

Wales Screen Workforce Survey

2022



media
cymru



University of
South Wales
Prifysgol
De Cymru

Dr Helen Davies, Dr James Davies, Richard Hurford



Background to this Report

This report is produced by the University of South Wales for Media Cymru, part of UK Research and Innovation's (UKRI) flagship Strength in Places Fund supported by Cardiff Capital Region, Creative Wales, and industry and university partners.

Media Cymru is a Consortium of 23 partner organisations all with one aim, to turn Cardiff Capital Region into a global hub for media innovation and a driving force for sustainable and inclusive economic growth in the Welsh media sector. Media Cymru is a 5-year project funded through £22m from the UKRI Strength in Places Fund, £3m from Cardiff Capital Region, £1m from Welsh Government, through Creative Wales, and £23m match funding from industry and university partners.

This work was supported by the UK Research and Innovation Strength in Places Fund (Grant number 9991).

For further information please contact: media.cymru@southwales.ac.uk

Suggested citation

Davies, H., Davies, J. & Hurford R. (2023) Wales Screen Workforce Survey 2022. Media Cymru publication series. Cardiff, Media Cymru.

ISBN: 978-1-909838-65-9

Copyright © Media Cymru / University of South Wales 2023.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means without written permission from the publishers.

Dr Helen Davies, Dr James Davies and Richard Hurford have asserted their right to be identified as the authors of this work in accordance with the Copyright, Designs and Patents Act 1988.

¹ UK Research and Innovation, Strength in Places Fund [n.d.] <<https://www.discover.ukri.org/strength-in-places-fund/>> [accessed 1 August 2023]

Acknowledgements



We wish to thank Media Cymru for supporting and enabling us to complete this important piece of research. Special thanks to the Media Cymru delivery and research teams for their support.

We would also like to thank the wider University of South Wales team, Sally Lisk-Lewis, Sara Buckingham, Dr Bethan Jones, Tom Ware and Professor Lisa Lewis.

Lastly a huge thank you to all of the respondents from the Welsh screen sector, without whom this report would not provide such rich insights.

The Centre for the Study of Media and Culture in Small Nations at University of South Wales delivers high-quality collaborative research and innovation on the creative industries in Wales through the frame of small nations globally. It is based in the Faculty of Creative Industries and works closely with Film and TV School Wales. The Centre has strong UK and international partnerships with research universities and creative industries organisations delivering a range of multidisciplinary grant-funded projects.

² University of South Wales, Centre for the Study of Media and Culture in Small Nations [n.d.] <<https://culture.research.southwales.ac.uk/>> [accessed 1 August 2023]



Content

Key Findings	07
Introduction	11
Methodology	13
Online surveys	15
Data analysis and thematic approach	18
Characteristics of the Welsh Workforce	19
Diverse demographic	20
Employment	29
Sub-sector workforce	31
Welsh language	32
Skills and Training	36
Education	41
Welsh language skills and training	42
Innovation	44
Future skills	45
Culture Change	47
Diversity in senior roles	48
Joining and progression	49
Retention and attribution	50
Caring responsibilities	58
Mobility and travel	59
Transport barriers	61
Travel and sustainability	63
Conclusion	65



Key Findings



Finding 1: Low Uptake of Training

There are more than 50 training providers serving the screen sector based in Wales, but only 29% of respondents in our survey had undertaken training in the past 18 months.

Finding 2: Skills and Training Challenges

Lack of knowledge of what training is available was the main reason given by respondents as the most significant challenge when accessing training, regardless of age, gender and time in industry.

Finding 3: Future Training Needs

Role specific training was listed as the largest area where training was identified for career progression, followed by business acumen. The most significant differences in training needs were based on gender, with women three times more likely to identify training related to work-based culture (training related to mental health, well-being and unconscious bias) than men.

Finding 4: Greater Investment Needed in Leadership and Management

23% of those surveyed in managerial or senior roles listed the need for more training in leadership skills, echoing concerns that career progression is often based on creative credentials, rather than managerial skills. This was mirrored by those in more junior roles looking to step up from technical and craft roles into supervision and management responsibilities.

Finding 5: The Importance of the Welsh Language to the Screen Sector in Wales

Wales has both a skilled bilingual workforce and monolingual workforce that are familiar with working on multilingual content. The screen sector in Wales plays a significant role in promoting and supporting the Welsh Language. 37% of respondents were fluent Welsh speakers, well above the national average of 18%. In addition, many non-Welsh speakers are also familiar with working on Welsh language content. 34% of respondents who listed having no Welsh language ability had worked on Welsh language content in the past 18 months.

Finding 6: Higher-Education and Barriers to Entering the Screen Sector

81% of those employed in the screen sector in Wales are educated to undergraduate degree level or equivalent, significantly higher than the UK national average 44% across all sectors. In addition, 21% are educated to post-graduate level.

Finding 7: Lack of Diversity in Senior Decision-making Roles

There is a notable lack of representation in senior roles, in terms of gender, ethnicity, long-term health conditions or disability in the screen sector. 51% of men surveyed held senior roles in comparison to 37% of women. 4.5% of total respondents have a long-term health condition or disability and held a senior role, and only 3% of total respondents came from Global Majority groups and held a senior role.

Finding 8: Poor Attrition Rates

52% of respondents had considered leaving the screen sector. The reasons given varied significantly based on gender, sexual orientation, ethnicity, age, caring responsibilities, and the screen sub-sector individuals worked in. While stress was listed as the main reason for poor attrition rates overall, toxic working conditions and long and inflexible working hours were particularly prevalent amongst female and LGBTQ+ respondents.

Finding 9: Retaining Women in the Screen Sector

More women than men have entered the Welsh screen sector within the past two years. However, some of the highest figures in our survey of those considering leaving the industry are amongst women aged between 31-50. 70% of those aged 31-40 and 67% of those aged 41-50 had contemplated leaving, listing work life balance and caring responsibilities as the main reasons.

Finding 10: Mental Health and Wellbeing

26% of respondents acknowledged that their job had a negative impact on their mental health, either agreeing or strongly agreeing with the statement.

Finding 11: A Highly Mobile Workforce

60% of respondents worked in more than one location within the last 18 months. 11% of respondents had worked in more than 10 locations in the same period. The highest number of locations recorded was 26.

Cardiff was the location most noted for work with 79% of those surveyed having worked in the city over the past 18 months. Second to Cardiff as the location, 32% worked in the UK but Outside Wales, with an additional 10% of respondents working overseas.

Finding 12: An Industry Driven by Passion and Creativity

Despite over half of respondents noting that they had considered leaving the screen sector, the most common reason given for remaining (27%) was their love and passion for working in this creative sector.

Finding 13: The Wheel of Transformational Change

21% who had considered leaving the screen sector highlighted changes to working conditions as a compelling reason to stay. The pandemic demonstrated that change was possible and highlighted the possibilities for alternative working practices. While our research shows that much is still needed to improve the working culture within the sector, the impact of implementing change is a positive one.



Introduction



Introduction ■

The screen sector in Wales is both economically and culturally significant.

Figures from Creative Wales note how in 2021 alone, the Welsh screen sector saw a turnover of £575 million, a 36% increase from the year before³. Culturally, the creative industries play a significant role in representing and promoting Welsh culture, talent, and the Welsh language. Despite this, the screen sector both in Wales and the wider UK has come under scrutiny in recent years for its workforce attrition rates, continued lack of diversity, long working hours, and poor workplace culture and its subsequent impact on wellbeing and mental health.

As part of Media Cymru, the University of South Wales is developing and co-delivering an innovative skills programme linking education, industry, and infrastructure to build a sustainable talent base for the region's screen sector. Research plays an integral part of this work and in October 2022 we launched our first Wales-wide Screen Workforce Survey.

According to the Inquiry into Film and Major Television Production in Wales⁴ by the Welsh Government, "we are blessed with a skilled workforce, but in the absence of good data, we don't know what skills we need to fuel future growth". To deliver an innovative skills programme, we first need to understand the nuances of the Welsh screen sector from the perspective of those working within it – what sets the Welsh workforce apart from the rest of the UK and what that landscape looks like in distinct parts of Wales.

³ Welsh Government, That's a wrap on another busy year for film and TV in Wales (2022) <<https://www.gov.wales/thats-wrap-another-busy-year-film-and-tv-wales>> [accessed 1 August 2027]

⁴ National Assembly for Wales, Inquiry into Film and Major Television Production in Wales (2019) <<https://senedd.wales/media/ofwf5dxx/cr-ld12524-e.pdf>> [accessed 1 August 2023]

The University of South Wales (USW) has an excellent record of accomplishment on delivering industry focused research of this kind. Recent publications include Screen Work 2020⁵(funded by Clwstwr), the Screen Survey Wales 2021⁶(funded by USW and Creative Wales) and the Games Survey Wales 2021⁷ (funded by Clwstwr).

To sustain this significant and growing sector, we need to not only nurture new talent but also focus on retaining and supporting those already working within the sector. A considerable amount of academic and public policy literature now exists that highlights the need to focus on talent retention alongside initiatives to support new entrants into the screen sector.

According to the Film and TV Charity 2022 report *Absent Friends: Scaling the film and TV industry's retention problem*⁸, the UK screen sector is facing a crisis in talent retention. As noted in the Creative Industries Policy and Evidence Centre's (PEC) 2023 report the *Good Work Review*⁹ concerns around poor workplace practices and culture have been highlighted "with evidence of a lack of respect, dignity, bullying and harassment" across the creative industries along with long working hours and demanding schedules having negative impacts on the health and wellbeing of the workforce.

The focus of this report is to look specifically at the Welsh screen sector workforce to gain a better understanding of this important industry, from the perspective of those working in it. This report takes a holistic approach to the screen sector, highlighting the diversity of roles and subsectors including those working in TV, film, post-production, games, animation, and commercial production.

⁵ Faye Hannah and Ruth McElroy, *Screen Work 2020* (Cardiff: Clwstwr, 2020) <https://clwstwr.org.uk/sites/default/files/2021-01/Screen_Work_2020_ENG_0.pdf> [accessed 1 August 2023]

⁶ Helen Davies and Ruth McElroy, *Screen Survey Wales 2021* (Cardiff: Centre for the Study of Media and Culture in Small Nations, 2022) <https://uswvarious1.blob.core.windows.net/uswvarious-prod-uploads/documents/ScreenSurveyWales_ISBN.pdf> [accessed 1 August, 2023]

⁷ Richard Hurford and Ruth McElroy, *Games Survey Wales 2021* (Cardiff: Clwstwr, 2022) <https://clwstwr.org.uk/sites/default/files/2022-04/Games%20Survey%20Wales%202021_0.pdf> [accessed 1 August 2023]

⁸ David Steele, *Absent Friends: Scaling the film and TV industry's retention problem* (London: Film and TV Charity, 2022) <<https://filmtvcharity.org.uk/wp-content/uploads/2022/06/Film-and-TV-Charity-Retention-Report.pdf>> [accessed 1 August 2023]

⁹ Heather Carey, Lesley Giles and Dave O'Brien, *The Good Work Review: Job quality in the Creative Industries* (London: Creative Industries Policy and Evidence Centre, 2023) <<https://creative-pec.files.svdcn.com/production/assets/publications/PEC-GWR-Job-quality-in-the-Creative-Industries-v7.pdf>> [accessed 1 August 2023]

Methodology





In August 2022, the University of South Wales hosted a roundtable discussion with academics, training providers, government, industry, and Media Cymru partners to discuss innovative skills programmes that link education, industry, and infrastructure.

Sharing insights from the University of South Wales' previous research, exploring the skills challenges and training needs of the screen sector across Wales, and hearing about the important work being conducted elsewhere in the UK helped shape and inform our research design. Having previously focused on freelancers, employers, and training providers, the team felt that the research needed to be extended to all individuals working in the screen sector. In order to build a sustainable talent pool for the region's screen sector, we first need to establish a robust evidence base.

As Media Cymru is a 5-year project our aim is to create a mechanism for longitudinal research investigating the screen sector workforce in Wales over multiple years. Through running an annual workforce survey, we hope to capture and track changes as they occur and identify areas of persistent difficulties for those working within the Welsh screen sector for the duration of the Media Cymru project.



Online surveys

With a workforce made up of freelancers, those on fixed-term contracts, permanent and part-time employees, online surveying was decided upon as a means of meeting the criteria of coping with split samples and longitudinal goal of capturing data, and identifying any changes, over multiple years¹⁰.

Online surveys have their strengths in their speed, flexibility, ease of completion, question diversity and the ability to reach a large sample^{11,12}. The survey ran for over three months, opening on 18th October 2022, and running until the 31st January 2023. The deadline was extended slightly to accommodate the Christmas period and ensure maximum engagement with as many of the Welsh screen workforce as possible.

In total, there were 424 unique responses. In order to be included in this survey, respondents needed to be either living or working in Wales during the previous 18 months.

The decision was made to let respondents self-identify as freelancers or employees, then the use of branching questions allowed for permanent employee and freelancer responses to be easily filtered and separated. Such measures allowed for a single survey format to cover a range of more statistical demographic questions, including gender identity, ethnicity, work location, age and caring responsibilities, as well as more qualitative responses¹³ with regards to attitudes to future ambitions, training priorities, workplace challenges and issues related to the impact of screen work on work/life balance, mental and physical health.

¹⁰. Joel R. Evans and Anil Mathur, 'The Value of Online Surveys', *Internet Research*, 15.2 (2005) 195-219 <<https://doi.org/10.1108/10662240510590360>>

¹¹. Joel R. Evans and Anil Mathur, p. 7.

¹². Martine Van Selm and Nicholas W. Jankowski, 'Conducting Online Surveys', *Quality and Quantity*, 40 (2006), pp. 435-456 <<https://doi.org/10.1007/s11135-005-8081-8>>

¹³. Virginia Braun and others, 'The online survey as a qualitative research tool', *International Journal of Social Research Methodology*, 24 (2021), pp. 641-654 <<https://doi.org/10.1080/13645579.2020.1805550>>

Survey length is an important consideration to ensure engagement and completion rates are as high as possible¹⁴. As a foundation, the survey design was based on the previous work conducted for Screen Survey Wales 2021¹⁵, with necessary adjustments to reflect a focus on the workforce, rather than training providers and employers. Initial iterations were subjected to internal sense-checking and testing, as well as piloted via Media Cymru stakeholders.

In designing questions relating to demographic characteristics, care was taken to ensure all questions allowed open-ended categories in responses, to give participants more agency over how they define themselves¹⁶ including an option to self-describe, and an option to prefer not to say. This was especially salient in relation to categories including, but not limited to, gender identity, sexual orientation or ethnicity. Though this approach can result in a more unwieldy and cumbersome dataset, reliant on additional coding, it is richer for the consideration, and helps centre the participants' voices.

The final survey was scaled down to minimise fatigue. The survey was made up of 42 compulsory questions with an additional 28 branching questions – 12 questions allowing respondents to self-describe or expand on answers and 16 attitudinal scale questions.

