Media Cymru Interim Progress Report

MILLER
Research Evaluation Consulting

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Executive Summary

Background to the Report

Media Cymru is a five-year (2022-27) >£50 million programme aimed at fostering growth and innovation within the media sector in the Cardiff Capital Region (CCR). This report presents the first baseline and early interim progress evaluation prepared by Miller Research with data up to October 2024 based on interviews with key stakeholders, analysis of the programme, internal data as well as desk research and support by the Media Cymru team.

Key highlights

Our analysis shows that Media Cymru has demonstrated significant progress since its launch in 2022 up to October 2024. The main conclusions from the first interim evaluation can be summarised as follows:

Pillar	Progress
Growth	Economic growth in the media sector is showing progress against key growth sector-wide KPIs, with employment, productivity and GVA growing strongly. Businesses have reported a turnover growth of £214,000 and 861 new full-time roles in the CCR AV sector.
Green	Work is ongoing to reduce sector GHG emissions through specific projects and funding streams such as the Climate Stories Fund and the BBC Content Innovation Fund. To date, more than £600,000 has been invested into 19 Green innovation projects and environmental initiatives such as 'Greenlancer' and Sustainability Coordinator training have been put in place.
Fair	Data shows that representation of those from minority communities working in the local media sector in the CCR has increased. To date, £460,000 has been invested in 23 Fair-related projects addressing structural inequalities in the sector and 390 people have participated in equality, diversity and inclusion events and training.
Global	Export targets have been exceeded by 70%, and the programme has formed a range of strategic relationships across Europe, North America and Japan. Sector delegates have attended 19 international events and Media Cymru has received 20 citations in international press.

| Lever	Progress
Innovation Funding	79 innovation projects have been supported, including funding through the Innovation Pipeline and funded projects to address critical barriers such as limited resources and high risks associated with innovation.
Community Strengthening	Media Cymru strengthens community and fosters collaboration by facilitating events and conferences with 1700 attendees to date. The programme is also raising the profile of the CCR media community through press coverage and communications channels.
Skills Development	Exceeded training participation KPI by 70% with partnerships offering low-cost or free events and industry-expert sessions, attracting 460 participants.
Knowledge Creation	The academic publication target has been doubled, publishing 10 academic journal articles. A University of South Wales Screen Industries Workforce Survey highlighted the main challenges and opportunities for training in the sector to inform future activity.
Policy Engagement	Two policy briefs have been published to impact policymaking based on evidence from the Media Cymru programme and the team has participated in seven consultations and expert advisory sessions with policymakers.

Introduction

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1.1 Background to Media Cymru

Media Cymru, led by Cardiff University, was launched in 2022 and aims to turn the Cardiff Capital Region (CCR) into a global hub for media innovation, with a focus on green and fair economic growth.[1] Media Cymru has secured funding from various sources, including an investment of more than £22 million from UK Research and Innovation (UKRI) through the Strength in Places Fund (SIPF), £3 million from the Cardiff Capital Region, £500,000 from the Welsh Government through Creative Wales, and more than £25 million match funding from industry and university partners. Media Cymru is one of two projects funded by SIPF which is aimed at the creative and cultural industries, and the only one led outside science, technology, engineering, and mathematics (STEM). Launched in 2017, SIPF is a competitive funding scheme that takes a 'place-based' approach to research, development and innovation (RD&I) funding, aiming to address regional disparities in productivity and economic growth across the UK. Media Cymru builds on the legacy of Clwstwr, a five-year programme led by Cardiff University aimed at supporting greater innovation in the creative and cultural industries with a focus on the media sector in South Wales, through funding RD&I projects, networking, events and knowledge sharing.[2]

Media Cymru operates as a Consortium of 22 partner organisations, representing a diverse range of stakeholders within the media sector. These partners include national broadcasters, regional media SMEs, and strategic stakeholders including the CCR and the Welsh Government (see Figure 1.1).

Figure 1.1 – Projects and Consortium Members by Location


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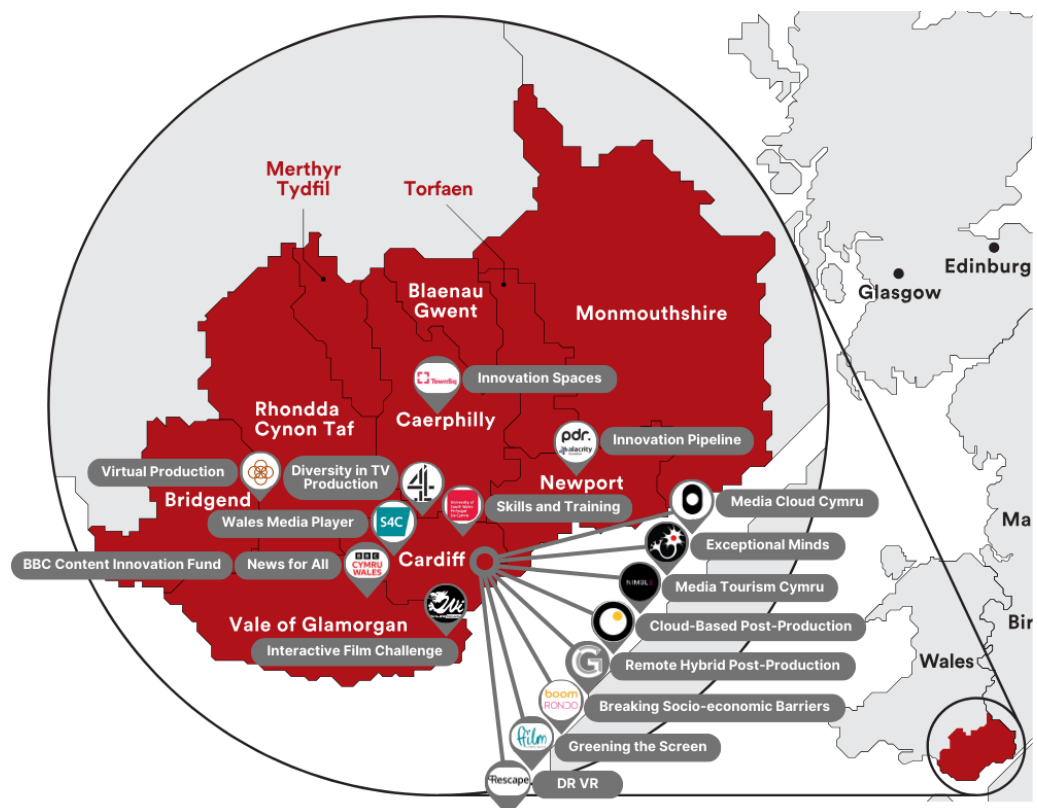
[1] Media Cymru. (n.d.). *Leading media innovation in Wales.* Retrieved November 9, 2024, from https://media.cymru/
[2] Clwstwr. (n.d.). *Clwstwr: Where Ideas Thrive.* Retrieved January 9, 2025, from https://clwstwr.org.uk/

Media Cymru is organised into four work packages (WPs). Each work package has several projects that contribute to the goals of the programme (see Figure 1.2). Activities are delivered by the allocated project leads and relevant partners and are intended to be completed within a specified timeline. Cardiff University is leading the management of the programme (WP4). Collectively, the Consortium aims to:

- Create a future-focused production infrastructure (WP1)

- Upskill the media cluster workforce and operate an RD&I ecosystem to embed innovation in the region's media cluster (WP2)

- Address a series of key challenges facing the global media sector (WP3).

