquiry in 2019, and identified as a potential brake on growth. We think sustained and significant support is needed, given the current growth and benefits of a skilled, indigenous workforce.

125. In our evidence, we heard that existing approaches to skills development and planning is reactive, and that better long term planning is needed. We also

¹³⁶ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

¹³⁷ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

¹³⁸ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

¹³⁹ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

noted the concern that current resources are not sufficient to manage the growth in the sector. This includes ensuring the available workforce is able to meet both domestic and international demands placed upon it.

126. We are pleased to see the Welsh Government making progress on the recommendations made in the 2019 report. These include the establishment of Creative Wales and the introduction of the Creative Skills Action Plan. However we do not think this should be considered as the ceiling of what is required for the creative industries. Growth in the screen sector, and the further needs of the publicly-funded arts and culture sectors, suggests more is required. We think the Welsh Government should seek to provide further funding for the Creative Skills Fund. This should be accompanied by working hand in hand with industry to identify future skills gaps. We also think the fund should be placed on a longer-term footing in order to allow for better planning of the skills pipeline. This would mean continued funding beyond the existing commitment which ends in 2024. These actions, in our view, will mean skills training is less reactive to skills shortages and more proactive in terms of fulfilling future skills needs.

Recommendation 8. We recommend that the Welsh Government increases the funding available through the Creative Skills Fund and works with industry to identify future skills gaps.

Recommendation 9. The Welsh Government should provide longer term (beyond 2024) funded support for skills development in the creative industries.

127. As well as ensuring that there is enough funding for skills development, attracting enough people to want to work in the creative industries is essential. We heard from witnesses that there needs to be a better awareness of the career opportunities that are available within the creative industries. This includes ensuring that careers advice that is provided in education settings provides adequate information on potential careers in the creative industries.

128. As outlined in the “Transitions to Employment” report¹⁴⁰, learners should be able to experience a range of different workplaces. We think there is some good practice already in existence, such as broadcasters visiting schools, engagement

¹⁴⁰ Welsh Government: [Transitions to employment: report](#) – 26 July 2023

with higher education institutions, and community workshops. Examples of similar work was highlighted by the Deputy Minister in writing following our evidence session. But, much of this activity is intertwined with support for careers more generally. We think there is scope for more support targeted specifically at the creative industries.

129. Given the growth of the creative industries in Wales, we expect that the skills needed are likely to be in high demand in the future. However, while there is a role for government to lead on this, we do think that joint working isn't solely the responsibility of the Welsh Government.

130. To that end, we think the Welsh Government should work with schools, further and higher education institutions, and the wider industry, to create clear pathways, and to ensure that young people are aware of the range of career opportunities that are available to them in the creative industries. We think the Welsh Government should outline how it will do this by the next financial year and report back to the Committee with its plans. As part of this, we would also like assurance on information provided through careers advice services to learners about careers in the creative industries. This recommendation is consistent with the first three recommendations of the "Transitions to Employment" report.

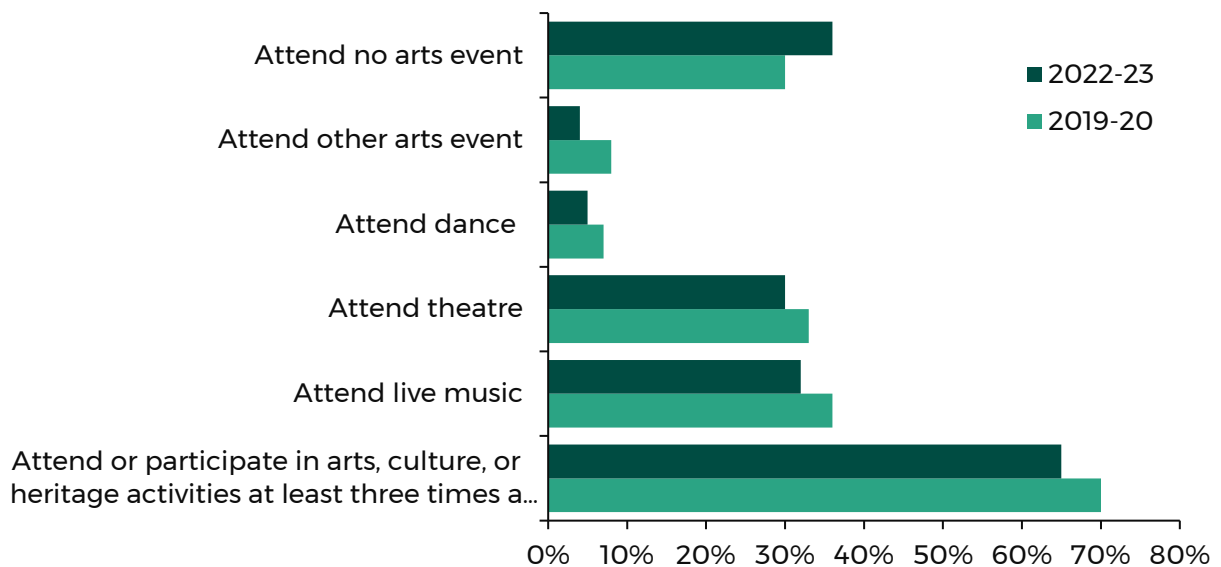
Recommendation 10. The Welsh Government should undertake joint-working with schools, education providers and the creative industries to ensure that young people are aware of the range of career opportunities, and have the required skills, to work in the creative industries. The Welsh Government should report back to the Committee by the end of March 2024 with an outline of how it will do this.