All data collection was subject to approval by a rigorous Research Ethics and Consent Panel at the University of South Wales. This research is also governed by Media Cymru's overarching Research Ethics Framework¹⁷. The surveys were available for completion electronically online and hosted by Jisc's survey tool¹⁸.

The surveys were available in both Welsh and English. Of the 424 respondents, 353 completed the survey in English and 71 in Welsh. A social media campaign over multiple platforms was launched to maximise the reach of the survey, with all communications published bilingually. Companies working in the screen sector were also identified through detailed desk research. Utilising the FAME Database¹⁹ through Bureau Van Dijk, we were able to build a list of companies operating in the screen sector in Wales.

¹⁴. Virginia Braun, Victoria Clarke, Elicia Boulton, Louise Davey & Charlotte McEvoy, p. 8.

¹⁵. Helen Davies and Ruth McElroy, p. 5.

¹⁶. Virginia Braun, Victoria Clarke, Elicia Boulton, Louise Davey & Charlotte McEvoy, p. 8.

¹⁷. Media Cymru, Research Ethics Framework (Cardiff: Media Cymru, [n.d.]) <<https://media.cymru/research-ethics-framework/>> [accessed 1 August 2023]

¹⁸. JISC, Online Surveys (London: JISC, [n.d.]) <<https://www.onlinesurveys.ac.uk/>> [accessed 1 August 2023]

¹⁹. Bureau van Dijk Electronic Publishing, Fame (London: Bureau van Dijk Electronic Publishing, [n.d.]) <<https://www.bvdinfo.com/en-gb/privacy-policy>> [accessed 1 August 2023]

FAME offers comprehensive information on public and private companies in the UK and Ireland. Their economic activities are classified using Standard Industrial Classification of Economic Activities (SIC) codes²⁰.

For the purpose of our research, we identified the following SIC codes that directly relate to our definition of screen sector:

582 - Software publishing
591 - Motion picture, video and television programme activities
592 - Sound recording and music publishing activities
601 - Radio broadcasting
602 - Television programming and broadcasting activities
6201 - Computer programming activities
6202 - Computer consultancy activities
6209 - Other information technology and computer service activities
73110 - Advertising agencies
90 - Creative, arts and entertainment activities

Cross referencing with information available through Companies House and web searches, we were able to cleanse the dataset of companies that did not meet the inclusion criteria. Where contact details were publicly available (through Companies House or company websites) we were able to share our online survey to ensure the widest possible reach.

While reaching those on full/part-time contract and fixed term contracts was achieved directly through employers, alternative considerations were needed for reaching freelancers. In addition to sharing the survey through freelancer groups on social media platforms, the survey was also sent to all freelancers registered on the Creative Wales Crew Database²¹. The trade union Bectu also shared the survey with its members.

Completed surveys were held securely on the electronic platform, and password protected. The master data file was kept securely on an internal University of South Wales shared drive.

²⁰. Companies House, Nature of business: Standard Industrial Classification codes (London: UK Government, [n.d.]) <<https://resources.companieshouse.gov.uk/sic/>> [accessed 1 August 2023]

²¹. Creative Wales, Crew, Facilities and Accommodation (Cardiff: Welsh Government, [n.d.]) <<https://www.creative.wales/filming-wales/crew-facilities-and-accommodation>> [accessed 1 August 2023]



Data analysis and thematic approach

As a means of identifying key patterns and themes in our data, a thematic approach has been taken. As this research focuses on understanding the challenges facing those working in the screen sector in Wales, it was important to utilise a methodology that allows for a complex unpicking of data in relation to variables such as age, gender, ethnicity, access and so on.

Working within the aims of Media Cymru and the University of South Wales' specific skills and training remit, three key themes were identified, namely Characteristics of the Welsh Workforce, Skills and Training, and Culture Change. These themes will now be addressed in more detail, starting with the Characteristics of the Welsh Workforce.

Characteristics of the Welsh Workforce





A Diverse Demographic

As the first Wales-wide survey looking specifically at the Welsh screen sector workforce, our aim is to provide a dataset that focuses on those living and working in Wales.

In order to identify areas of persistent difficulties for those working within the Welsh screen sector, we first need to position our findings within a Welsh context. To achieve this, we will be drawing on Wales-focused statistics from the ONS 2021 census²².

The BFI has noted that “the screen sector’s [...] workforce does not reflect the diversity of the UK’s population as a whole”²³. In characterising the Welsh screen sector this first section will look at workforce diversity, in terms of ethnicity, gender identity, sexual orientation, disability, age, employment status and freelancers, and the Welsh language.

²² Office for National Statistics, Census (London: UK Government, [n.d.]) <<https://www.ons.gov.uk/census>> [accessed 1 August 2023]

²³ CAMEo, Workforce Diversity in the UK Screen Sector: Evidence Review (Leicester: CAMEo Research Institute, 2018) <<https://core-cms.bfi.org.uk/media/1799/download>> [accessed 1 August 2023]



Ethnicity

Global Majority		6.8%
Black/African/Caribbean/Black Welsh or British	3	
East Asian/East Asian Welsh or British	2	
South Asian/South Asian Welsh or British	2	
Arab/Arab Welsh or British	1	
White and Asian	4	
White and Black African or Caribbean	3	
Any other multiple ethnic background	11	
Any other single ethnic background	3	
White		91.5%
White Welsh, Scottish, English, Northern Irish or British	362	
White Gypsy or Irish Traveller	0	
White Irish	5	
Other White background	21	
Prefer to self-describe	2	0.5%
Prefer not to say	5	1.2%

Table 1. Ethnic Background

7% of respondents came from the Global Majority, or backgrounds other than white British/Irish, or other white backgrounds, 0.5% preferred to self-describe and 1% preferred not to say. In line with the work of Rosemary Campbell-Stephens²⁴, the term Global Majority is used to refer to people who are Black, Asian, Brown, dual-heritage, mixed or of multiple ethnic groups, indigenous to the global south, and or have been racialised as 'ethnic minorities'. The full list of categories included in the survey are listed in Table 1 with respondents also able to self-describe.

²⁴. Rosemary Campbell-Stephens, Global Majority; Decolonising the language and Reframing the Conversation about Race (Leeds: Leeds Beckett, 2020) <<https://www.leedsbeckett.ac.uk/-/media/files/schools/school-of-education/final-leeds-beckett-1102-global-majority.pdf>> [accessed 1 August 2023]

In the 2021 UK Census 93.8% of the Welsh population identified within the largest high-level category, “White”²⁵. At a national level this would demonstrate proportionate representation, however, when this figure is unpicked further, we see large disparities when it comes to representation in the sector.

Of the 22 Welsh counties, Cardiff has the highest total population from the Global Majority at 20.8%²⁶. Cardiff has a rich multicultural history and continues to grow and be recognised for its ethnic diversity. However, the booming screen sector in the capital currently does not reflect the diversity of the demographic. Almost half (206) of respondents listed Cardiff as their main place of residence, only 7.2% of the total number of respondents living in Cardiff came from the Global Majority.

	Census 2011	Census 2021	This Survey
Asian, Asian British or Asian Welsh	8.1%	9.7%	0.5%
Black, Black British, Black Welsh, Caribbean or Africana	2.4%	3.8%	1.0%
Mixed or Multiple ethnic Groups	2.9%	4.0%	5.3%
White	84.7%	79.2%	85.9%
Other ethnic groups	2.0%	3.3%	7.3%

Table 2: Comparison of Ethnicity data for Cardiff taken from 2011 & 2021 Census and this survey

Despite the low proportion of ethnic diversity in the screen sector in Wales, there is some evidence to suggest that inroads are being made to encourage those from Global Majorities into the sector. Of the 68 respondents who had entered the screen sector in Wales in the past five years, 10.1% were from the Global Majority.

²⁵ Welsh Government, Ethnic group, national identity, language and religion in Wales: Census 2021 (Cardiff: Welsh Government, 2022) <<https://www.gov.wales/ethnic-group-national-identity-language-and-religion-wales-census-2021-html>> [accessed 1 August 2023]

²⁶ Office for National Statistics, How life has changed in Cardiff: Census 2021 (London: UK Government, 2023) <<https://www.ons.gov.uk/visualisations/censusareachanges/W06000015/>> [accessed 1 August 2023]

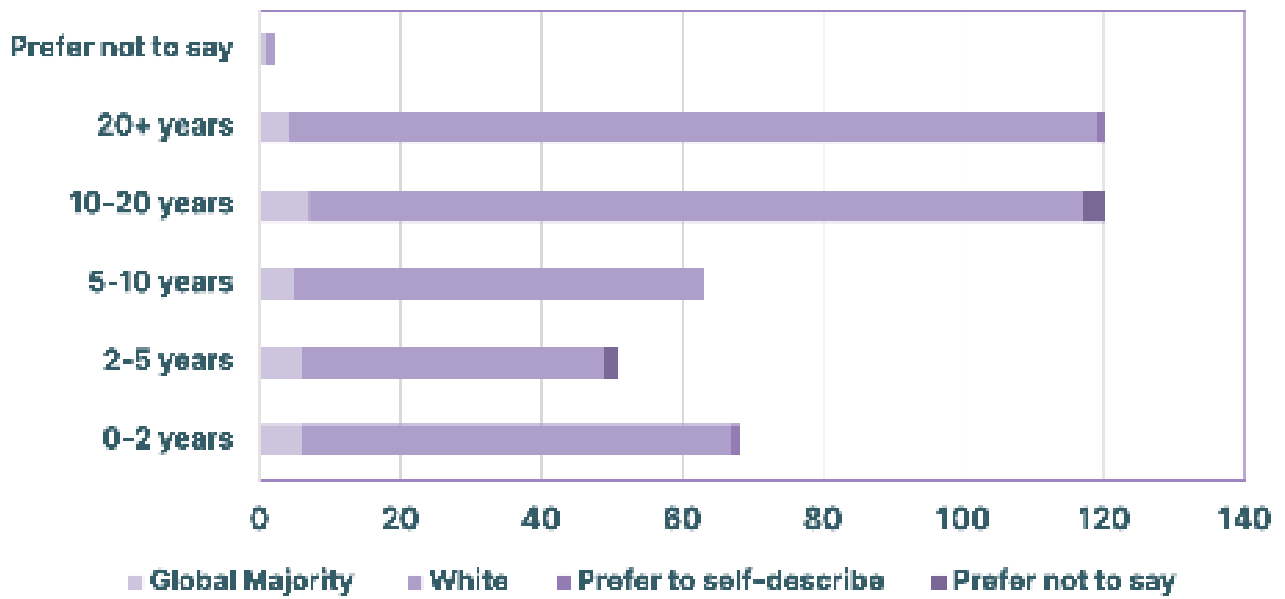


Chart 1. Time in Industry filtered by Ethnicity



Gender and Gender Identity

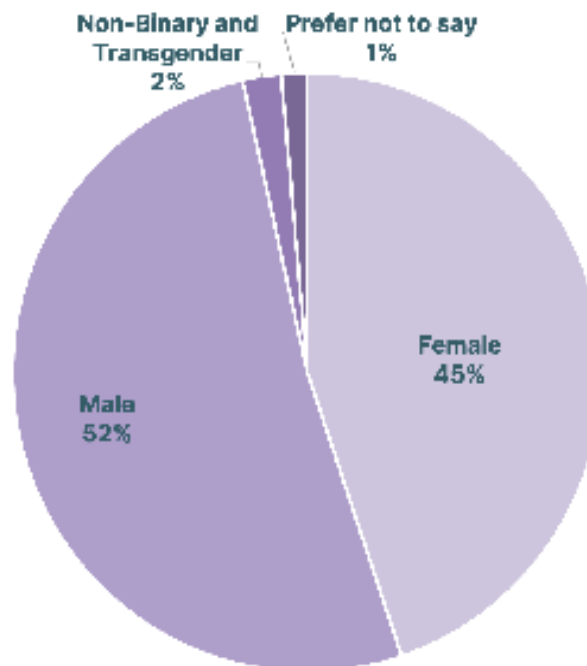


Chart 2. Gender

Respondents were asked to self-describe their gender identity. In line with the guidelines set by the national health and wellbeing charity LGBT Hero²⁷ the umbrella term 'non-binary' was used for those with gender identities that did not conform to traditional binary beliefs. For the purposes of this research and due to the low number of transgender respondents (one transgender man and one transgender woman), we have grouped Non-binary and Transgender together.

Within the screen sector there are clear disparities when it comes to gender and industry sub-sectors. The University of Leicester's diversity report for the BFI²⁸ highlighted a pronounced lack of workforce diversity, and persistent lack of equal workforce participation, across the sector. Our research found that women were particularly well-represented in Film and TV (45%) and Animation (45.7%) but less so in Post-production (34.1%), Games (28.6%), Commercial (27%), and Visual Effects (26.9%). Due to the low figures relating to non-binary and transgender people (2.1%) we are limited in what conclusions can be drawn, but Games (5.7%) and Animation had the highest percentage overall of non-binary and transgender people (6.5%) working in those sub-sectors.

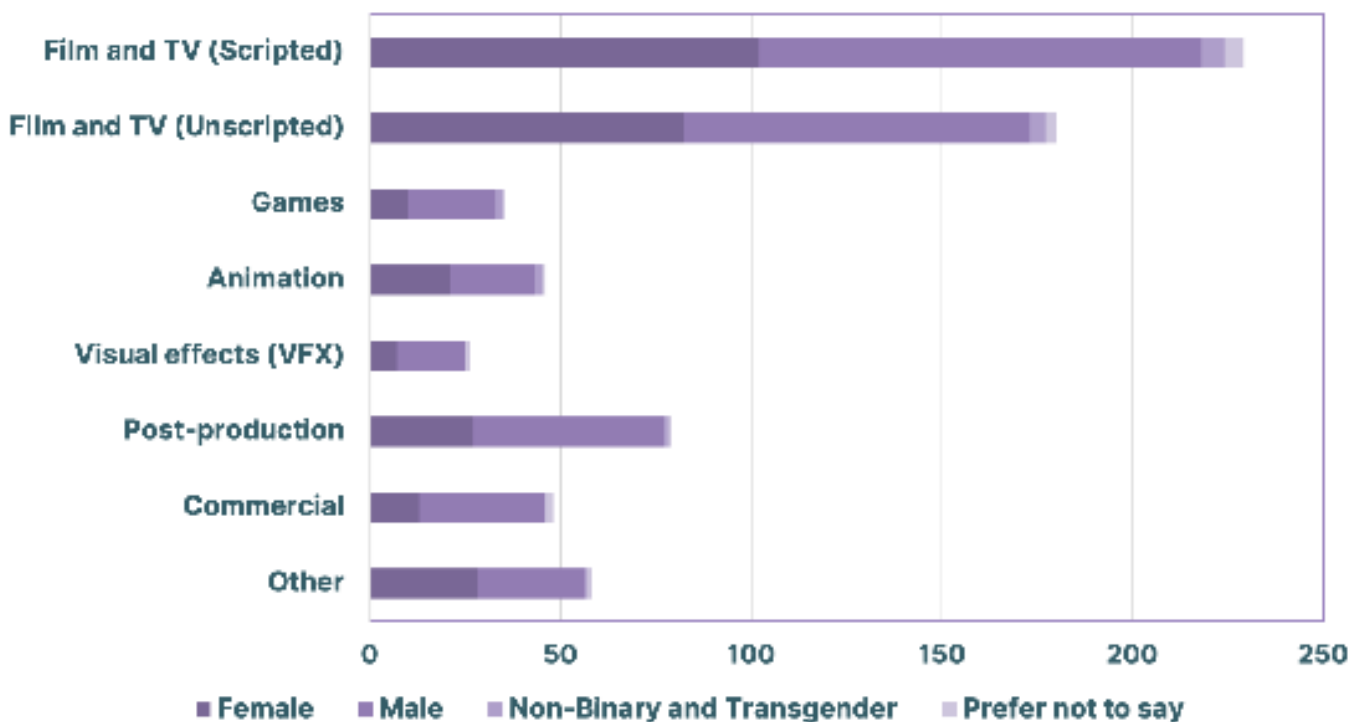


Chart 3: Number of respondents in gender categories in each screen sub-sector

²⁷ LGBT Hero, Being non-binary (London: LGBT Hero, [n.d.]) <<https://www.lgbthero.org.uk/being-non-binary>> [accessed 1 August 2023]

²⁸ CAMEo, p. 11.