Figure 1.2 – List of Work Packages
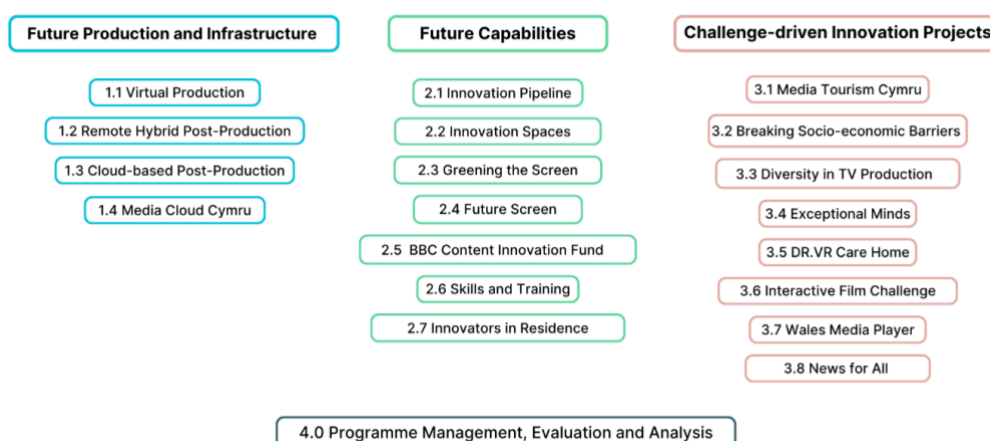
1.2 Media Cymru Strategic Pillars and Levers

The CCR has a unique set of needs, challenges and opportunities. Media Cymru seeks to ensure that funded project activity makes a positive contribution to the region and the media cluster. This means delivering projects with social and environmental sustainability in mind, alongside commercial and globally recognised success. As a result, four strategic pillars and five programme levers were developed and integrate into the programme as illustrated by Figure 1.3 below.

Figure 1.3 – Media Cymru Strategic Pillars and Levers
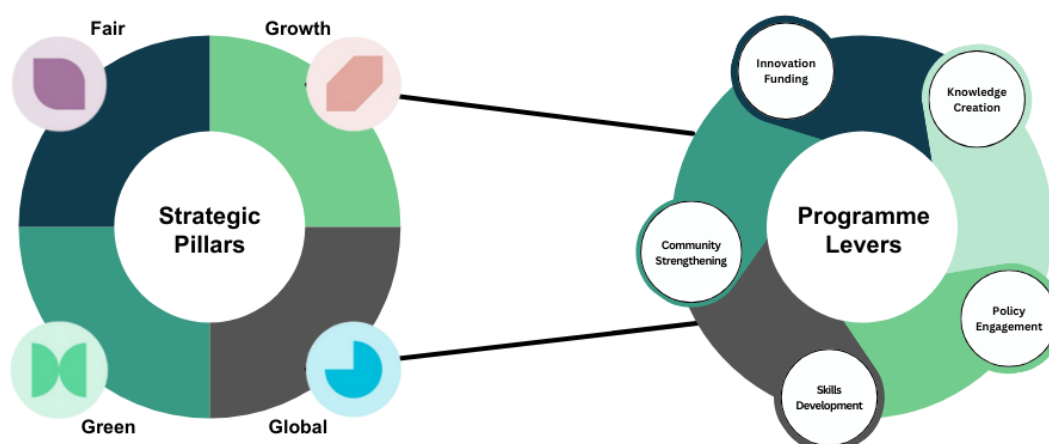
The strategic pillars support Media Cymru to clearly define outcomes (see Figure 1.4). These sit alongside the programme levers – the necessary actions that need to be taken under each pillar to achieve change and realise the ambitions of the region (see Figure 1.5).

Figure 1.4 – Media Cymru Strategic Pillars

Pillar	Description	Example
Growth	To support the media sector to help address the economic needs and challenges of the Cardiff Capital Region	Through growth in FTE jobs and increase in RD&I in the sector, and growth in productivity of freelancers
Green	To support the sector in delivering economic growth which is more environmentally sustainable	Through reducing GHG emissions in the sector, increasing awareness of sustainable practices and engaging staff in carbon literacy training
Fair	To create a fair, more equal and diverse sector	Through supporting opportunities for individuals from minority backgrounds to work in the local media sector of the CCR
Global	To establish the Cardiff Capital Region as a global hub for media production	Through investment in RD&I capabilities and building strategic long-term relationships with key international partners

Figure 1.5 – Media Cymru Levers

Lever	Description	Example
Innovation Funding	To drive R&I across the media sector and secure a greater amount of and investment of funding in innovation	Through providing targeted financial support to freelancers, SMEs and larger consortium projects
Community Strengthening	To strengthen the media community in the CCR and in turn in Wales	Through engagement opportunities, network development and building attractive opportunities in the sector
Skills Development	To improve the level and diversity of skills in the sector and close the skills gap	Through leveraging university resources to develop training and education opportunities
Knowledge Creation	To share knowledge gained through Media Cymru with the industry and academia	Through publishing academic articles, reports and presenting at conferences
Policy Engagement	To engage with policymakers on a local, regional and national level to support the sustainable growth of the media sector	Through drafting policy briefs and taking part in policy engagement activities

1.3 Background to this Evaluation

Cardiff University commissioned Miller Research to conduct a comprehensive programme evaluation of Media Cymru, spanning a four-year period from 2022-26. This evaluation is being carried out in parallel with the SIPF fund evaluation and other SIPF project evaluations. It comprises key stages including a baseline and early interim progress evaluation (2024-25), and a final evaluation (2026).

Two years on from Media Cymru's inception, this report establishes the context and baseline for the programme, alongside reporting on programme progress to date, observed through the early interim phase of delivery. The methodology for this stage of the evaluation is supported by prior activity undertaken during the inception phase of Media Cymru and will go on to inform the final evaluations. The fieldwork and research activities carried out during this phase of the evaluation comprised:

- Understanding the policy context

- Building and testing the baseline

- Presenting the current context and state of the CCR and beyond

- Reviewing and developing KPIs in collaboration with Consortium partners

- Monitoring project progress

- Primary research exercises - gathering feedback and insights on Media Cymru from producers, delivery team and Consortium partners

1.4 Structure of this Report

- **Introduction:** comprising background to the programme, introduction to the programme's strategic pillars and levers and the approach to the evaluation

- **Media Cymru's strategic alignment:** comprising an overview of alignment with the media sector, policy alignment and assessment of the 'needs' and requirements of the sector

- **Evaluation of strategic pillars to date:** an assessment of the four strategic pillars of Growth, Fair, Green and Global, including a presentation of the baseline data, key sector and programme KPIs and review of related projects

- **Evaluation of lever activities to date:** an assessment of the five levers of innovation support, skills development, knowledge creation / strengthening, community strengthening and policy engagement

- **Conclusion:** an overall summary of the progress and achievements of Media Cymru at the interim stage

Assessing Media Cymru's strategic alignment

2

2.1 Cardiff Capital Region Media Sector Alignment

Figure 2.1 – Media Cymru CCR Media Sector Strategic Alignment

Development of Cardiff Capital Region's Media Sector

Foundations: the Clwstwr Programme

Economic, social and cultural impacts

Comparative growth in the UK media sector
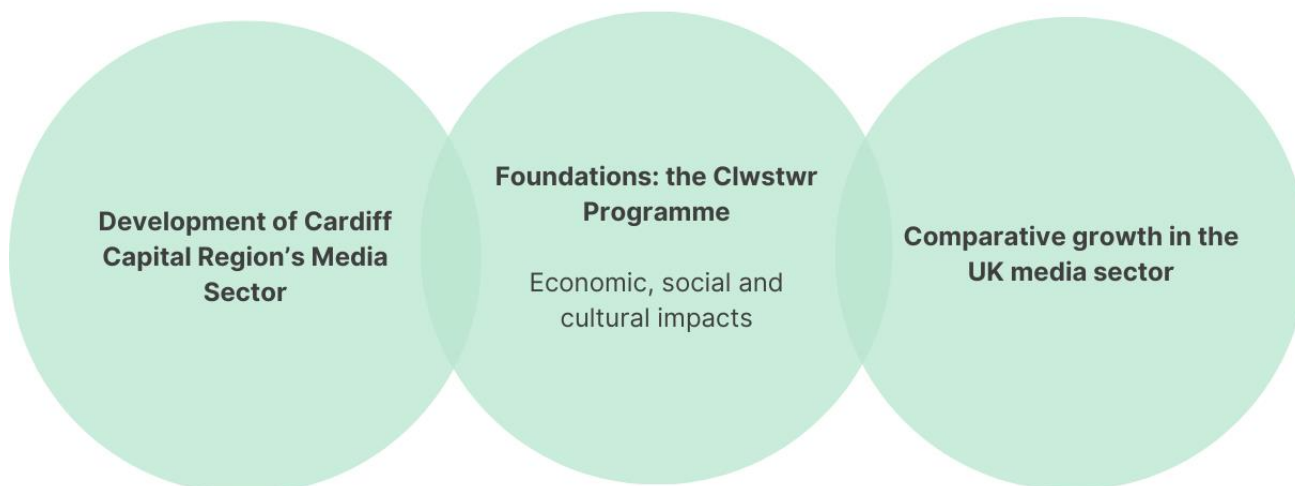
This section aims to assess in how far the Media Cymru strategy aligns with the wider industry and local sector context and developments. With the aim to turn the Cardiff Capital Region (CCR) – the 10 local authorities around Cardiff - into a global hub for media innovation with a focus on green and fair economic growth, the activities of Media Cymru are targeted at the CCR media sector. By focusing on this sector, Media Cymru can build on several key strengths in the local media cluster as well as target specific local challenges.