6. Broader support for the creative industries

131. Since the start of Covid-19 pandemic, arts and culture organisations have faced a number of threats. Given the financial pressures on certain aspects of the creative industries, we heard a range of calls for broader support for the industry.

132. One of the challenges is that audiences have not returned to their pre-pandemic levels. The arts indicators in the National Survey for Wales show that all forms of attendance are down compared to before Covid-19. The number of people attending or participating in a cultural event three or more times a year is down from 70 per cent to 65 per cent.¹⁴¹ The Music Venues Trust has previously said that the number of events at grassroots music venues is down 17 per cent compared to 2019 (the year before the pandemic).¹⁴²

Arts attendance (2019-20 and 2022-23)¹⁴³



133. Ffilm Cymru called for more support for cinemas:

"I think it's really important to have not a cultural recovery fund on the scale that we've seen, with Treasury support, but that we do look at

¹⁴¹ Welsh Government: [National Survey for Wales headline results: April 2022 to March 2023](#) - 11 July 2023

¹⁴² Music Venue Trust: [Annual Report 2022](#) - January 2023 [PDF 5.7MB]

¹⁴³ National Survey for Wales

*exhibition. [...] If they collapse, that's the whole of the independent film financing model that they take with it. So, it's a big concern."*¹⁴⁴

134. The Deputy Minister told us that support for screen production is spread across both indigenous and inward investment projects. This approach, she said, creates an environment to allow Welsh companies to grow.¹⁴⁵ The Deputy Minister also said that the Welsh Government was aiming to spread this growth across the country:

*"We've seen, recently, the development of the Aria studios in Anglesey, so that's one example of where we're trying to spread that investment, and we're also working closely to provide funding for Gogledd Creadigol in north Wales as well. We're really trying to build on the success of what we've seen in south-east Wales and spread that to other parts of Wales, and we're certainly seeing that investment in the north now."*¹⁴⁶

135. The Deputy Minister also outlined the support for cinemas. The Welsh Government has this year provided £33,500 to Film Hub Wales to support "audience-building activities in cinemas". The Deputy Minister noted that the British Film Institute also "provides financial support to hubs¹⁴⁷ across the UK to support independent cinemas". She noted that Film Hub Wales receives around £200,000 annually from that fund.¹⁴⁸

136. In writing following our evidence session, the Deputy Minister noted that the Arts Council gathers information on audience figures through its Arts

¹⁴⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 168

¹⁴⁵ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 22

¹⁴⁶ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 29

¹⁴⁷ Film Hubs are is a UK wide network of hubs which fund, train and advise organisations that screen film, from film festivals, to societies and mixed arts centres.

¹⁴⁸ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 25 May 2023, paragraph 135

Portfolio Wales 2022/23 survey¹⁴⁹, and provided a link to data for the 2021//22 financial year. Her letter notes that there's been a slight increase in audience attendance last year but the figures have not reached pre-pandemic levels. The Deputy Minister confirmed that information relating solely to audience figures in the music industry in Wales is not currently collected.¹⁵⁰

137. We also discussed the value of introducing universal basic income into the creative industries.

138. Equity called on the UK Government to introduce a basic income for creative workers in the UK. Equity says it would be “helpful for our members starting out in their career who have not yet had the opportunity to build a portfolio and establish networks within the industry”.¹⁵¹ They noted that such a scheme would entail providing a “simple universal payment to all artists each month”, similar to the basic income pilot in the Republic of Ireland.¹⁵²

139. Ffilm Cymru stated that there could be value in it for people at the early stages of their careers.¹⁵³

140. Professor Justin Lewis (Cardiff University) said that the introduction of universal basic income is “potentially one of the solutions to, I think, the precarity of labour in the creative industries”.¹⁵⁴ The Arts Council while recognising it as a long term solution, said it would provide “a foundation to build upon and would ensure that we have a sector that is sustainable for the future.”

Our View

141. We are concerned about the impact the cost of living crisis is having on arts and music venues in Wales. As outlined, audience levels (a key income stream for

¹⁴⁹ Arts Council of Wales: [Arts Portfolio Wales Survey Highlights 2021-2022](#) - 12 May 2023 [PDF 1.1MB]

¹⁵⁰ [Letter from the Deputy Minister for Arts, Sport and Tourism: Challenges facing the creative industry workforce in Wales](#) - 18 July 2023 [PDF 271KB]

¹⁵¹ [Additional evidence from Equity](#)

¹⁵² [Additional evidence from Equity](#)

¹⁵³ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 30 November 2022, paragraph 222

¹⁵⁴ Record of Proceedings: Culture, Communication, Welsh Language, Sport, and International Relations Committee - 26 October 2022, paragraph 95

arts and music venues) still have not returned to their pre-pandemic levels. At the same time, the sector is also having to deal with higher energy costs.