More women than men have entered the screen sector in Wales within the last two years, and over two thirds of non-binary respondents had entered the screen sector in the past five years.

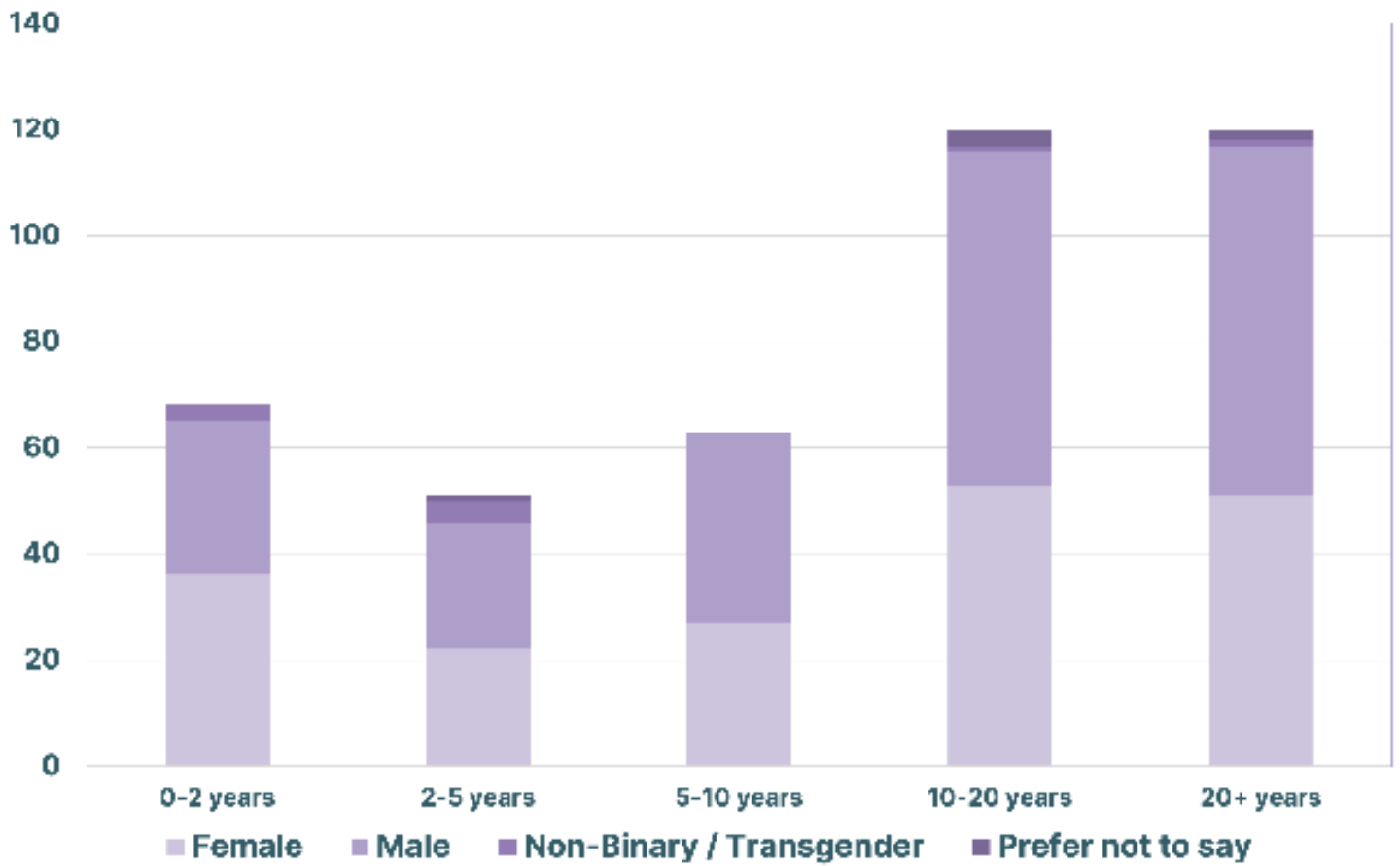


Chart 4: Number of respondents in gender categories broken down by time spent in the screen sector



Sexual Orientation

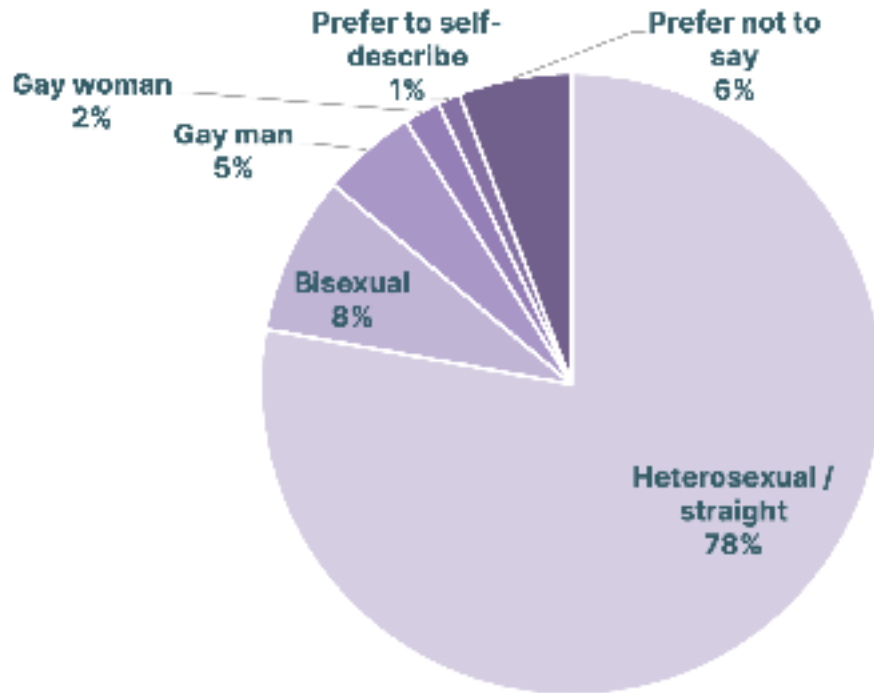


Chart 5: Sexual Orientation

Prior research by the University of Leicester for the BFI highlighted that “diversity characteristics related to sexual orientation were seldom explored in detail”²⁹. 2021 Census figures for Wales show 89.4% of the Welsh population identifying as heterosexual, compared with 78% in our survey. The aim of this research is to provide a holistic view of the screen sector workforce and understand diversity characteristics relating to sexual orientation. The graph below shows that proportionally there are higher number of people from the LGBTQ+ community working in the screen sector, but a more detailed investigation into understanding this important demographic remains vitally important.

²⁹ CAMEo, p. 11.

	Census 2021	This Survey
Hetrosexual	84.4%	78%
Gay or Lesbian	1.5%	7%
Bisexual	1.2%	8%
Self-described	0.3%	1%
Prefer not to say	7.6%	6%

Table 3: Sexual orientation, comparison between UK Census 2021 data and this survey



Disability and Long-term Health Conditions

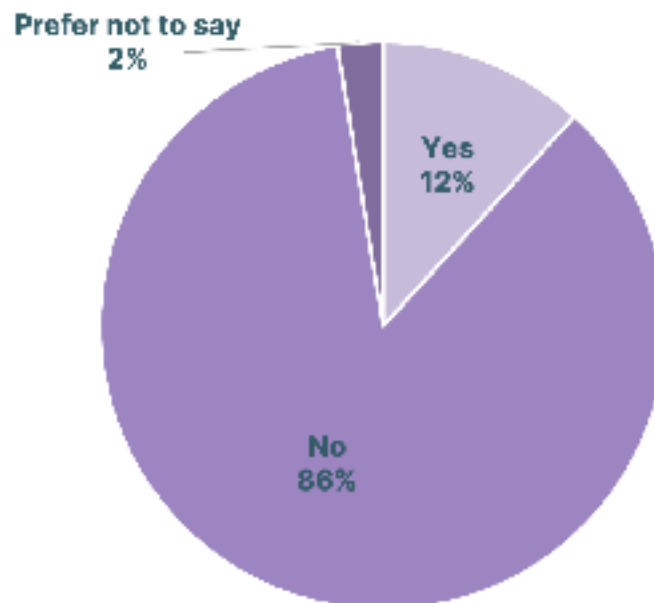


Chart 6: Respondents that identify as having a long-term health condition or being disabled

Results reveal a significant under-representation of disabled people, and those with long-term health conditions, in the screen sector in Wales. As of 2021, 21.1% of the population in Wales are disabled³⁰ in comparison to 11.8% of respondents who considered themselves to be disabled, or with a long-term health condition. Respondents with long-term health conditions or disabilities were four times less likely to be working as freelancers in the screen sector, indicating that more support is needed in making the working environment accessible.



Age

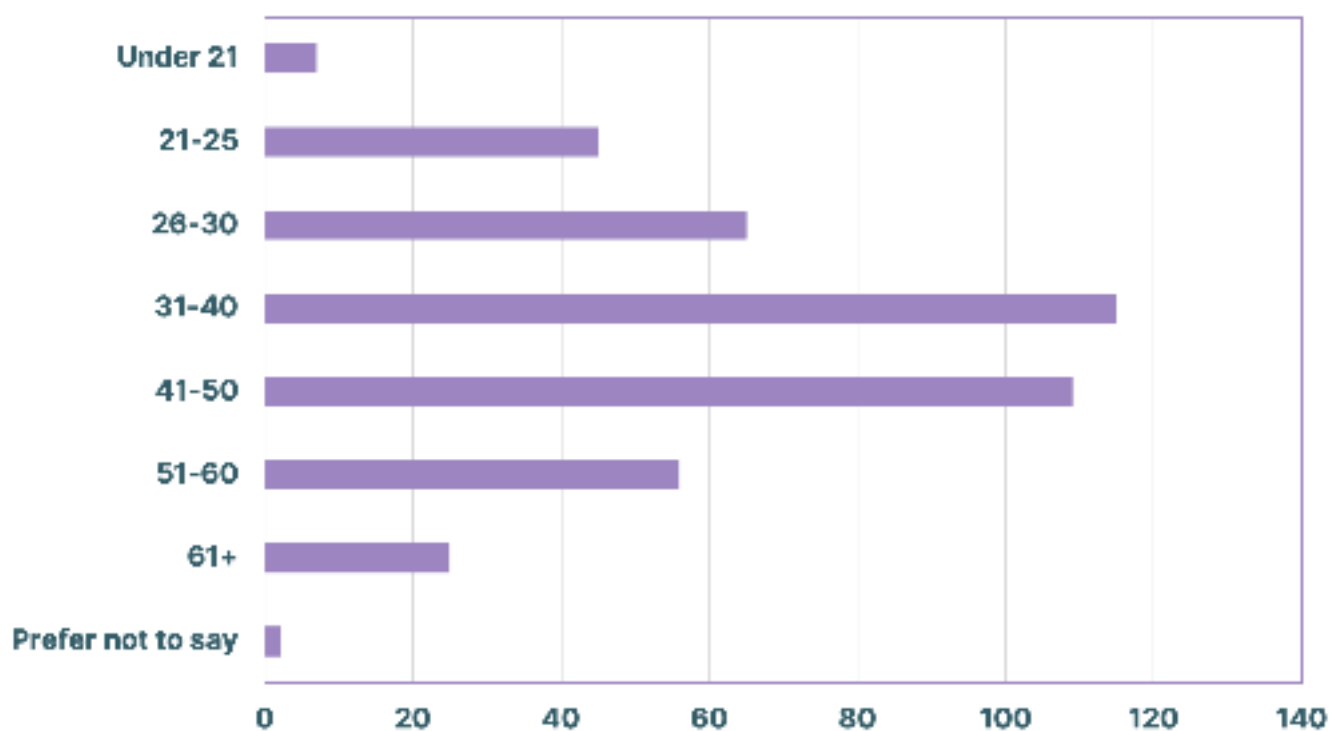


Chart 7: Age breakdown

³⁰2021 Office for National Statistics, Disability, England and Wales: Census 2021 (London: UK Government, 2023) <<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/disabilityenglandandwales/census2021>> [Accessed 1 August 2023]

80.4% of those working in the screen sector in Wales were under the age of 50. With as many as 35,000 of the sector's experienced workforce now 'missing' from the screen sector across the UK³¹, these figures reflect a wider need to consider retention and attrition rates when addressing issues with skills provision. While the highest level of new entrants (based on years in industry) into the screen sector were those aged between 21-25 (44.1%) and 26-30 (20.6%), 11.8% of new entrants were aged between 41-50.



Employment

The screen sector is also characterised by a wide variety of forms of employment. 44% of respondents were employed on a full-time basis, 6% on a fixed-term contract, 5% on a part-time basis, 41% were listed as freelancers with 3% currently not working and 1% listing other.