Development of CCR's Media Sector

Wales is not untypical of many European nations and regions. As one of the world's first industrial nations, its history is bound up with mining and manufacturing, industries which have been in steady decline since the 1970s. Like many post-industrial places, the creative industries have become increasingly important to the Welsh economy, particularly in the CCR.[3]

While the creative industries are clustered throughout Wales, they are concentrated in and around Cardiff, the Welsh capital, and across South Wales.[4] Today, more than 15% of enterprises in Cardiff are in the creative industries. Over the last decade, Wales has seen particular growth in the film and TV sectors: South Wales now has more TV studios than anywhere in the UK outside London, and the CCR is the UK's third largest film and TV industry employer after London and Manchester.[5]

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[3] Clwstwr. (2021). *Creative industries report no. 2: The media sector in the Cardiff Capital Region – Driving economic growth through audiovisual activities.* Retrieved from https://clwstwr.org.uk/sites/default/files/2021-01/Clwstwr%20Creative%20Industries%20Report%20No%202%20the%20media%20sector%20in%20the%20Cardiff%20Capital%20Region%20-driving%20economic%20growth%20through%20audiovisual%20activities.pdf
[4] A full data picture of the creative industries in Wales is available at https://www.datahubmaps.com/Creative-Economy-Atlas-Cymru/
[5] Clwstwr. (2021). *Creative industries report no. 2: The media sector in the Cardiff Capital Region – Driving economic growth through audiovisual activities.*

In recent years, the Welsh film and TV sector has produced a range of global titles in high-end TV drama - such as Doctor Who (BBC/Disney), Sherlock (BBC), His Dark Materials (HBO/BBC), Sex Education (Netflix), and has seen the rise of 'Welsh noir' TV series like Hinterland and Hidden.[6] It has provided a range of continuing series for UK broadcasters (such as Casualty, Songs of Praise and Only Connect), and is home to one of Europe's largest minority language broadcasters (S4C), making it the UK's centre for bilingual production.[7] But, like many European small nations or regions, it risks being a 'show and go' production centre, providing landscapes, backdrops and a skilled workforce but developing or keeping little of the intellectual property (IP) associated with these titles.

More generally, the success of the creative industries in Wales is fragile: 96% of creative businesses in Wales are small (very close to the UK average), supported by a large freelance workforce.[8] They have a strong desire but little capacity to innovate. They lack the time and resources enjoyed by global media and digital companies – many of which are US based - to do research and development or to exploit their IP across genres.[9]

Foundations: The Clwstwr Programme

In 2017, following an independent review of the Creative Industries led by Sir Peter Bazalgette the UK government took the decision to include the creative industries as part of an industrial strategy, to be delivered through UK Research and Innovation (UKRI).[10] This led to the launch of the Creative Industries Clusters Programme (CICP), overseen by the Arts Humanities Research Council (AHRC), tasked with funding a number of creative industries clusters across the UK.[11] In doing so, the initiative created two levels of cultural intermediary: the AHRC, on a strategic level, and UK Universities, tasked with developing, shaping and delivering the strategy. Although the volume of funding fell short of the scale and scope recommended by the Bazalgette review, it was, by AHRC standards, one of the most sizeable and significant investments ever made by an arts and humanities research council.

The successful Welsh bid to the CICP was Clwstwr (although no UK nations or regions were guaranteed funding, which was allocated on merit), led by the Centre for the Creative Economy at Cardiff University. Clwstwr was a forerunner to Media Cymru, working to develop a creative industries ecosystem that created positive social, cultural and economic impacts.

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[6] Clarke. (2022, July). *All things bleak and beautiful: the rise of Welsh noir.* Retrieved from: https://rts.org.uk/article/all-things-bleak-and-beautiful-rise-welsh-noir.

[7] S4C. (n.d.) *About Us.* Retrieved from https://www.s4c.cymru/en/about-us/

[8] Clwstwr. (2021). *Creative industries report no. 2: The media sector in the Cardiff Capital Region – Driving economic growth through audiovisual activities.*

[9] Ibid.

[10] Bazalgette, P. (2017). *Independent Review of the Creative Industries.* Retrieved from https://assets.publishing.service.gov.uk/media/5a8219cfe5274a2e8ab577f4/Independent_Review_of_the_Creative_Industries.pdf

[11] Clwstwr. (2023). *A model for research, development and innovation in the creative industries.* Retrieved from: https://clwstwr.org.uk/sites/default/files/2023-06/Clwstwr_A%20model%20for%20research%2C%20development%20and%20innovation%20in%20the%20creative%20industries_Web.pdf.

Clwstwr's economic impact

A central aim of the Clwstwr programme was to demonstrate the value of an ecosystem approach – where, for example, 100 companies might each create or sustain an average of two jobs (meaning 200 jobs across the cluster) rather than investment in one large company creating or sustaining 200 jobs. The benefits of RD&I are both uncertain and long-term, and it remains too early to provide a full assessment of the programme's economic impact (many of Clwstwr's successful projects are still in a commercialisation phase). Nonetheless, the Clwstwr evaluation indicates that the programme's support of innovative creative businesses has already had tangible and significant economic benefits, directly contributing to a boost in Clwstwr-funded companies' business performance.[12]

These included generating a significant amount of match funding for RD&I across the programme. Clwstwr's £3.42 million direct investment into funded projects generated a further £2.47 million investment by the funded businesses through match funding mechanisms. To date, projects that have been supported through Clwstwr have also received further investment of more than £5 million, a figure that is expected to rise as projects move closer to market. So even at this comparatively early stage in the RD&I cycle, Clwstwr's investment of £3.42 million has generated a further direct investment of £7.47 million.[13] Over a period that saw significant disruption following the COVID-19 pandemic, Clwstwr-funded companies grew by 14.6% in turnover and 21.3% in employment, compared to an average decline of 3.2% in turnover and 11.3% in employment in the Welsh creative industries as a whole.[14] Clwstwr-funded companies thus experienced strong rates of growth during a time period directly impacted by the COVID-19 pandemic. Applying these average growth numbers, Clwstwr funding directly contributed to £7,755,570 in additional turnover and 137 additional jobs, and, through indirect and induced effects, to a total of £20,446,443 in additional turnover and 446 additional jobs in the local creative industries.[15] Every £1 of direct funding spent by Clwstwr created returns of £5.98 in turnover and £4.55 in GVA. Clwstwr funded companies also experienced a 600% increase in the production of intellectual property.[16]

Clwstwr's social and cultural impacts

While Clwstwr supported projects with a wide variety of social and cultural goals, positive outcomes were most demonstrable in three areas: enhancing diversity and inclusion for both cultural producers and audiences; creating more sustainable forms of creative production; and enhancing the quality of democratic participation. Overall, Clwstwr's survey of Clwstwr-funded businesses shows that sociocultural forms of innovation become more central to their RD&I. At the start of the programme, only 19% of all Clwstwr-funded projects reported undertaking innovations with societal goals. By the end of the programme, this proportion more than doubled to 41%.[17] Overall, the results of diversity monitoring surveys show that, by the completion of the programme, Clwstwr's funded cohorts were fully representative of Wales and the CCR

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[12] Clwstwr. (2023). *A model for research, development and innovation in the creative industries*. Retrieved from: https://clwstwr.org.uk/sites/default/files/2023-06/Clwstwr_A%20model%20for%20research%2C%20development%20and%20innovation%20in%20the%20creative%20industries_Web.pdf.