142. We have previously raised concerns that arts venues will have to increase prices as a result of the cost of living crisis. In our report, *Increasing costs: impact on culture and sport*¹⁵⁵, we outlined concerns that such price increases would deter people from less affluent backgrounds from participating in the arts. The Welsh Government rightly provided support during the pandemic to shore up this sector, and it has provided some additional funding since. However we still think this investment would be wasted if further support is not provided.

143. Given all this, we think an assessment is required of the health of arts venues in Wales (including theatres and music venues). The Welsh Government should work with the Arts Council, the Music Venues Trust and other organisations, to assess the health of arts and music venues in Wales. This assessment should consider current attendance levels and the financial security of such venues. Once this assessment is completed, we think the Welsh Government would be in a good position to determine what further support is needed for arts and music venues.

Recommendation 11. The Welsh Government should urgently undertake an assessment of the financial health of arts venues in Wales in collaboration with the Arts Council of Wales, the Music Venues Trust and other suitable organisations. This assessment should be completed before the next financial year in order to allow for any further support to be provided if required.

144. We are also concerned about the warnings made about the potential collapse of the cinema sector in Wales. Should this sector collapse, it could have a significant impact on the independent film market. As with arts and venues, we think the Welsh Government urgently needs to assess the health of this sector and should work with Ffilm Cymru to do this. This work should be completed before the next financial year to allow for any further support to be provided immediately.

¹⁵⁵ Committee report: [Increasing costs: Impact on culture and sport](#) – November 2022 [PDF 243KB]

Recommendation 12. The Welsh Government should urgently undertake an assessment of the health of the cinema sector in collaboration with Ffilm Cymru. This assessment should be completed before the next financial year in order to allow for any further support to be provided if required.

145. We also note the developments regarding the basic income pilot in Ireland. As outlined already, given the precariousness of the arts, culture and music sectors at the moment, we think the Welsh Government should review the outcome of the pilot at the appropriate time.

Recommendation 13. The Welsh Government should review the outcomes of the Irish Government's Basic Income for the Arts pilot at the appropriate time.

Annex 1: 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
26 October 2022	<p>Professor Justin Lewis, Professor of Communication and Creative Industries, Cardiff University</p> <p>Tom Ware, Associate Dean, Media Transformation and Partnerships, Faculty of Business and Creative Industries, University of South Wales</p> <p>Dafydd Rhys, Chief Executive Officer, Arts Council of Wales</p> <p>Gillian Mitchell, Chief Executive Officer, National Youth Arts Wales</p> <p>Clara Cullen, Venue Support Manager, Music Venue Trust</p>
30 November 2022	<p>Andy Warnock, Wales and South West England Regional Officer, Musicians' Union</p> <p>Simon Curtis, National and Regional Official, Wales and South West England, Equity</p> <p>Carwyn Donovan, Wales Negotiations Officer, Broadcasting, Entertainment, Communications and Theatre Union (BECTU)</p> <p>Pauline Burt, Chief Executive Officer, Ffilm Cymru Wales</p> <p>Gabriella Ricci, Production Executive, Bad Wolf Studios</p> <p>Allison Dowzell, Managing Director, Screen Alliance Wales</p>

	<p>Richard Pring, Founder & Director, Wales Interactive</p> <p>Siân Gale, Skills and Development Manager, CULT Cymru</p>
<p>11 January 2023</p>	<p>Sian Gwynedd, Head of People, Culture and Partnerships, BBC Cymru Wales</p> <p>Siân Doyle, Chief Executive Officer, S4C</p> <p>Nia Britton, Operations Manager, ITV Cymru Wales</p>
<p>25 May 2023</p>	<p>Dawn Bowden, Deputy Minister for Arts, Sport and Tourism Welsh Government</p> <p>Gerwyn Evans, Deputy Director Creative Wales, Welsh Government</p>

Annex 2: 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
CIWF 01	Centre for Media and Culture in Small Nations
CIWF 02	IWA
CIWF 03	Malcolm Henson (Individual)
CIWF 04	Media Cymru
CIWF 05	Music Venue Trust
CIWF 06	University of south Wales
CIWF 07	Members of Publishing Wales
CIWF 08	Arts Council Of Wales
CIWF 09	National Youth Arts Wales
CIWF 10	Books Council of Wales
CIWF 11	Creative Cluster Group
CIWF 12	Social Enterprise Stakeholder Group
CIWF 13	Equity
CIWF 14	Musicians' Union
CIWF 15	TAC
CIWF 16	Ffilm Cymru
CIWF 17	ITV Cymru Wales
CIWF 18	BBC Cymru Wales
CIWF 19	S4C