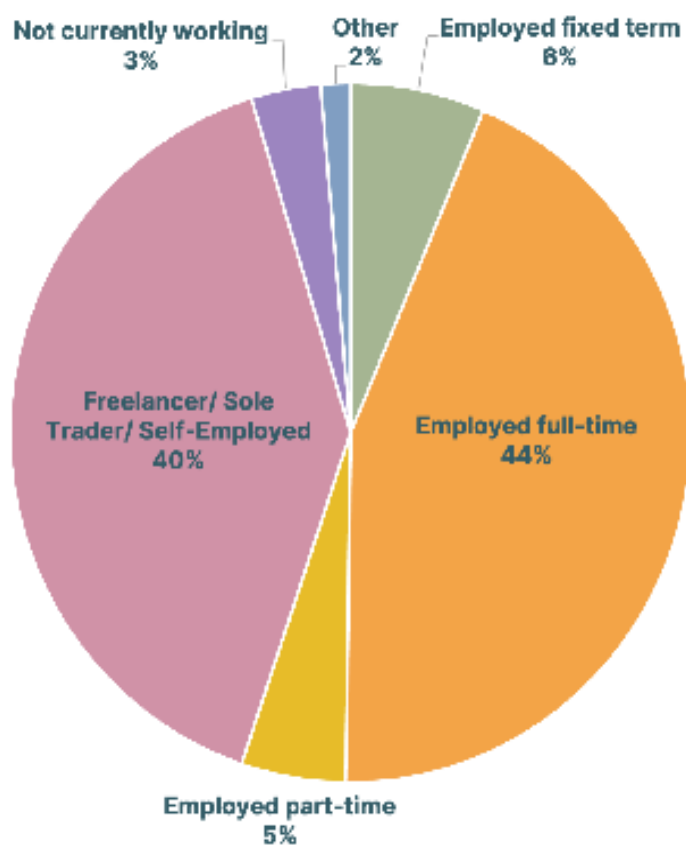


Chart 8: Employment type

³¹ David Steele, p. 6

Freelance work was the second most common reported form of employment after full-time employees among respondents. Support for freelancers across areas including union representation, and skills and training provision has been a source of concern, the Creative Industries Policy and Evidence Centre's (PEC) Good Work Review³² deciding to classify freelance workers across the creative industries as an 'under-represented group.'

36.3% of female respondents worked as freelancers, in comparison with 42.9% of male, and 42.8% non-binary respondents. Men were more likely to work as a freelancer or sole trader than women, where women were more likely to hold fixed term positions, or work part-time.

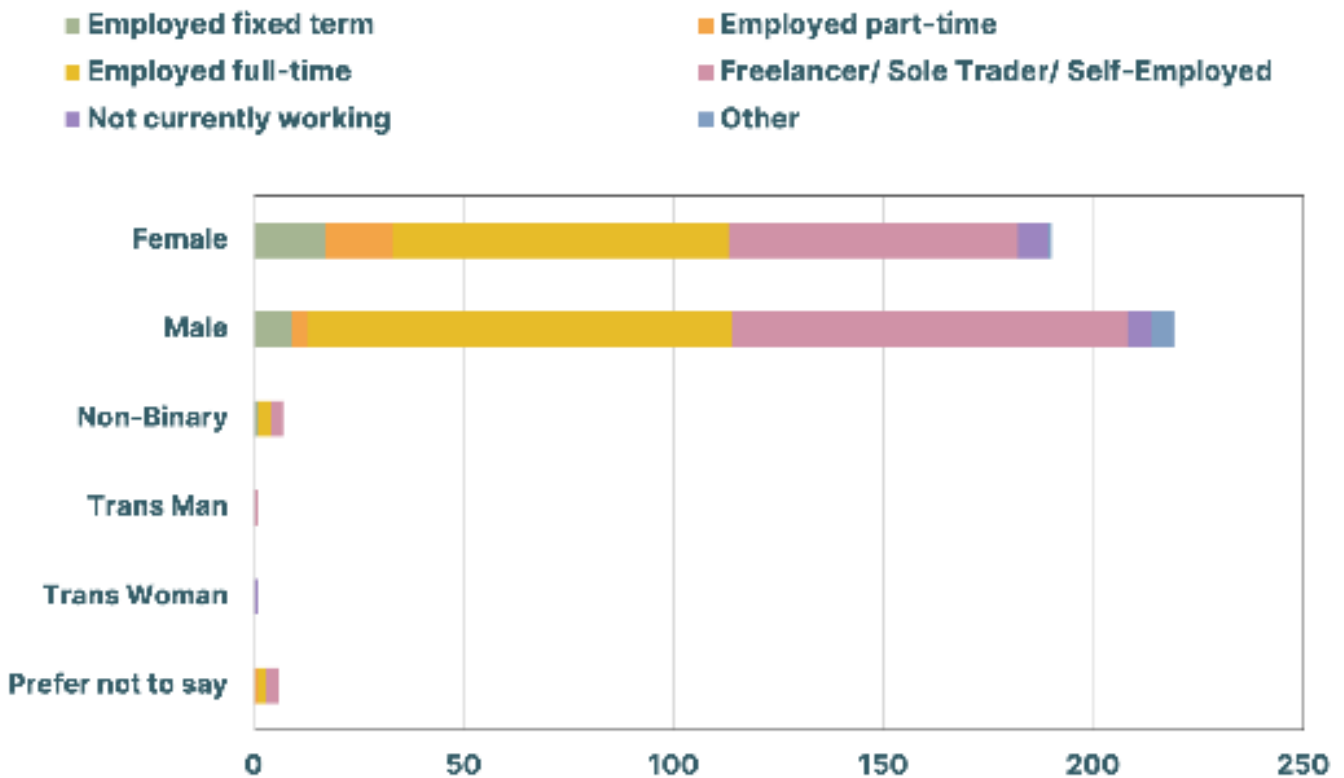


Chart 9: Breakdown showing gender and employment type

³² Heather Carey, Lesley Giles and Dave O'Brien, p. 6.



Sub-sector workforce

The largest group of respondents worked in Scripted Film and TV, closely followed by Unscripted, with a significant proportion working in both. This is followed by Post-production, Commercial content, Animation, Games and VFX. 58% of respondents worked in a single sub-sector, indicating a significant number of respondents work in multiple sub-sectors.

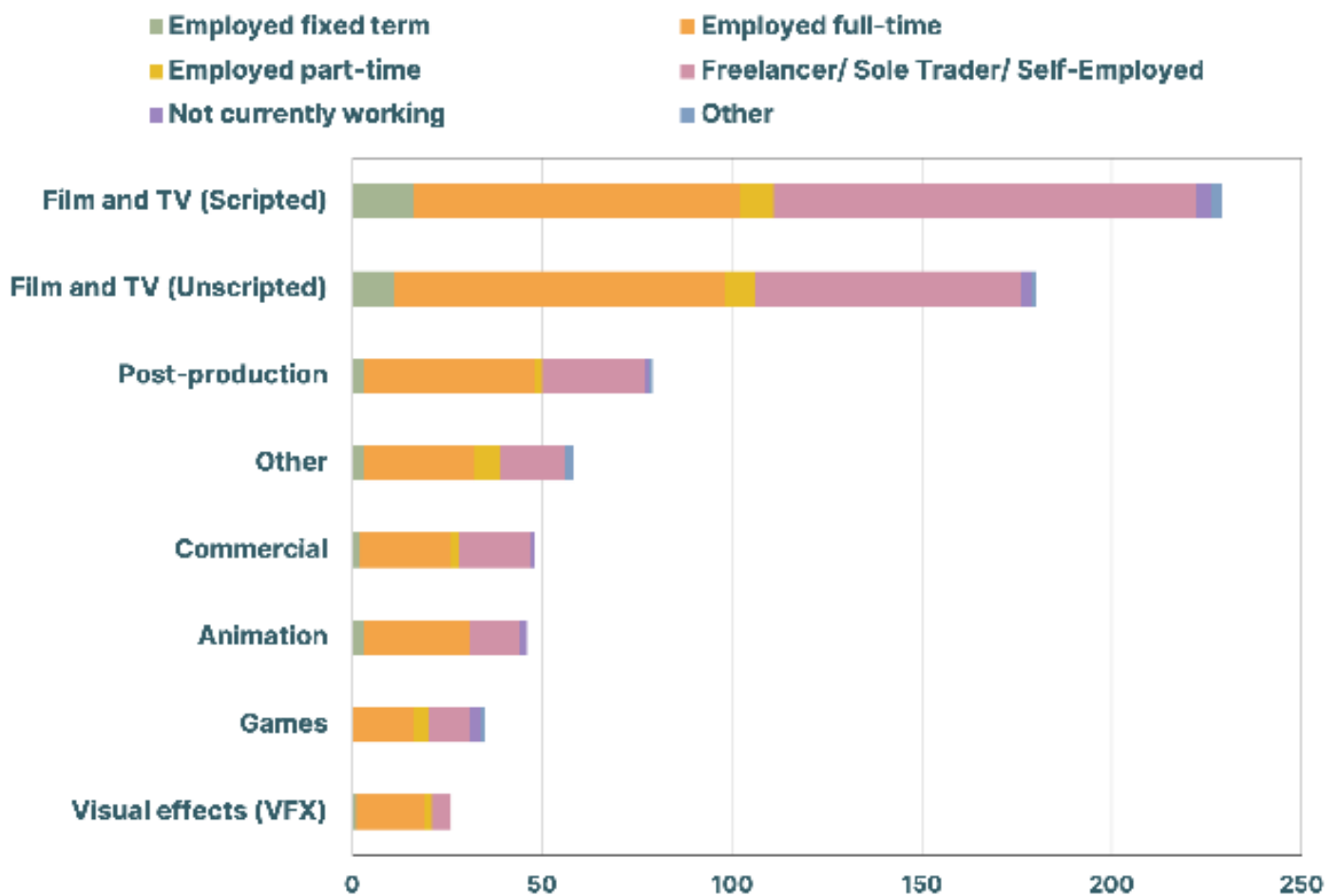


Chart 10 : Breakdown showing screen sub-sector and employment type



Welsh Language

Welsh language media remains vital to the growth and maintenance of Welsh, a minority language. The establishment of S4C, in 1982, is widely regarded as a significant milestone in revitalising minority languages in Europe and across the world³³. S4C was the first substantial television channel operating in a minority language. As a result of this, the PEC concluding that “Wales has a highly-skilled, bilingual TV and film workforce creating world-class content from across Wales.”³⁴

17% of respondents completed the Welsh language version of the survey, however 37% of respondents consider themselves fluent Welsh speakers, well above the national average of 18%. An additional 6% listed their language ability as intermediate and a further 12% listing themselves as new speakers (learners). The screen sector in Wales is home to a skilled bilingual workforce, setting Wales apart from the rest of the UK, and is a vital component in the continued growth and health of the language.

³³ Aberystwyth University Mercator Institute, Written Evidence for the Welsh Affairs Select Committee (London: UK Parliament, 2010) <<https://publications.parliament.uk/pa/cm201011/cmselect/cmwelaf/writev/s4c/s4c20.htm>> [accessed 1 August 2023]

³⁴ Heather Carey, Lesley Giles and Dave O’Brien, p. 6.

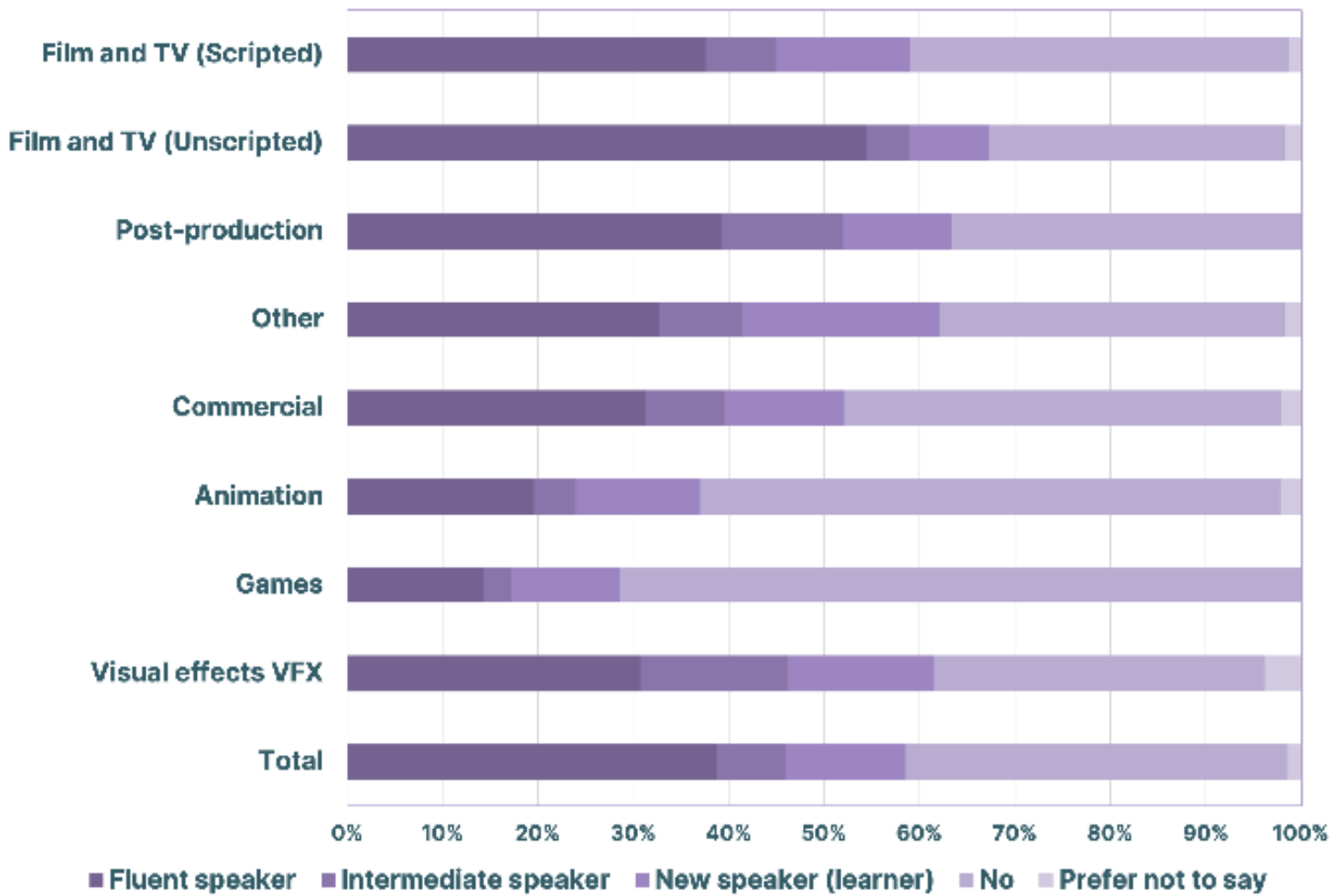


Chart 11: Breakdown of Welsh language ability and screen sub-sectors

54% of fluent Welsh speakers work in unscripted film and TV, a further 13% listed being either an intermediate or new speaker in this genre. The second highest is in post-production with 39% fluent speakers and 24% intermediate or new speakers, this is closely followed by scripted TV and film with 38% fluent, and 24% intermediate or new speakers.

The genre with the lowest percentage of Welsh language speakers is games, with 71% listing no Welsh language ability, second to this is animation with 61% listing no Welsh language ability. 50% of those working in animation who listed having no Welsh language ability had worked on some Welsh language content in the past 18 months compared with 16% working in games. Overall and across all genres surveyed, 34% of non-Welsh speakers had worked on some Welsh language content in the past 18 months. The integration of Welsh and non-Welsh speaking collaboration on bilingual content is encouraging, Wales is uniquely positioned in having a workforce that is familiar with working bilingually - an attribute that needs to be celebrated.