[13] Ibid.

[14] Ibid.

[15] Ibid.

[16] Ibid.

[17] Clwstwr. (2023). *A model for research, development and innovation in the creative industries*. Retrieved from: https://clwstwr.org.uk/sites/default/files/2023-06/Clwstwr_A%20model%20for%20research%2C%20development%20and%20innovation%20in%20the%20creative%20industries_Web.pdf.

in terms of gender, ethnicity, age, sexual orientation and trans identity, and more diverse than the creative industries workforce as a whole. This included a significant shift during the development of the programme, so that funded cohorts became increasingly likely to be female-led with each funding year.[18]

Clwstwr also supported a number of projects that used innovation to strengthen equality, diversity and inclusion (EDI) within the creative industries while also making content and services more accessible to audiences. The increasing scale and urgency of the climate crisis meant encouraging and supporting a range of initiatives to increase media sector environmental sustainability in production technology, content and awareness. Clwstwr developed a green innovation approach to support an innovative, sustainable ecosystem that included the development of green technologies. This approach aimed to minimise environmental damage and degradation, improve the quality and accessibility of green resources, increase the affordability of green media production and have a positive impact on business creativity and green identity. At the start of the programme less than one fifth (19%) of Clwstwr-funded companies reported innovations having an environmental impact. By the end of the programme, nearly half (49%) linked innovation to environmental goals. Clwstwr funded eight projects that foregrounded green innovation goals, and 20% of all 118 Clwstwr projects registered a positive environmental impact as an outcome of their innovation.[19]

Comparative Growth in the UK Media Sector

In order to help measure the impact of Media Cymru, we have used 2021 as a baseline year (the year before Media Cymru became operational) - discussed in more detail in Section 3 below. At that time, growth in the CCR media sector sat against a backdrop of growth in spending on media production in the UK and globally. In 2021, the global media market was predicted in 2021 to see a 5-6% yearly growth in spending on media content and this presents opportunities for further development of the sector in the CCR.[20] This growth began to slow considerably from 2023.

By examining Cardiff within the context of other clusters in the UK, we can begin to understand the diverse baselines and needs that are present within each region and the targeted support and policy change necessary to develop and nurture clusters. The CCR has been categorised as a 'creative challenger' by Nesta on the basis of an examination of the evolution and growth of creative clusters.[21] Based on an analysis of composite indicators across the cluster regions, data suggests that the CCR is 'less favourable' in the areas of access to finance and exporting, however 'more favourable' in relation to access to skills and innovation.[22]

Based on the analysis of the baseline data we can find that despite efforts by broadcasters to devolve TV production, London remains - overwhelmingly – the centre for media production in the UK, accounting for

[18] Ibid.
[19] Clwstwr. (2023). *A model for research, development and innovation in the creative industries*
[20] Fodor, M. M., Komorowski, M., & Lewis, J. (2023). *Report update: The size and composition of the creative industries in Wales in 2022*. Retrieved from https://clwstwr.org.uk/sites/default/files/2023-09/Creative%20Industries%20Report%20No%201_3_Final.pdf
[21] Nesta. (2018). *Creative nation: How the creative industries are powering the UK's nations and regions*. Retrieved from https://media.nesta.org.uk/documents/creative_nation-2018.pdf
[22] Frontier Economics. (2022). *Understanding the growth potential of creative clusters*. Retrieved from https://assets.publishing.service.gov.uk/media/6363ef4b8fa8f57a29a23a92/Understanding_the_growth_potential_of_creative_clusters_-_accessible.pdf

more than 80% of all UK media turnover.[23] Outside Greater London, in this baseline year, Cardiff emerges as a major centre for media production, with roughly 3,400 employees and £420 million in turnover making the city the third largest media production centre in the UK outside London, after Manchester and Sheffield. Table 2.1 also gives a sense of broader regional media clusters, with South Wales and South West emerging as a major hub for media in the UK, with almost 9,000 employees and almost £1.2 billion in turnover - the highest turnover in the UK outside London.

Table 2.1 – City level comparisons of the media sector in terms of turnover and employees in 2021 [24]

Region	City	Number of employees	Turnover
London	London	105,000	£30 billion
South Wales and South West England	Cardiff	3,400	£420 million
	Bristol	3,700	£290 million
	Swansea	1,600	£450 million
North West	Manchester	7,600	£1 billion
	Liverpool	1,600	£130 million
Yorkshire and The Humber	Leeds	1,300	£100 million
	Sheffield	3,900	£484 million
Scotland	Glasgow	3,300	£430 million
	Edinburgh	1,700	£120 million
West Midlands	Birmingham	3,000	£280 million
Northern Ireland	Belfast	1,500	£160 million

[23] Clwstwr. (2023). *Creative industries report: The media sector in the Cardiff Capital Region*. Retrieved from https://indd.adobe.com/view/publication/2d5086d2-0669-403e-b024-9f8e1775ce3f/xqg2/publication-web-resources/pdf/Media_Sector_in_Cardiff_Capital_region_.pdf
[24] Clwstwr. (2023). *Creative industries report: The media sector in the Cardiff Capital Region*. Retrieved from https://indd.adobe.com/view/publication/2d5086d2-0669-403e-b024-9f8e1775ce3f/xqg2/publication-web-resources/pdf/Media_Sector_in_Cardiff_Capital_region_.pdf

2.2 Policy Alignment

Figure 2.2 – Media Cymru Policy Alignment

UK Government Policy

- Strength in Places Fund (2017-2026)
- Levelling Up programme (2021)
- Creative Industries Sector Vision (2023-2030)
- Creative Industries Sector Deal (2018)

Welsh Government and Regional Policy

- Prosperity for All: Economic Action Plan (2017)
- Programme for Government (2021)
- Wellbeing of Future Generations (Wales) Act (2015)
- Creative Wales (2020)
- Cardiff Capital Region City Deal (2016); Regional Economic & Industrial Plan

International Policy

- United Nations Paris Agreement (2015)
- United Nations Sustainable Development Goals (2015)

Various policy initiatives have recognised the importance of the media sector as part of the creative and cultural industries and specific regions for economic, social, and cultural development. These are summarised in Figure 2.1 above and are explored in more detail below. Media Cymru's strategy is built on and bridges policies from various levels including UK government policy, Welsh and regional policies as well as international policies. This section aims to assess in how far Media Cymru's strategy aligns with the policy context.

UK Government Policy Context

The recent UK government elections led to the publication of a new Industrial Strategy in October 2024 by Business and Trade Secretary Jonathan Reynolds and Chancellor Rachel Reeves.[25] This strategy, the first of its kind in seven years, places creative industries among eight key areas targeted for long-term investment and innovation. By prioritising these sectors, the UK government demonstrates its commitment to leveraging their potential to drive economic growth.

For programmes like Media Cymru, which align closely with these priorities, the Industrial Strategy suggests increased support, funding opportunities, and a stable policy environment. This approach, shaped by the agenda of the new administration, aims to boost investor confidence, encourage long-term planning, and ensure that sectors like the media sector are well-positioned to contribute significantly to the economic future of the UK. In addition to the Industrial Strategy, there are various other relevant initiatives and programmes underpinning the alignment of Media Cymru with UK government policy.