In the animation and games industry, co-productions are often international and multilingual, with language considerations a vital part of a successful delivery. Recently, some of the biggest hits in the world of TV and film have come from non-English speaking countries. Netflix figures estimate that the platform features content in over 60 languages, including Welsh with the recent acquisition of Welsh only drama *Dal y Mellt/Rough Cut* (produced by Vox Pictures), with 80% of Netflix users claiming to use subtitles at least once a month³⁵.

Game Survey Wales 2021³⁶ highlighted the oversight on the part of the Welsh Government's *Cymraeg 2050 Welsh Language Strategy*³⁷ in ignoring the potential contribution of video games in reaching a broad audience with engaging Welsh language content, and the same is true when extended to the entirety of the screen sector. As such, the Welsh screen sector offer a cultural, as well as economic, potential to Wales as a whole, providing not only a springboard and platform for the prosperity of the Welsh language, but as source of content with the potential for true global reach.

³⁵The Week, Why more TV viewers are switching on subtitles (Bath: The Week, 2022) <<https://www.theweek.co.uk/news/955356/why-have-we-all-switched-on-the-subtitles>> [accessed 1 August 2023]

³⁶Richard Hurford and Ruth McElroy, p. 5.

³⁷Welsh Government, *Cymraeg 2050, A million Welsh Speakers* (Cardiff: Welsh Government, 2017) <<https://www.gov.wales/sites/default/files/publications/2018-12/cymraeg-2050-welsh-language-strategy.pdf>> [accessed 1 August 2023]



Skills and Training .

5



In 2022 the University of South Wales undertook a review of the skills and training providers from across Wales. This research revealed an abundance of courses aimed at both new entrants and existing talent.

There are currently more than 50 training providers that serve the screen sector based in Wales, but only 29% of respondents in our survey had undertaken training in the past 18 months. The highest number of respondents undertaking training were those in fixed term employment standing at 48%, with the lowest figure, 26% amongst freelancers. Age, gender and time in industry all played significant roles in whether people engaged with training.

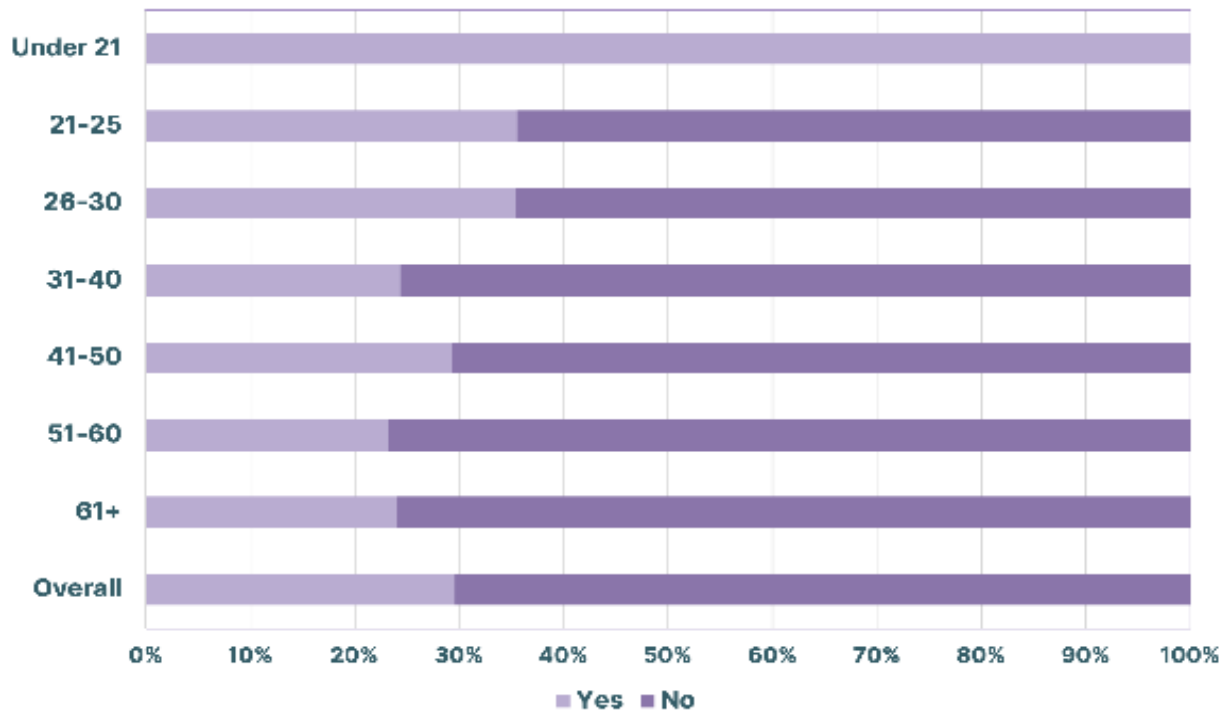


Chart 12: Breakdown showing the take up of training in each age group

Younger respondents were most likely to have undertaken training in the past 18 months with 100% of those under 21, 36% of those aged 21-25 and 35% of those aged 26-30 undertaken training. Figures continue to drop for those aged 31 and above with those aged 51-60 the least likely to have undertaken training with only 23% having done so. More female and non-binary respondents had undertaken training than male respondents with 36% of females, 57% of non-binary compared with 23% of male respondents.

The key pattern here is the drop off in training between the ages of 31-40, a key career point where many will be looking to step up into leadership roles. More professional development is needed, not least to ensure individuals arrive in leadership roles properly equipped to deal with management responsibilities.



Chart 13: Barriers to undertaking training

While there were a number of disparities in responses about undertaking training the main reason given by respondents across the board regardless of age, gender and time in industry as the biggest challenge when accessing training was knowledge of what training is available. The second highest response was the cost followed by location of training. Other barriers were noted including childcare, which was more notable amongst women.

The provision of training is key in addressing skills gaps in the creative industries. Schemes such as the Criw Production courses³⁸ in both south and north Wales and Culture Connect Wales aimed at new starters, have been extremely successful in supporting new talent into the screen sector.

³⁸ Sgil Cymru, Previous Courses (Cardiff: Sgil Cymru, [n.d.]) <<https://www.sgilcymru.com/en/about-sgil-cymru/>> [accessed 1 August 2023]

The screen sector is made up of a highly skilled and creative workforce. Recent publications looking at skills gaps in the sector have noted significant shortages when it comes to leadership and management^{39,40}. Research conducted on behalf of Creative & Cultural Skills and Arts Council England (ACE) found that “recruiting senior staff with both a creative background and leadership skills presents a particular challenge”⁴¹ to the sector.

Respondents were also asked a series of attitudinal questions about skills and training. From the data below there is an overall confidence in individuals to perform in their current roles, and a broadly positive view of employers’ support in terms of career development. However, awareness of, and access to, training and mentoring opportunities is less so, highlighting a continued need to link workers to training opportunities, and raise the profile and visibility of currently existing training initiatives in Wales.

	Most Confident	Confident	Neutral	Not Confident	Least Confident
I feel confident I have the necessary skills to perform my current role	225	172	17	8	2
I have access to the training and mentoring I need	61	137	138	70	18
I am aware of suitable training opportunities to help me develop my career	48	129	112	108	27
I am able to balance my current workload with the demands of other areas of my life	59	166	80	84	35
My current employer supports my career development needs	100	135	133	37	19

Chart 14: Attitudes towards training and careers

³⁹ BFI, Skills Review 2022 (London: BFI, 2022) <<https://core-cms.bfi.org.uk/media/22344/download>> [accessed 1 August 2023]

⁴⁰ ScreenSkills, High-end Television in the UK: 2021/22 workforce research, (London: ScreenSkills, 2022) <<https://www.screenskills.com/media/5258/high-end-television-workforce-research-2021-22.pdf>> [accessed 1 August 2023]

⁴¹ Lindsey Bowes and others, Skills needs assessment for the creative and cultural sector (Leicester: Arts Council England, 2018) <<https://www.artscouncil.org.uk/sites/default/files/download-file/SkillsNeedsAssessment.pdf>> [accessed 1 August 2023]



Education

81% of those employed in the screen sector in Wales are educated to undergraduate degree level or equivalent (Level 6), significantly higher than the UK national average of 44%⁴² across all industries.

In addition, 21% of respondents are educated to post-graduate level (Levels 7 and 8).

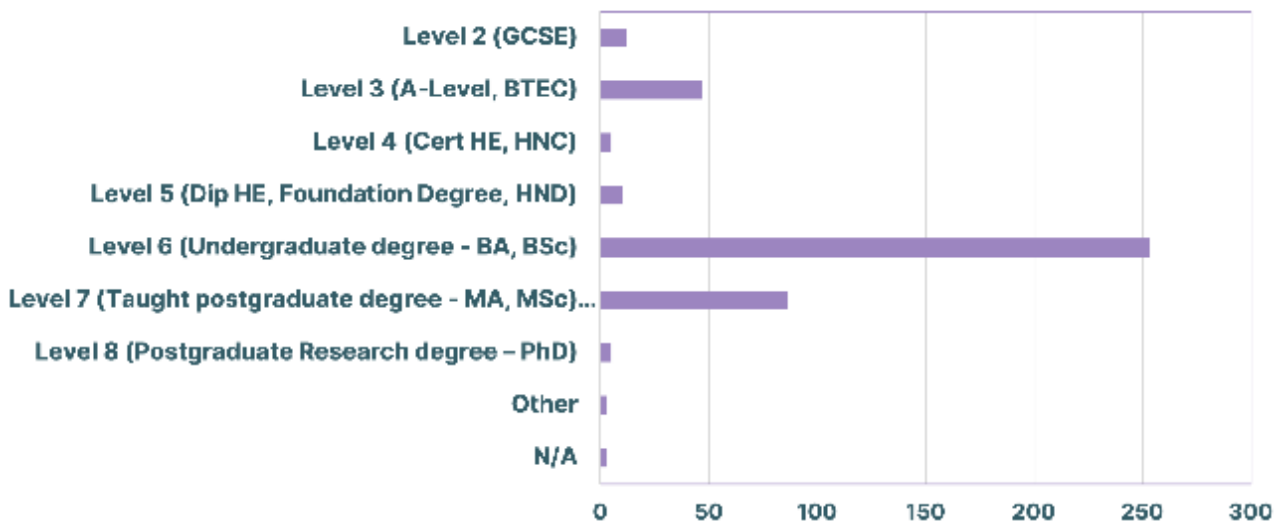


Chart 15: Level of highest educational achievement

⁴² Heather Carey, Lesley Giles and David O'Brien, p. 6.



Welsh language skills and training

Despite the positive statistics about Welsh language proficiency within the screen sector, it does pose challenges for some, and in these instances additional support is needed to nurture an encouraging and inclusive industry.

When asked what barriers respondents faced when entering or progressing in the screen sector in Wales – and it is important to note that this was an open question and not a multiple-choice question – 5% of non-Welsh speakers and 4% of new speakers (or learners) listed lack of Welsh language ability as a key barrier for entry or progression.

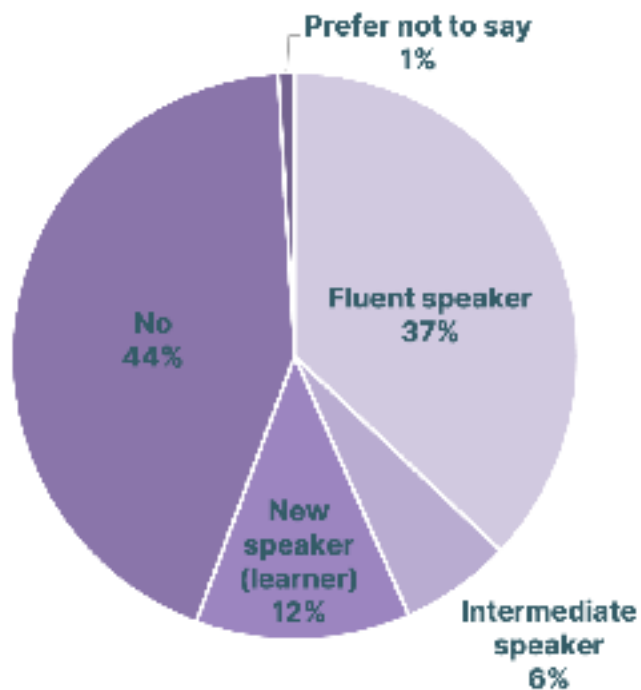


Chart 16: Welsh language ability

“Inability to speak Welsh is a barrier to working on Welsh language content.”

“The need for acceptance as a non-Welsh speaking person would be key to anyone trying to make headway and getting work in Wales. So, if you were to ask me what will give me a better chance of getting work in Wales, then my training would need to be to learn to speak Welsh.”

“I don’t often get Welsh language content because the assumption is I don’t speak Welsh or I don’t see myself as Welsh, which is not true.”

With the launch of a Memorandum of Understanding between S4C and the Welsh Government and S4C’s appointment of a Welsh language strategy Lead, monitoring the progress of Welsh-language initiatives will provide valuable insights for Media Cymru. From a skills and training perspective there is a need to explore the missed opportunities for on-the-job learning for those wanting to learn or improve their Welsh language skills.



Innovation

Research and Development (R&D), and Innovation for the screen sector in Wales is at the heart of the Media Cymru project. Respondents were asked to offer their perspectives on a series of statements with regards to innovation.

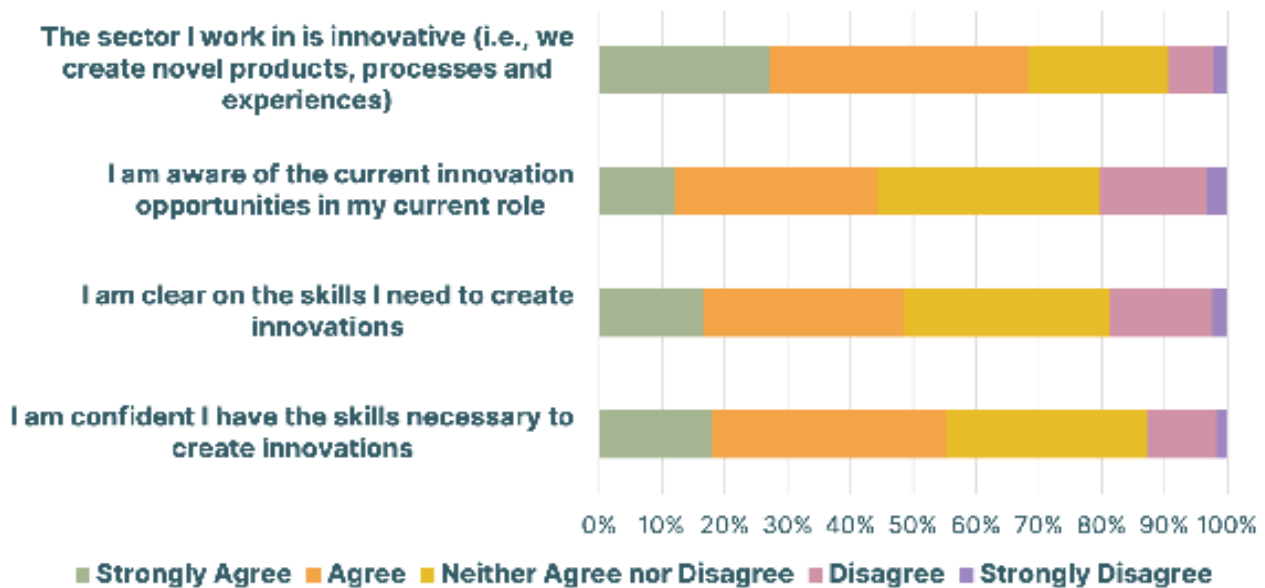


Chart 17: Attitudes towards innovation in the screen sector

The Welsh screen sector is considered by 68% of those who work within it to be an innovative sector, but there remains scope to improve both the awareness of opportunities relevant to innovation within the sector, and the process of equipping individuals with the skills to become innovative themselves. 49% agreed or strongly agreed they were clear on the skills needed to create innovations, with 55% feeling confident that they possessed those skills.

Results also show a lingering lack of clarity and ambivalence to the concept of innovation, however, with a significant proportion of respondents neither agreeing nor disagreeing with the statements. This suggests a continued need to increase awareness around innovation and innovative practice across the screen sector in Wales, providing training and opportunities for individuals to work on projects that relate directly to innovation and R&D.



Future Skills

As part of our work on skills and training, it was particularly important to understand the workforce's perspectives on future skills needs. Respondents were asked to identify what skills they would view as key to their development over the next two years.

This was an open question, through coding eleven categories were created to reflect the range of responses.

Role-Specific Training, based on current job role	124
General Business Acumen (Growth, Distribution, Grant applications, Fund-ing)	74
Training related to software and new technologies (e.g., Unreal Engine, Editing, AI, Virtual production etc)	62
Training in People Management and Leadership	52
No training / Unsure	52
General Industry Experience	30
Work-Based Culture Training (Mental Health, Well-being, EDI, Sustaina-bility)	28
Soft skills (Networking, Inter-personal, communication, presenting skills)	26
Hard skills, not directly related to a specific role (Data protection, Health and Safety, First Aid training, Driving lessons etc)	20
Stepping Up to more Senior Roles	16
Online Communication skills utilising social media	9

Table 4: Skills needs

Role-specific training was listed as the largest area where training was needed for career progression, followed by business acumen. In terms of variance of training needs, the most significant difference was based on gender and linked to training in Communication, Health and Safety/First Aid, and Work-Based Culture Training. Communication training was exclusively listed by male respondents and First-Aid training by female respondents. Women were three times more likely to list the need for Work-Based Culture Training than men.

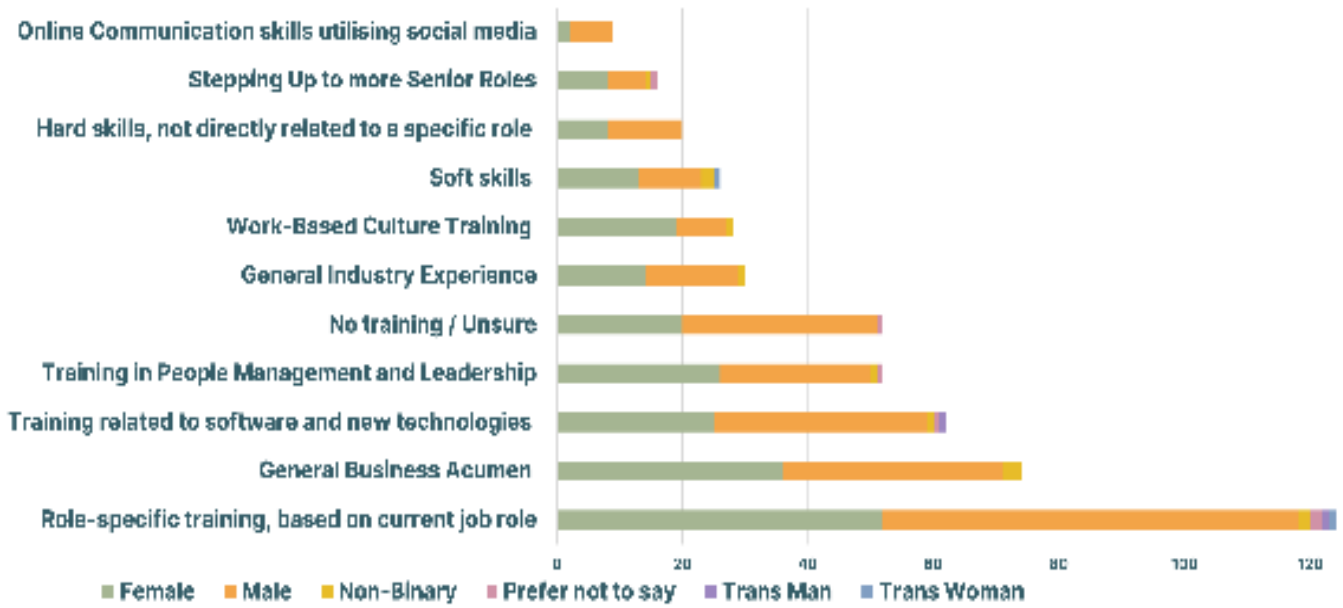


Chart 18: Attitudes towards innovation in the screen sector

Culture Change .





Diversity in Senior Roles

There is a notable imbalance when it comes to gender, ethnicity, long-term health conditions or disability and career progression in the screen sector. 51% of men surveyed held senior roles compared with 37% of women. 4.5% of respondents who listed having long-term health condition or disabled and only 3% of respondents came from the Global Majority held senior roles.

Additionally, there is the impact of intersectionality – the notion that two or more aspects of someone’s identity or circumstances interplay to make it harder for them to progress in their role – which is also prevalent. With only two (0.5%) of our respondents who were female and from Global Majority groups (in senior roles), we can see that the combination of gender and ethnicity Impact career progression.

In order to drive change and create a more inclusive screen sector, we need to see more diversity in senior roles. Such diversity is contingent on two main factors. Firstly, more transparent, egalitarian and structured career pathways to allow a wider range of the representative workforce the ability to ascend to those more senior positions organically. Secondly, a greater sensitivity and understanding of the reasons for attrition rates within the screen sector in Wales is needed.

In the context of a general lack of diversity within the sector, as well as the specific lack of representation highlighted here, is an attitude among respondents that the current working environment is inclusive and supports diversity. That this attitudinal response seems to contradict the figures of representation may speak to the wider literature on factors that reinforce inequality in creative industries^{43,44}, but regardless requires further investigation.

My current working environment is inclusive and supports diversity

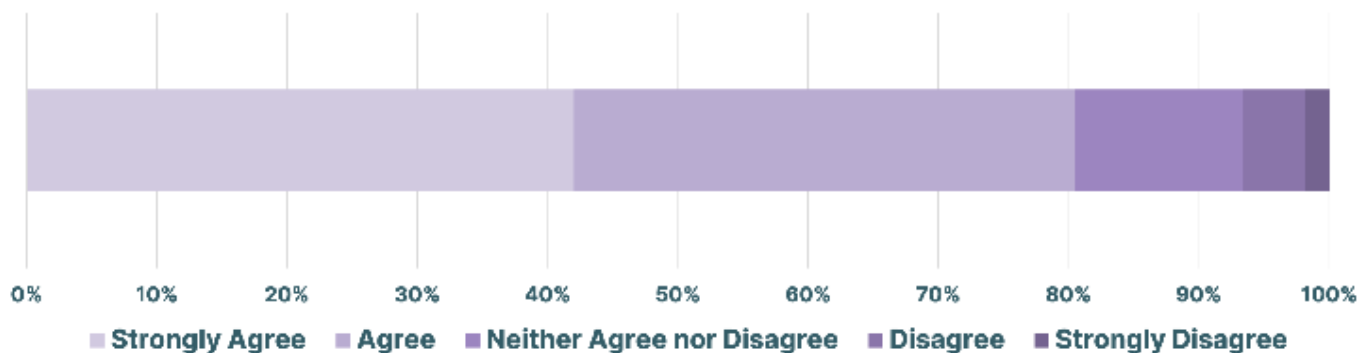


Chart 19: Attitudes towards support in the working environment



Joining and progression

Respondents were asked to identify the major barriers they had encountered in either entering the screen sector in Wales or progressing within it. 42% of respondents felt they had not encountered any barriers. Of those who had faced barriers, the biggest barrier was the difficulty in identifying and finding out about opportunities for progression. This is followed by respondents citing various forms of discrimination, in the form of sexism, racism and ageism, that had, they felt, prevented them from progressing.

⁴³ Mark Taylor and Dave O'Brien, 'Culture is a Meritocracy: Why Creative Workers' Attitudes May Reinforce Social Inequality', *British Sociological Association*, 22.4 (2017), pp. 27-47 <<https://doi.org/10.1177/1360780417726732>>

⁴⁴ Rosalind Gill, 'Unspeakable Inequalities: Post Feminism, Entrepreneurial Subjectivity, and the Repudiation of Sexism among Cultural Workers' *Social Politics: International Studies in Gender, State & Society*, 21.4 (2014), pp. 509-528 <<https://doi.org/10.1093/sp/jxu016>>

Knowledge about progression opportunities	118
Discrimination (Sexism, Racism, Ageism etc.)	51
Geographic factors	45
Finding and accessing entry-level positions	34
Financial (Pay/Funding)	30

Table 5: Top five barriers to joining and progressing in the screen sector



Retention and attribution

The data points to a variety of issues that interact with retention and attrition rates in the Welsh screen sector. 52% of respondents admitted they had considered leaving the screen sector at some point. Broken down by gender, 58% of female respondents had considered leaving, 47% of male respondents and 71% of non-binary respondents.

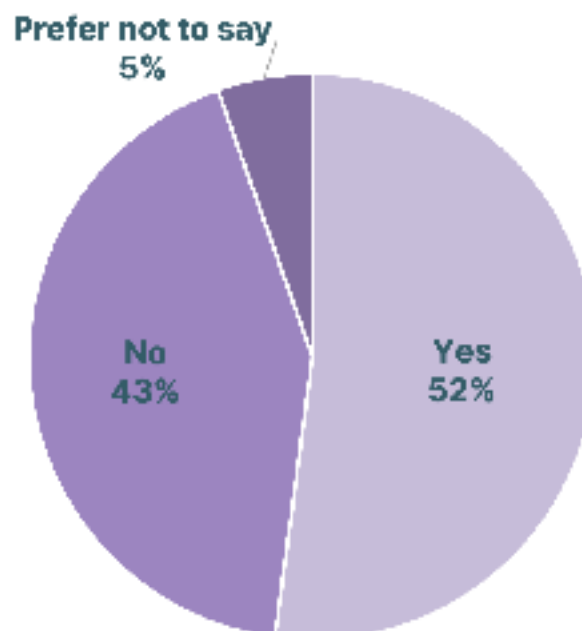


Chart 20: Respondents that have considered leaving the screen industry

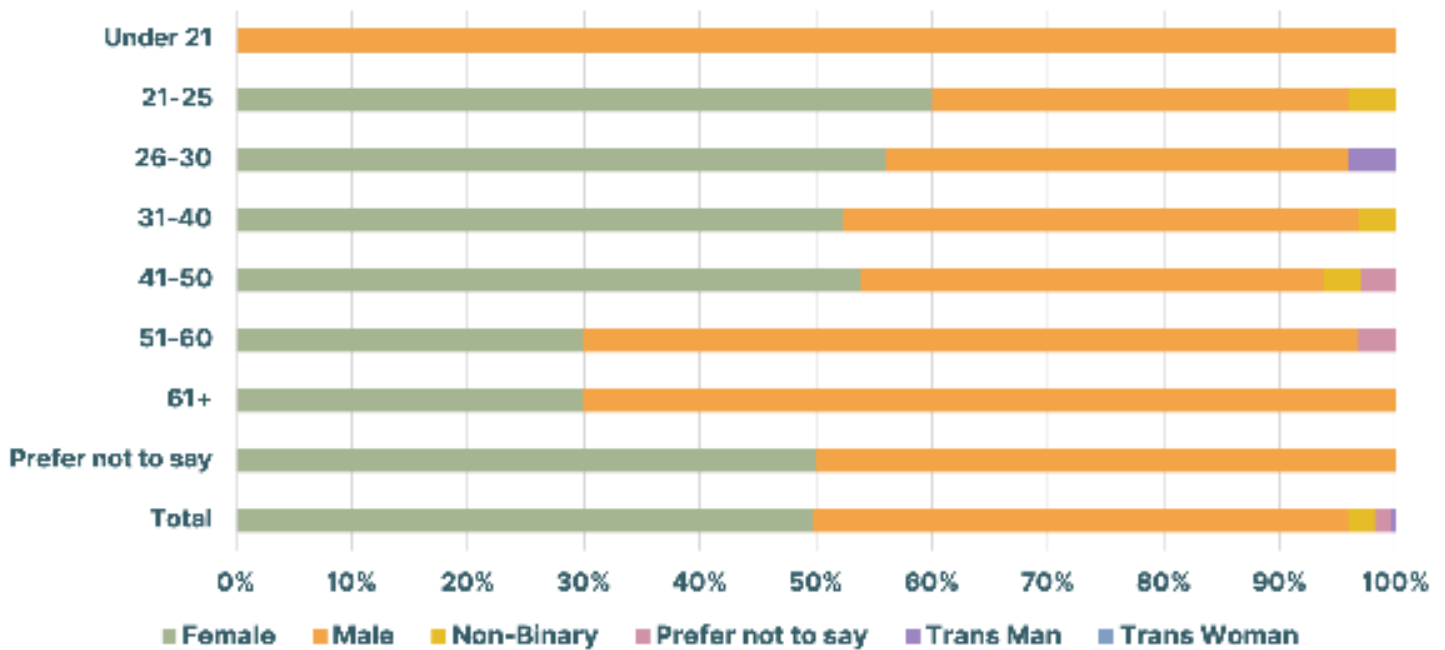


Chart 21: Gender and age breakdown for those that have considered leaving the screen sector

The highest percentage of women considering leaving peaks amongst those aged between 31-50. 70% of women aged 31-40, and 67% of those aged 41-50 had considering leaving the screen sector. These figures are significantly higher than amongst men in the same age categories, with 43% of men aged 31-40 and 51% of men aged 41-50 considering leaving the sector.

The second marked difference between male and female respondents can be seen in the 51-60 age bracket where we see for the first time the percentage of men considering leaving overtaking that of women. 59% of male respondents in this age category had considered leaving, compared with 43% of women.

Due to the small number of non-binary responses, and no non-binary respondents aged over 51, we are limited in what conclusions can be drawn from our findings, but our results show that the highest age category for those non-binary respondents considering leaving the screen sector was seen in the 31-50 category, and the lowest in the 21-30 category.