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[25] UK Government. (2024, October 13). *Industrial strategy launch to hardwire stability for investors.* Retrieved October 29, 2024, from https://www.gov.uk/government/news/industrial-strategy-launch-to-hardwire-stability-for-investors

Strength in Places Fund (SIPF) (2017-26)

Launched in 2017 by UKRI, SIPF takes a place-based approach to addressing regional disparities in productivity and economic growth across the UK.[26] The fund supports collaborative projects that harness local strengths and drive economic benefits, fostering strong partnerships between research organisations, businesses, and local stakeholders. Media Cymru is one of 12 SIPF projects (see Figure 2.3) being used to boost economic growth across the UK, with a total of £314 million being invested. Media Cymru and MyWorld, led by the University of Bristol, focus on the creative industries and creative technology.[27]
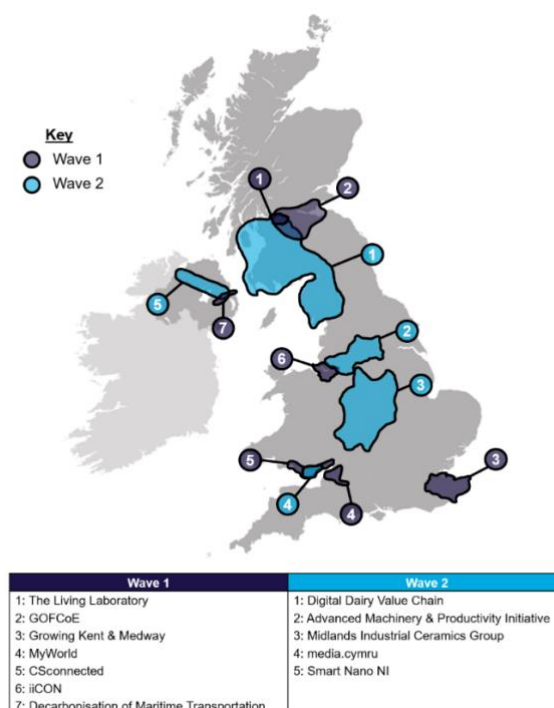
Levelling Up programme (2021)

The UK government's Levelling Up programme was initiated around 2021 to address economic disparities and create prosperity across all parts of the UK, with a strong focus on areas outside of London and the South East.[28] The timeline for this programme includes the release of the Levelling Up White Paper in February 2022, outlining key missions and goals to be achieved by 2030. The Levelling Up White Paper notes that many of the worst areas of deprivation are found in the most successful cities and some of these cities (including Cardiff) are characterised by lower productivity and incomes than their international comparators.[29] In order to boost productivity, pay, jobs and living standards, the White Paper states its ambitions to grow the private sector and central to this is investment outside the South East England region, particularly within RD&I. Media Cymru aims to support the media sector in the region, driving innovation, economic growth, and job creation – objectives that are in line with the Levelling Up programme's goals.

DCMS Creative Industries Sector Vision (2023-2030)

In 2023, the Department for Media, Culture and Sport (DCMS) launched its Creative Industries Sector Vision, in which it detailed its plan to "drive growth, build talent, and develop skills" in the media sector.[30] The department's goals and objectives for the sector, all with deadlines set to 2030, include economic growth and innovation, education, skills, employment and wellbeing, environment and global reach. This vision is predated by the Creative Industries Sector Deal: a UK government report launched in 2018 which was

Figure 2.3 – SIPF Funding

Wave 1	Wave 2
1: The Living Laboratory	1: Digital Dairy Value Chain
2: GOFCoE	2: Advanced Machinery & Productivity Initiative
3: Growing Kent & Medway	3: Midlands Industrial Ceramics Group
4: MyWorld	4: media.cymru
5: CSconnected	5: Smart Nano NI
6: iiCON	
7: Decarbonisation of Maritime Transportation	

[26] UKRI. (2017). *Strength in Places Fund*. Retrieved from https://www.ukri.org/what-we-do/browse-our-areas-of-investment-and-support/strength-in-places-fund/

[27] MyWorld (n.d.). *About MyWorld.* Retrieved from https://www.myworld-creates.com/about-myworld/

[28] UK Government. (2021, March). *Levelling Up Fund: Prospectus.* Retrieved from https://assets.publishing.service.gov.uk/media/603f42f4e90e077dd9e3480d/Levelling_Up_prospectus.pdf

[29] UK Government. (2022, February). *Levelling up white paper*. Retrieved from https://assets.publishing.service.gov.uk/media/61fd3c71d3bf7f78df30b3c2/Levelling_Up_WP_HRES.pdf

[30] UK Government. (2023, June). *Creative industries sector vision: A joint plan to drive growth, build talent and develop skills*. Retrieved from https://www.gov.uk/government/publications/creative-industries-sector-vision/creative-industries-sector-vision-a-joint-plan-to-drive-growth-build-talent-and-develop-skills

designed to boost the growth and innovation of the creative industries, including sectors such as film, television, music, fashion, and video games.[31] Launched as part of the Industrial Strategy, the Sector Deal has a number of commitments, which include providing funding for research and development to support new creative technologies and practices, and encouraging collaboration between businesses, academia, and government to foster regional growth and support creative clusters across the UK.[32] Media Cymru focusses on the same sectors as the DCMS Creative Industries Sector Vision and aims to support RD&I and collaboration. This is well aligned across the DCMS goals.

Welsh Government and Regional Policy Context

DCMS-commissioned research from 2022 undertaken by Frontier Economics highlighted the unique positioning of media clusters in the devolved nations.[33] In these cases, existing connections between regional development policies (i.e. the CCR) and policymaking at the national level have helped to drive strategic growth. At the national level, Media Cymru supports a range of Welsh Government policies and priorities. It aligns with Prosperity for All: Economic Action Plan (2017), which is aimed at fostering inclusive growth and improving the well-being of all Welsh citizens.[34] The Welsh Government also prioritises creative industries growth in its Programme for Government, where it launched a new Production Fund, supporting screen productions, stimulating economic activity through investment, as well as nurturing Welsh screen exports.[35] Next to these there are various other national and regional policy contexts relevant for Media Cymru.

The Well-being of Future Generations (Wales) Act (2015)

The Well-being of Future Generations (Wales) Act 2015 outlines a number of goals for Wales (see Figure 2.3): (1) a more equal Wales (promoting fairness and inclusion in the sector, and equality of opportunity); (2) a resilient Wales (through the development of a future-focused sector); (3) a prosperous Wales (generating jobs and opportunities in an expanding sector); and (4) a Wales of vibrant culture and thriving Welsh language (support the production of localised content, nurturing local talent, and promoting bilingual activity).[36]

Media Cymru's design supports several of these goals. The Act also directly influences Media Cymru's 'Fair' agenda to challenge the creative sector in Wales to be one which represents the people of the nation.

Figure 2.4 – The Wellbeing of Future Generations (Wales) Act 2015 Goals

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[31] UK Government (2018). *Industrial Strategy Creative Industries Sector Deal*. Retrieved from https://assets.publishing.service.gov.uk/media/5aba68f040f0b67d64e21976/creative-industries-sector-deal-print.pdf
[32] Ibid.
[33] Frontier Economics. (2022, August). *Understanding the growth potential of creative clusters*. Retrieved from https://assets.publishing.service.gov.uk/media/6363ef4b8fa8f57a29a23a92/Understanding_the_growth_potential_of_creative_clusters_-_accessible.pdf
[34] Welsh Government. (2017). *Prosperity for all: Economic action plan*. Retrieved from https://www.gov.wales/sites/default/files/publications/2019-02/prosperity-for-all-economic-action-plan.pdf
[35] Welsh Government (2021). *Programme for Government.* Retrieved from https://www.gov.wales/programme-government
[36] The Well-being of Future Generations (Wales) Act 2015. Retrieved from https://www.legislation.gov.uk/anaw/2015/2/contents/enacted

Creative Wales

A central initiative for the media sector is Creative Wales, a Welsh Government body established to support the creative industries.[37] Creative Wales provides funding, training, and infrastructure development to support the Welsh creative industries. It also delivers against the Programme for Government's commitment to establishing a creative skills body in Wales.[38] Creative Wales is a co-funder of Media Cymru and remains actively engaged with its progress. Media Cymru aligns with Creative Wales by investing in innovation and sustainability, supporting talent development, and enhancing the global reach of Wales' creative industries. This allows for strategic co-investment. So, for example, Media Cymru trained six sustainability coordinators to work with the Welsh film and TV sector: Creative Wales then funded all six to work with companies on specific productions, thereby driving forward a common goal of moving the Welsh sector more rapidly towards net zero.

The Cardiff Capital Region

The creative industries form a priority cluster for the CCR, which is a collaboration partner in Media Cymru. The CCR City Deal is a significant investment programme which is aimed at boosting economic growth and job creation in the region by nurturing an inclusive economy, fostering and inspiring innovation, matching economic ambitions with progressive social policies.[39] By prioritising the media sector, the CCR aims to leverage its potential for driving innovation, creating jobs, and enhancing the region's cultural and economic vitality. Media Cymru aims to develop and engage with a cluster based in the CCR. Recent documentation produced by the CCR includes the Regional Economic & Industrial Plan which outlines plans to foster a regional economy that is bigger, fairer and greener showing the alignment with the pillars of Media Cymru.[40] Again, this has enabled strategic co-investment, with Media Cymru (though its partnership with Channel 4) funding R&D on the creation of one of Europe's most accessible production studios, further supported by CCR, and developed by Whisper in their Channel 4 coverage of the 2024 Paralympics.

International Policy Context

There have been a number of key developments which have resulted in the creation of policy that aims to tackle global issues such as climate change, levels of carbon emissions, and sovereignty, all of which have shaped the design of Media Cymru. Though the focus of Media Cymru is within the CCR, it exists in an international sector and aligns itself with key global strategies and policies.

The Paris Agreement

The Paris Agreement is a legal treaty on climate change, signed by world leaders internationally, it aims to hold "the increase in the global average temperature to well below 2°C above pre-industrial levels" and pursue efforts "to limit the temperature increase to 1.5°C above pre-industrial levels."[41] The agreement was a landmark event that was signed at the UN Climate Change Conference (COP21) in Paris in 2015. The Paris

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[37] Creative Wales. (2025). *About Us.* Retrieved from https://www.creative.wales/about-us
[38] Creative Wales. (2022). *Creative Skills Action Plan 2022-25.* Retrieved from https://www.creative.wales/sites/creative/files/2022-09/WG45909%20Skills%20Action%20Plan%20E_WG.pdf
[39] Cardiff Capital Region. (2025). *The City Deal.* Retrieved from https://www.cardiffcapitalregion.wales/the-city-deal/
[40] Cardiff Capital Region. (2023). *Regional economic industrial plan*. Retrieved from https://www.cardiffcapitalregion.wales/wp-content/uploads/2023/04/ccr-reip-2023.pdf
[41] United Nations Climate Change. (n.d.). *The Paris Agreement*. Retrieved August 17, 2024, from https://unfccc.int/process-and-meetings/the-paris-agreement

Agreement aims to use technology to improve resilience to climate change, to reduce greenhouse gas emissions and to work collaboratively, supporting developing countries to build capacity.[42] Media Cymru is aligned with the principles of the Paris Agreement, and their commitment to lowering greenhouse gas emissions within the media sector and establishing Wales as a testbed for a sustainably focused media sector and an exemplar of decarbonised, green media production and content development.

The Sustainable Development Goals

The United Nations Sustainable Development Goals (SDGs) were developed in 2015 as part of the 2030 Agenda for Sustainable Development which was adopted by all United Nations Member States including the UK.[43] The 17 goals represent a global partnership toward the end of deprivation and inequality and to the rise in economic growth – alongside a commitment to reducing climate change and preserving our delicate ecosystems.[44] Media Cymru can be seen to broadly support the SDGs through its vision to work collaboratively to create economic growth and develop sustainable job opportunities in the region whilst ensuring businesses consider their personal impact. Utilising the pillars of Media Cymru, we can begin to understand on a more granular level how aligned the programme truly is with the SDGs (see Figure 2.5). This will be explored further in subsequent evaluations.

Figure 2.5 – Media Cymru alignment with the SDGs

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[42] Ibid.

[43] United Nations. (n.d.). *The 17 goals*. Retrieved September 17, 2024, from https://sdgs.un.org/goals#icons

[44] Ibid.

Evaluation of strategic pillars to date

3

3.1 Growth

The Media Cymru Growth Pillar aims to support the media sector to help address the economic needs and challenges of the CCR. Growth is the main goal of Media Cymru, while the other pillars and levers aim to make the growth sustainable.

Baseline data and key challenges for the Growth Pillar

Relevant baseline data for the media sector in the CCR was calculated by Media Cymru's internal research and evaluation team for 2021 - the baseline year before Media Cymru started.[45] The study shows that about 1,300 media sector companies have been active and generated a total turnover of £485 million. The sector's Gross Value Added (GVA) exceeded £537 million, making up about 1.5% of the region's GDP. Media companies employed around 4,300 people, plus an estimated 1,677 freelancers, creating over 6,000 jobs. Major employers include BBC Cymru Wales and production companies like Bad Wolf, Boom Cymru and Rondo. The performance of the media sector in the CCR is reliant on these major players as they make up a large share of employment and generated turnover.[46]

Micro and small enterprises, along with freelancers, play an essential and growing role in the workforce yet they are often underserved by existing interventions.[47] In addition, there is a lack of RD&I and commercialisation capacity ,which has meant that the region's creative sector has high business birth rates, but low survival rates.[48] Previous research has also shown that there is a lower level of productivity in Wales compared to the UK average.[49] Research by the Creative Industries Policy & Evidence Centre (PEC) further highlights that needed venture capital finance for creative industries firms is heavily concentrated in London and the South East (63%) – with just 2% in Wales and Northern Ireland. [50] This data shows that while there are considerable strengths for growth of the media sector in the CCR, several key challenges exist:

- **Reliance on larger players:** This reliance creates vulnerability, as the industry's health is closely tied to the success and decisions of these large entities.

- **Lack of investment due to risks:** Investment in the media sector is hindered by investors' concerns about potential risks. This hesitancy limits access to necessary capital for growth and innovation.

- **Lower productivity:** The sector experiences lower productivity compared to other regions or industries. This issue affects competitiveness and can deter investment.

- **Insufficient R&D commercialisation:** There is a gap in the ability to commercialise R&D outcomes. Without effective channels to bring innovations to market, the sector misses opportunities for advancement and economic contribution, limiting its overall growth.

[45] Fodor, M. M., Komorowski, M., & Lewis, J. (2024). *Industry insights: Cardiff Capital Region's media sector in 2021*. Cardiff: Media Cymru. Retrieved from https://indd.adobe.com/view/publication/2d5086d2-0669-403e-b024-9f8e1775ce3f/xqg2/publication-web-resources/pdf/Media_Sector_in_Cardiff_Capital_region_.pdf
[46] Ibid.
[47] Easton, E., & Beckett, B. (2021). *Freelancers in the creative industries*. Creative Industries Policy & Evidence Centre. Retrieved from https://pec.ac.uk/policy-briefings/freelancers-in-the-creative-industries
[48] Welsh Government. (2022). *Business demography 2022*. Retrieved November 03, 2024, from https://www.gov.wales/business-demography-2022
[49] Henley, A. (2021). *Wales' productivity challenge: Exploring the issues* (Productivity Insights Paper No. 007). The Productivity Institute
[50] Creative Industries Policy & Evidence Centre. (n.d.). *Growth finance for the creative industries*. Retrieved October 10, 2024, from https://pec.ac.uk/state_of_the_nation/growth-finance-for-the-creative-industries/

Media Cymru's progress to date

Media Cymru aims to tackle these challenges through various activities ensuring long-term growth in the CCR media sector while highlighting the strategic importance of the sector to the regional economy. These activities include:

- **Sector investment by Media Cymru:** Media Cymru invests through its various innovation funding activities into the sector (detailed in section 4.1).

- **Research and development support:** Media Cymru partner PDR deliver R&D support – through User-Centred Design - for all the funded projects through the innovation pipeline, working closely with Alacrity to help guide projects towards successful outcomes.

- **Investment and business growth support through the Alacrity Foundation:** Media Cymru partners with Alacrity to provide business development and commercialisation expertise to the sector. Alacrity operates within Media Cymru's innovation pipeline (see section 4.1), delivering mandatory training sessions and bespoke support, offering expertise in areas including investment readiness, business acceleration, marketing and commercial bidding.