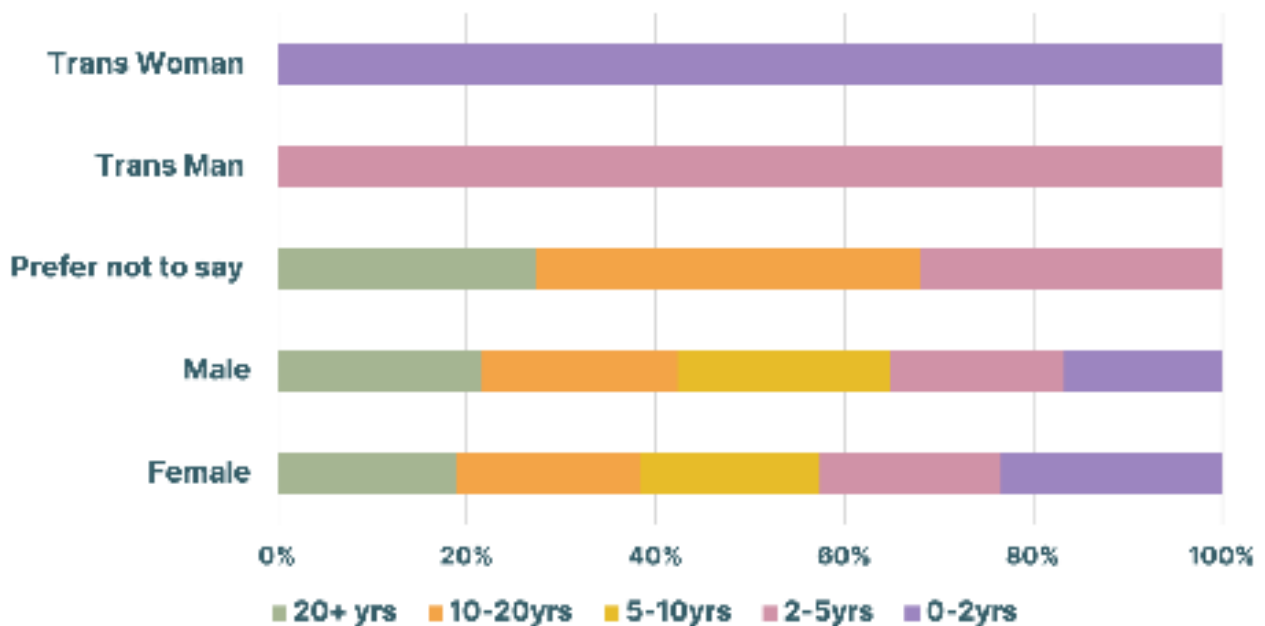


Chart 22: Gender and time spent in industry breakdown for those that have considered leaving the sector

More women than men have entered the Welsh screen sector within the last two years, but there are significant differences in retention rates between men and women, based on the length of time spent in industry. Between 5-10 years, the number of men overtake women, and that trend continues beyond 10 and 20 years in industry. These figures relate to not only more historic inequalities, but also a gendered split between when people start considering leaving.

Respondents were also asked to identify the main reasons they had for considering leaving the screen sector. Results below illustrate an overall concern with stress, poor mental health, long hours and fears over job security. The Film and TV Charity's 2022 Looking Glass⁴⁵ report also noted that 60% of people working in the TV and film industry in the UK had considered leaving the industry due to mental health concerns.

⁴⁵ Film and TV Charity, Looking Glass 2022: Mental Health in the Film and TV Industry (London: Film and TV Charity, 2022) <https://25788730.fs1.hubspotusercontent-eu1.net/hubfs/25788730/Looking%20Glass%2022_FINAL.pdf> [Accessed 1 August 2023]

In terms of gender differences, there is a marked variance between male and female respondents. Whereas both men and women cite stress and poor mental health as a major reason to consider leaving, women are equally concerned by long hours and maintaining a healthy work/life balance, whereas the most common concerns among males are job insecurity and financial concerns. Women were twice as likely than men to list toxic workplace cultures, including harassment, bullying and discrimination as a reason for considering leaving.

The BFI Skills Review⁴⁶, emphasised workforce retention as key in supporting the existing workforce through a time of unprecedented demand, as well as making production workplaces and culture an attractive and supportive environment to be in. The Welsh screen sector has a collective responsibility for tackling the work-based cultures that are leading to declining retention rates.

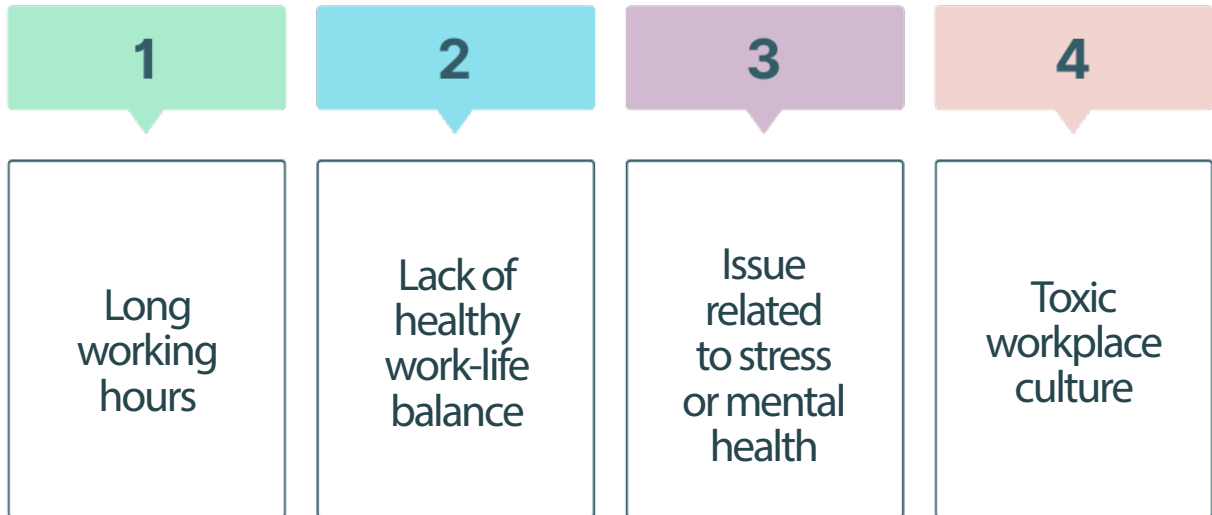
Issue related to stress or mental health	54
Long working hours	50
Short-term and longer-term job insecurity	50
A lack of a healthy work-life balance	48
Toxic workplace culture (inc. discrimination and bullying)	43
Challenging financial reasons (inc. low pay & working for free)	40
Concerns about wider industry direction/trends	29
Lack of career progression	28
Issues related to caring responsibilities	23
Difficulties associated with transport and travel	10
Feeling a lack of creative fulfilment	8
Physical health reasons	7

Table 6: Reasons to consider leaving the screen sector

⁴⁶ BFI p. 21.



Top reasons for leaving for female respondents



Top reasons for leaving for male respondents



The responses above highlight a range of issues currently facing the screen sector workforce, but it is important to emphasise the passion and positivity that emerged through responses to this survey. When participants were asked why they chose to stay, there were a great number of positive responses, primarily because they love their work and that there have been positive changes in workplace culture and working conditions. The pandemic demonstrated that change was possible and highlighted the possibilities for alternative working practices. While this research shows that much is still needed to improve the working culture within the sector, the impact of implementing change is a positive one, and should not be overlooked.

Being passionate about my job	77
Working conditions/working culture changed and improved	60
Competitive rates of pay	34
A perception of being unable to do anything else	33
The opportunity to be creative	20
Working with more supportive and friendly people	20
Skillsets are specialised and non-transferable	20
Haven't yet decided to stay	13
A sense of being good at my job	5

Table 7: Reasons given as to why respondents chose to stay in the screen sector

“The positives outweighed the negatives. Leaving the media would feel like stepping back into the boredom of normal work”

“I do very much enjoy my job and working with the many people who make film crews a wonderful team, it’s a minority that ruin it for me, not the majority.”

“I love what I do, I love the sector, and I believe I can make a difference through my work”

“I want to give graduates and young professionals the leg up they need to succeed where many already struggle.”

Participants were also asked to show their responses to a series of questions around attitudes to mental and physical health in relation to their jobs, as well as confidence in processes within the workplace to raise concerns about inappropriate behaviour and processes around supporting well-being.

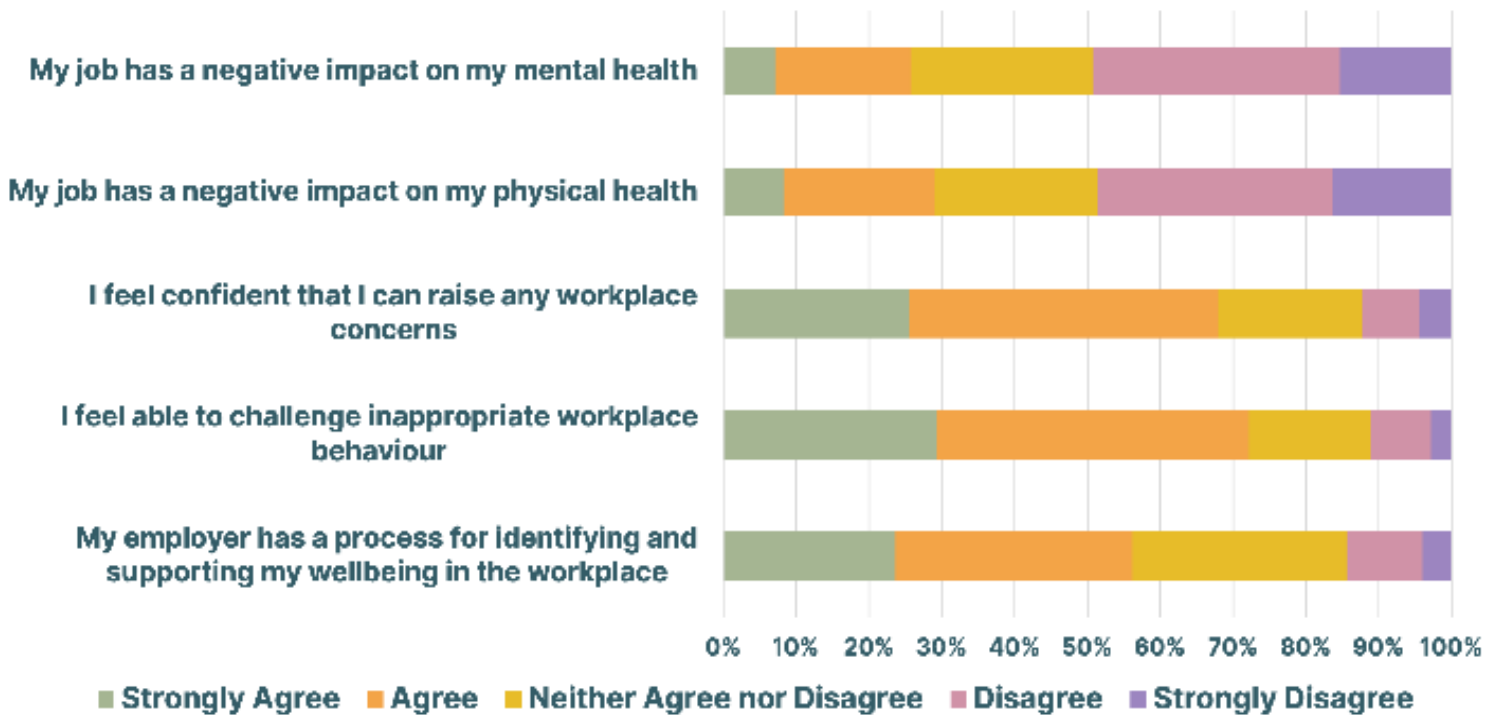


Chart 23: Attitudes towards wellbeing in the workplace

Overall, 26% of respondents agreed or strongly agreed their job was having a negative impact on either their mental or physical health. These figures differ slightly with the results reported by the Film and TV Charity in the 2022 Looking Glass Report⁴⁷, where 24% listed poor mental health and 40% listed fair mental health. Though not a direct comparison, our responses reinforce the fact that a sizeable proportion of screen sector workforce harbours these concerns. A broadly positive response to the questions around challenging workplace behaviour and concerns suggests that foundational steps are being made in the right direction, but it should be reiterated that efforts should continue to eradicate inappropriate behaviour and toxic working environments.

⁴⁷ Film and TV Charity, p. 28.



Caring responsibilities

Our results reveal a considerable difference between men and women in terms of the priorities that impact their reasons for remaining in the sector. Specifically, female respondents placed a much greater importance on a healthy work/life balance. A key factor in this is caring responsibilities. Respondents were asked about their caring responsibilities, either as a parent, carer or both. The impact of caring responsibilities on career progression and representation is significant.

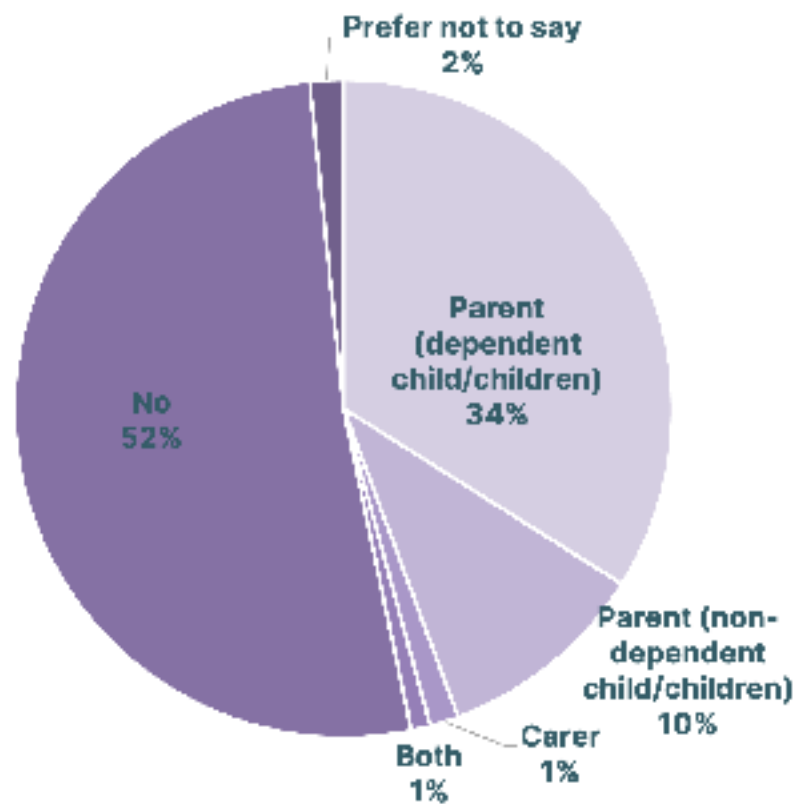


Chart 24: Parental or caring responsibilities

80% of women with caring responsibilities were aged between 26-50. Of those, 70% had considered leaving the screen sector, in comparison to 61% of men. Following the Covid pandemic, The University of Nottingham published its Locked Down and Locked Out⁴⁸ report, arguing that “retaining mothers in TV is not a priority for the industry. It does not feature on diversity agendas and the exodus of women over 35 is not talked about as something that there is any urgency to address.”