- **Start-up Club meetings by TownSq:** The innovation spaces project led by TownSq in collaboration with Media Cymru offers Start-up Club Meetings designed to equip businesses and freelancers with the skills and information needed to grow a business in the sector. To date four Start-up Club Meetings have been organised.

Through these activities, Media Cymru aims to deliver against the following Key Performance Indicators (KPIs) which align with its Growth Strategic Pillar (see Table 3.1).[51] The KPIs are based on data gathered up to October 2024 representing almost three years of Media Cymru (Q11). Strong progress has already been made against key growth sector-wide KPIs, with employment, productivity and GVA growing strongly. Since the start of Media Cymru, a total of £2,361,831 has been invested through 79 Innovation Pipeline projects (by October 2024).

Table 3.1 – KPI Alignment with the Growth Strategic Pillar

	Target	Actual (Q11)	% Progress
Sector-wide Growth KPIs (media sector in the CCR)			
KPI1. Job growth: Growth of direct full-time employment in AV sector in the CCR	1,456	861	59%
KPI2. GVA growth: Growth of direct GVA of the AV sector in the CCR supported by project activities	£115,000,000	£53,343,000	46%
KPI3. Productivity growth: Growth of the Productivity of the media sector in the CCR based on turnover per employee	£20,000	£14,506	72.5%
KPI8. Increase in total number of firms: Via new start-ups / spinouts in the media sector in the CCR	290	97	33%

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[51] It should be noted that the sector-wide KPIs are highly reliant on overall development of the local sector and therefore only indirect impacts of Media Cymru can be assumed on a short-term basis.

KPI18. Turnover growth: Growth of reported business turnover of the sector in the CCR	£265,000,000	£214,000,000	80%
Programme Growth KPIs and indicators			
Investment made through our funders	£3,500,000	£800,967	23%
Match-funding made by our partners	£6,936,978	£2,074,435	30%
Further funding leveraged by Media Cymru supported businesses and universities	-	£249,874	-

Case study: How Media Cymru Enables Growth

"Our journey through Media Cymru was transformative. Through our research project we wanted to develop a new approach to issues around aging, mental health treatment and chronic pain. This research led us to integrating the power of music, scenic virtual environments, and active listening exercises to help address mental health challenges. The R&D we did through Media Cymru helped us consider new avenues and possibilities and following an overwhelming response and lots of interest from others, we've just announced a partnership with Universal Music and are pleased to be a recipient of additional Innovate UK funding through the Mindset funding stream which has enabled us to further the research in collaboration with Cardiff University and the Centre for Trials Research. When we started Rescape we set ourselves a mission to discover ways that therapy can be fun, rewarding and impactful - a magical combination. This feels like an important step towards that goal. Being in a position to scale our ambition through the R&D process has been incredible and crucial for the company in growing our business."

Kevin Moss, Director of Product Development, Rescape Innovation Ltd

3.2 Green

The Green Strategic Pillar aims to support the CCR media sector in delivering economic growth which is more environmentally sustainable, through increased adoption of sustainable practices and funding innovations.

Baseline Data and key challenges for the Green Pillar

The media sector faces significant challenges in addressing sustainability, particularly due to the energy-intensive nature of media production. In the media sector, the large amount of travel and power required to power the film and TV industries is well documented, with the average big budget feature film production generating almost 3,000 tonnes of carbon – as much as a diesel car driven around the world 300 times.[52] The 2020 *Screen New Deal* report reported that a single day of filming can generate more carbon emissions than one person's annual carbon footprint. [53] In 2022, diesel power was used in 91% of generators on set on productions in Wales[54] and an average of 51% of emissions during production are related to travel and transport.[55] Given Wales' relatively poor public transport infrastructure - and the attraction of Wales's scenic rural areas for locations - road travel accounted for 80% of transport emissions for productions filmed in Wales during 2022.[56] The amount of waste generated by the creative sector also continues to be a challenge for film and television productions. Data gathered by Albert revealed that productions have an average of 413 tonnes of skip waste compared with just 36 tonnes of recycled waste.[57]

While Wales has taken positive steps in relation to climate policy in pursuit of the Net Zero 2030 commitment, the Climate Change Committee (CCC) Progress Review, published in June 2023 highlights that the country is not on track to meet its remaining targets. [58] Several recurring issues complicate the implementation of sustainability in the media sector. These include:

- **The absence of clear top-down directives**: Without clear guidance and leadership from industry authorities, mandating and supporting green ways of working, there is a lack of standardised practices for sustainability.

- **Questions of responsibility and the ethical and financial dilemmas**: The media sector often struggle with who should bear the cost and responsibility for implementing sustainable practices. These ethical and financial dilemmas can impede the adoption of green methods.

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[52] *Albert: A screen new deal: A route map to sustainable film production*. (2020). Retrieved from https://wearealbert.org/wp-content/uploads/2021/03/Screen-New-Deal-Report-1.pdf
[53] Ibid.
[54] *Piloting a path to net zero carbon and zero waste for the UK's film and high-end TV industry: The Screen New Deal Transformation Plan for Wales*. (2023). Retrieved from https://wearealbert.org/wp-content/uploads/2023/11/Screen-New-Deal-Transformation-Plan-for-Wales-2023-Report-Digest-English.pdf
[55] *BAFTA Albert annual review 2023*. (2023). Retrieved from https://wearealbert.org/wp-content/uploads/2024/09/BAFTA-albert-Annual-Review-2023.pdf
[56] *Screen new deal transformation plan for Wales: 2023 report digest*. (2023). Retrieved from https://wearealbert.org/wp-content/uploads/2023/11/Screen-New-Deal-Transformation-Plan-for-Wales-2023-Report-Digest-English.pdf
[57] Ibid.
[58] Saadiah Hood, Strategic Research and Insight. (2024) Creative Wales Industry Survey 2023 report. Retrieved from https://www.gov.wales/sites/default/files/statistics-and-research/2024-05/creative-wales-industry-survey-2023.pdf

Media Cymru's progress to date

Media Cymru focuses on 'greening' the media sector by building tangible benefits of sustainable practices that also create cost and time efficiencies, making sustainability a viable and beneficial goal for the media sector. To address this, Media Cymru focuses on the following key activities:

- **Screen New Deal Transformation Plan for Wales:** Members of the Media Cymru team led on securing this pilot piece of work, the first regionally focused plan of its kind. The British Film Institute (BFI) funded Screen New Deal: Transformation Plan data capture and research was commissioned by the BFI's National Lottery Research and Statistics Fund and led by BAFTA albert, Arup, working with the BFI, Creative Wales, Ffilm Cymru Wales and Media Cymru. This plan gives an overview of current policy, legislation and progress, as well as case studies of best practice to provide a single framework for the path to Net Zero. This transformation plan provides a technical route map for stakeholders in Wales to transform the film and high-end television (HETV) industry to a zero-carbon, zero-waste sector. Media Cymru's Green Pillar programme activity aligns closely with the blueprint provided by the Screen New Deal.

- **Greening the Screen Fund**: A partnership between Media Cymru and Ffilm Cymru Wales provides funding to support green innovation in the media sector. This support comprises a development fund of up to £50,000 for up to seven projects to decarbonise production activities in the media sector (in key areas identified by the Screen New Deal). It launched in May 2024, alongside a scale up fund to provide support of up to £250,000 to develop one larger scale innovation. The funds are closely linked to the wider scale up support funding of Media Cymru (see also 4.1 below).

- **Climate Stories Fund**: A partnership between Media Cymru and Ffilm Cymru Wales provides funding for up to five R&D projects for feature films or immersive experiences that tell the story of – and inform audiences about - the climate crisis in new and innovative ways. Projects will be funded for up to £20,000. Following completion of the R&D element of the project they are subsequently able to apply for further funding through Ffilm Cymru Wales to continue development of the feature film or immersive experience.

- **BBC Content Innovation Fund – round 2**: A partnership between Media Cymru and BBC Cymru Wales providing funding for five projects to explore ambitious ideas for climate TV content aimed at a mainstream audience. Projects will be funded with up to £20,000 for three-month R&D sprints to develop a new idea and deliver a pitch deck and sample sequence, which may result in the BBC (or others) commissioning the programme idea.