⁴⁸Natalie Wreyford, Helen Kennedy, Jack Newsinger and Rowan Aust, Locked Down and Locked Out (Nottingham: Institute for Screen Industries Research, 2021) <<https://www.nottingham.ac.uk/research/groups/isir/documents/locked-down-locked-up-full-report-august-2021.pdf>> [accessed 1 August 2023]



Mobility and travel

The screen sector in Wales is a highly mobile workforce and one that relies heavily on individual transportation. Respondents were asked to note the locations they lived and worked in, in the past 18 months. The locations were based on counties within Wales, and if they lived or worked outside of Wales (but in the UK) or overseas.

Cardiff is the county that most respondents lived in. 80% of respondents lived in the Cardiff Capital Region⁴⁹ (CCR). 22 respondents lived in other parts of the UK and five lived overseas.

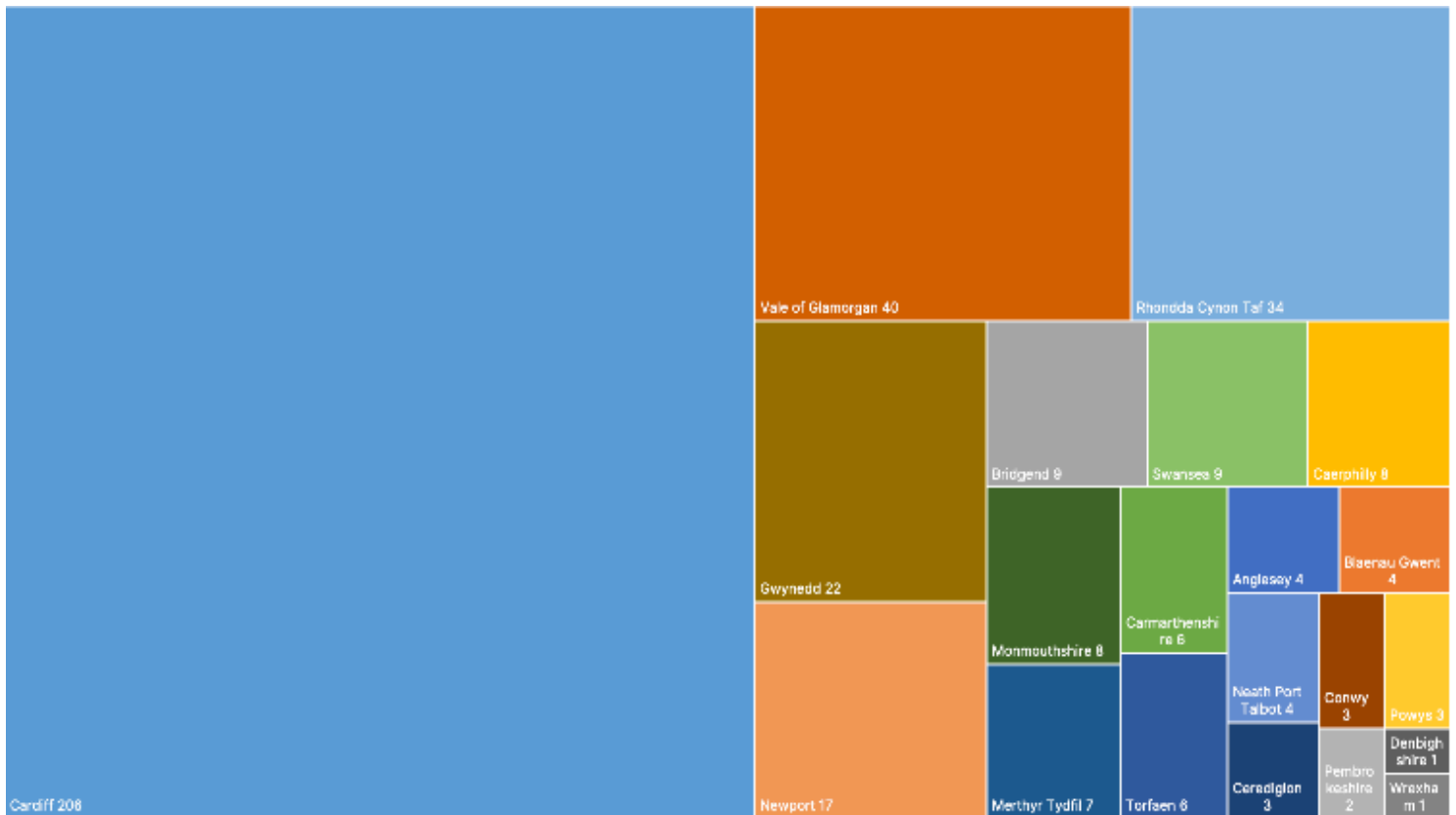


Chart 25: Number of respondents living in each county

⁴⁹The Cardiff Capital Region (CCR) embraces the 10 local authority areas covering south east Wales - Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen, and Vale of Glamorgan.

Cardiff was the location most noted for work with 334 of those surveyed having worked in the city over the past 18 months. Second to Cardiff was outside Wales with 134. 43 respondents had listed working overseas which equates to 10% of those surveyed.



Chart 26: Number of respondents working in each county

60% of respondents had worked in more than one location (county) in the previous 18 months. The highest figures for multiple locations for work were recorded in Scripted TV, Unscripted TV and Commercial Content. A disproportionately small amount of the workforce is doing a large proportion of the travelling, with 11% working in more than ten locations within an 18 month period up to the end of 2022. The highest reported number of locations worked in by a single respondent was 26.



Transport Barriers

The largest group of respondents worked in Scripted Film and TV, closely followed by Unscripted, with a significant proportion working in both. This is followed by Post-production, Commercial content, Animation, Games and VFX. 58% of respondents worked in a single sub-sector, indicating a significant number of respondents work in multiple sub-sectors.

Distance to working locations in Wales	32
The inability to drive	30
The cost of individual transport and fuel	24
Lack of public transport infrastructure	18
Childcare constraints to travel	16

Table 8: Top five travel barriers



The following quotes from respondents give more insight into the travel barriers being experienced.

“Many shooting locations require cars or own transport, which I do not have.”

Distance to working locations in Wales

“Travel prevents fulfilling parental roles and does not allow for a healthy home / life balance. Also, the costs can be prohibitively expensive.”

Childcare constraints to travel

“Before being able to drive was extremely difficult, current fuel costs dictate where/ what kind of work is undertaken.”

The cost of individual transport and fuel

“I can't drive, public transport in Wales is not good enough and lots of jobs in the sector specify that you must hold a driver's license.”

The inability to drive

Significant investment is needed in public transport and improving a sustainable infrastructure in Wales to support economic growth in the screen sector. The lack of Electric Vehicles (EV) charging ports in rural areas in Wales was also listed. With EVs offering a viable solution for some production teams in tackling their carbon footprint, Wales' green infrastructure must be a priority for safeguarding this growing economy.



Travel and Sustainability

The data here characterises a workforce that is highly mobile, individualised, and dependent on personal transportation to survive and thrive. Public transport infrastructure is insufficient to meet the needs of the Welsh screen sector currently, and those unable to drive find it presents a substantial barrier to their career progression. Such issues inevitably impact issues around environmental sustainability. Such high levels of mobility demonstrate the reliance on transportation and fuel consumption. BAFTA albert's Carbon Calculator data puts the average hour of TV in 2021 as contributing 5.7t CO₂e per hour, a 30% increase from 2020, with travel remaining the largest part of a production's footprint⁵⁰.

BAFTA albert's Annual Review⁵¹ highlights the centrality of transport to issues of combatting carbon footprints and achieving net zero targets, 'travel remains the biggest part of a production's carbon footprint, regardless of genre'. In 2022, BAFTA albert and the BFI announced that Wales had been selected to put environmental sustainability recommendations for screen production into action in the Screen New Deal: Transformation Plan⁵². Consequently, Wales is well-placed to spearhead efforts to forge a screen sector that is sustainable, inclusive and responsible for safeguarding the future of Wales.

⁵⁰ albert, Carbon Calculator and Production Certification, (London: BAFTA, [n.d.]) <<https://wearealbert.org/carbon-calculator-and-production-certification/>> [Accessed 1 August 2023]

⁵¹ albert, Annual review 2021, (London: BFTA, 2021) <https://wearealbert.org/wp-content/uploads/2023/01/albert-AR-2021_Finalv2.pdf> [accessed 1 August 2023]

⁵² BFI, Wales to develop a 'Screen New Deal' production sustainability plan, (London: BFI, 2022) <<https://www.bfi.org.uk/news/wales-develop-screen-new-deal-production-sustainability-plan>> [accessed 1 August 2023]

Conclusion



Conclusion ■

This inaugural Screen Workforce Survey for Wales has been designed to provide an up to date, as well as ongoing picture, of the workforce across the various sub-sectors of the screen sector (Film and TV, Games, Animation, Post-production etc) across Wales. While most of the activity remains in the Cardiff Capital Region, what emerges is a highly mobile workforce, based in and working all over Wales, but also accustomed to working across the UK as well.

Our findings have been grouped into three pre-eminent themes; Workforce demographics, The challenges for skills and training and a need for a wider cultural change in the way work is conducted in the screen sector. It is therefore appropriate to conclude with some commentary on each of these overarching themes in turn.



Workforce Demographics

Advances are being made. Overall numbers of women and men are levelling out and that is to be applauded, without losing sight of the continued lack of representation of women in senior roles. A lack of adequate childcare provision and acknowledgement of the needs of those with caring responsibilities is closely linked to this. The Welsh language is well-represented in the sector, and with it not only an opportunity to promote and support the future of the language, but an increased opportunity for Welsh-language content to reach a global audience.

With regards to ethnic diversity, while statistics track largely with the wider Welsh population, the amount of screen sector activity that takes place in and around the CCR region points to a marked disparity in demographic representation at a regional level. The global majority remains under-represented in the screen sector, both behind and in front of the camera, and though things are slowly moving in the right direction, these findings should serve as renewed motivation to continue to change. The same is true of those with long-term health conditions and disabilities, these groups remain under-represented in screen and more needs to be done to ensure opportunities are available to those with differential needs.

More generally, there is a real need to start considering attrition and retention rates, as well as frameworks for continued professional development, to account for the increased numbers of those leaving from more senior roles, and over the age of 50.



Skills and Training

There are a wide variety of skills and training initiatives in Wales, particularly in and around the CCR region, but uptake of that training provision is far below what it should be. This problem is even more pronounced among freelancers, but all workers have found both making the time to undertake training, as well as knowing what opportunities are out there, considerable barriers to progression.

A lack of knowledge in the context of such a variety of training initiatives raises questions about the communication and collaboration between industry and training providers, and a low training uptake suggests a lack of confidence in the quality of the training on offer.

Attitudes toward innovation suggest a workforce that is responsive to new technology and ideas, but a level of ambivalence in responses indicates more can be done to prepare and educate the workforce about the nature of screen sector innovation, and equipping individuals with both the skills and the knowledge of opportunities.

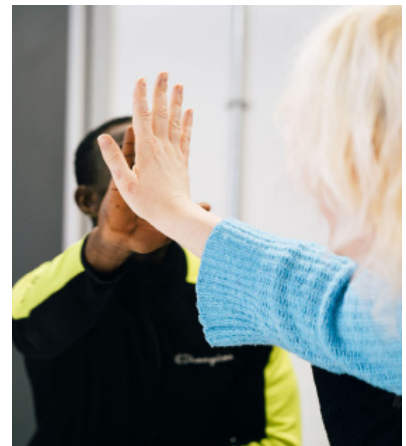
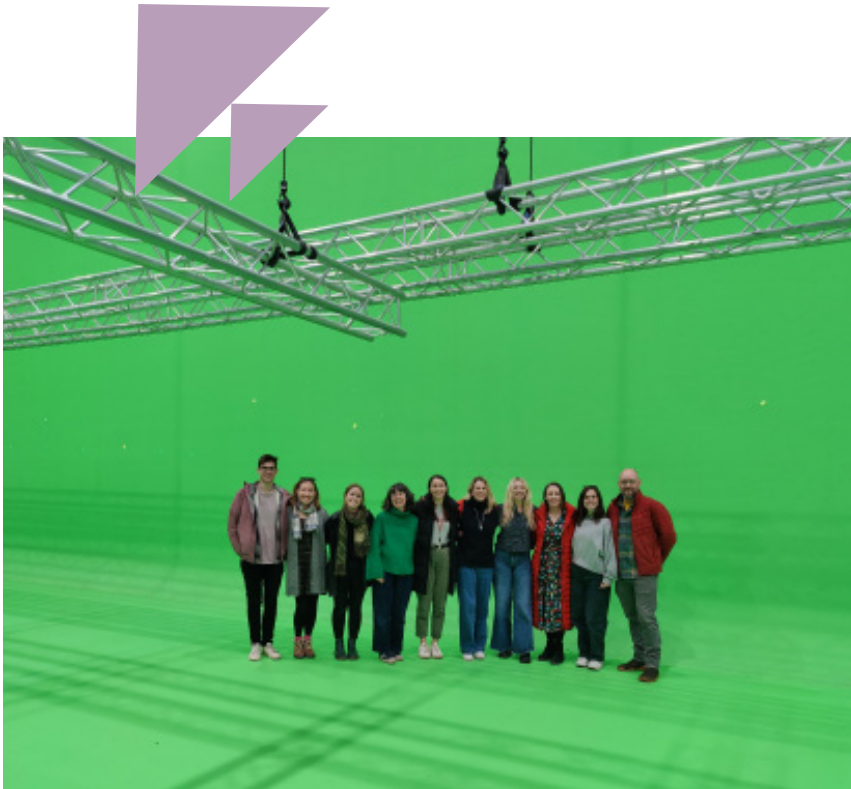


Culture Change

A foundational theme from this research was that of a need for change. That change may be required in the shift of working patterns away from long hours, tight deadlines and workloads that are the source of poor mental health and stress. A better understanding around management, leadership, and HR responsibilities is needed, to limit exposure to toxic workplace environments, as well as an ongoing effort to ensure the Welsh screen sector is as inclusive, sustainable and enjoyable as it can be, for everyone.

The overwhelming sentiment expressed by respondents when asked why they stay in the screen sector was that of passion. Passion for their work, co-workers, and their ability to work creatively. Wales is currently poised to capitalise on a huge number of opportunities, and we need to ensure our workforce is properly catered for, supported and valued.

The screen sector in Wales is incredibly important, both economically and culturally. The aim of this report is to highlight the growing need to drive change in order to sustain this thriving industry. Sometimes striking the balance between what is acceptable, realistic, sustainable, and fair becomes blurred, but as an industry there is a need to address the collective responsibility to initiate change. Our research has highlighted “love and passion for working in the screen sector” as the main reason for not leaving, but passion alone cannot sustain this sector. We must also strive to improve our industry so that people’s love for the work they do is not exploited.



Thank you