- **Sustainability Coordinator training:** Following the success of a pilot scheme funded by Clwstwr with Tilly Ashton from Severn Screen during their production of Havoc (for Netflix) USW delivered training for 6 Sustainability Coordinators, who were then supported by Creative Wales to be placed with companies on Welsh productions.

- **The "Greenlancer" Training by USW**: Delivered by Picture Zero and funded by Media Cymru, "How to be a Greenlancer" was a three-hour workshop open to any Welsh or Wales-based screen sector professional working in the industry on a freelance basis, who are interested in green issues. The workshop offers an engaging, straightforward guide on how freelancers can be more environmentally focused and finance conscious.

At the SIPF programme level Media Cymru is aiming to deliver against one key KPI which aligns with its Green Strategic Pillar aims, based on GHG emissions of the sector. Media Cymru also reports on indicators relating to the project, investment made, and training delivered, further supporting the Green Pillar of Media Cymru, as illustrated in Table 3.2.

Table 3.2 – KPI Alignment with the Green Strategic Pillar

	Target	Actual (Q11)	% Progress
Sector-wide Green KPI (media sector in the CCR)			
KPI6. Environmental impact: Decrease of environmental impact of local sector including GHG emissions through programme specific projects and funding streams	-600[59]	-171	28%
Programme Green KPIs and Indicators			
Investments made into Green Innovation Projects	-	£608,562	-
Number of Green Innovation Projects supported	-	19	-
Number of trained production ready sustainability coordinators (USW and Severn Screen):	-	6	-
Number of attendees at "Greenlancer" Training by USW:	-	23	-

Media Cymru saw some progress around GHG emission data for the sector, although most of its green initiatives are still in development. On a programme level, an investment of £608,562 has already been made into Greening the Screen projects. The innovation pipeline and the Greening the Screen fund funded a total of 19 projects.

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[59] Note: This KPI describes the total GHG emission reduction we aim to target and is currently being reported on through an extrapolation of emissions based on NACE average emissions evolution and triangulation for the CCR based on contribution of CCR to UK screen GVA. This indicator was originally based on Eurostat regional data which is no longer available for the UK. Hence the current level is based on a disaggregation of the overall UK emissions of the sector, and this will require further review to achieve the necessary granularity to reflect Media Cymru influence in future reports. It was also observed that there is a potential conflict between the growth ambitions of the programme and the target to reduce overall emissions. Hence, the Media Cymru team considers amending this KPI as the programme progresses to the measure of CO2e/unit GVA.

3.3 Fair

The Fair Strategic Pillar aims to capture Media Cymru's contribution towards making the CCR media sector a more equal and diverse sector, more inclusive of people from a diverse range of backgrounds so that everyone has an equal opportunity to benefit from increased economic growth of the sector through RD&I.

Baseline Data and key challenges for the Fair Pillar

Equality, diversity and inclusion (EDI) has been identified as a challenge to the sector across the UK. Latest Ofcom data suggests that in Wales, only 10% of employees in the TV and radio sector are disabled, against a benchmark figure of 22%, although employment of Minority Ethnic Groups is slightly above the benchmark, at 6%.[60] Figures from the Welsh Government for 2023 show that only 35% of the workforce in the creative industries is female, that almost 30% of workers in the sector work part time and 48% are self-employed. This compares with 48% of female workers, 26% part time, and 12% self-employed in the Welsh workforce as a whole.[61]

Media Cymru's Wales Screen Workforce Survey[62] highlighted the lack of diversity in senior and decision-maker roles in relation to gender, ethnicity, long term health conditions or disability in the screen sector. These key findings also demonstrated how 51% of men surveyed held senior roles in comparison to just 37% of women. Of those in senior roles, only 4.5% of total respondents had a long-term health condition or disability, and only 3% of total respondents came from ethnic minority groups. These figures may be compounded by the high attrition rates among women and LGBTQ+ respondents, some of whom cited poor working conditions, and long and inflexible working hours as reasons they had considered leaving the sector.

Additionally, studies on inequality in the media and screen industries have documented a range of types of discrimination and inequality. Claims for the importance of diversity and inclusion work within the screen and media sector centres on three related arguments: first, principles of social justice, equity and inclusion, second, the need to address economic inactivity and unemployment and finally, the value of representation and the power of diversity to fuel creative outputs and income generation. Key challenges for a fair media sector in the CCR include:

- **Structural inequalities in the sector:** Research points to five core systemic structures that promote and reproduce inequality: 1) a project-based model of working; 2) limited pathways to 'breaking into' industries; 3) the informality of recruitment processes; 4) workplace practices such as unsocial hours and a focus on precarious freelance work, and 5) the lack of diversity at middle to senior management level to prioritise and support increased diversity.

[60] Ofcom. (2023, December). *Equity, diversity and inclusion in TV and radio*. Retrieved from https://www.ofcom.org.uk/siteassets/resources/documents/tv-radio-and-on-demand/diversity-and-equality/reports/2023/equity-diversity-and-inclusion-in-broadcasting-2022-23/?v=330593

[61] Welsh Government. (2024). *Ad-hoc statistical requests: 24 October to 1 November 2024. Welsh Creative Sector Economic and Labour Market Statistics 2018 to 2023*. Retrieved from https://www.gov.wales/ad-hoc-statistical-requests-24-october-1-november-2024.

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

- **The lack of comprehensive EDI benchmarking**: The diverse range of sub-fields in the media sector means that EDI data is fragmented across different reports, often at specialist sector level leading to issues with comparability. Key data gaps exist with more research and data about workforce diversity in the television and film industries than in animation, videogame or visual effects industries. Unsurprisingly, variations in questions, the timing of surveys (especially considering the impact of COVID-19) and approaches to analysis make comparisons across different sector-focused data difficult.

Media Cymru's progress to date

For Media Cymru, promoting fairness is both a strategic and ethical imperative, ensuring that the sector remains competitive and vibrant on a global stage while expanding access to opportunity to local talent. Incorporating diversity within the media sector is also increasingly aligned with statutory requirements - particularly in the sectors of television, radio, and film production. Media Cymru's focus on a 'fair' sector is reflected primarily through the nature of projects funded with a specific focus on addressing industry challenges relating to equality, diversity and inclusion. Key activities of Media Cymru include:

- **Making Media Cymru processes fairer and accessible**: Media Cymru has made significant strides in ensuring fairness, accessibility, and a focus on EDI. In its first year, it established a network of practitioners to promote inclusivity in the media sector. Key initiatives included accessible communications, an annual EDI progress update, improved data tracking, and the launch of an Access Fund for tailored support. Events routinely used accessible venues and hybrid options, while fair project categories (gold, silver, bronze) were introduced to ensure equitable investment across the programme.

- **Events and training:** Media Cymru advances inclusivity in the media sector through events and training provision. This includes: the Accessible Futures Summit attended by 190 people, which enhances disability confidence and promotes the inclusion of D/deaf, Disabled, and Neurodivergent talent in productions; the 'Moho House: 2D Animation Software Training' course, which equipped eight aspiring animators with industry-standard skills, addressing a critical skills gap in Wales; and 21 trainees from 10 companies who undertook Media Cymru's 'Inclusion Accelerator' training.

- **Investment into R&D projects around fairness:** Media Cymru's commitment to fairness is evident through its investment in R&D projects that promote inclusivity and diversity. Some of these – such as Channel 4, S4C, Boom, Rondo and Unquiet Media – are part of the consortium, The Boom Cymru and Rondo Media Consortium project aims to break down socio-economic barriers by engaging with disadvantaged communities and providing work placements to diversify media industry talent. Unquiet Media's Consortium project explores challenges faced by neurodivergent individuals pursuing media careers and is developing a toolkit for companies in the sector to promote better practices in hiring and retaining neurodiverse talent. S4C's 'Transforming S4C's Digital Future' project explores the future of Welsh-language content distribution in the digital age. Channel 4 (through Media Cymru), invested in R&D to create one of Europe's most accessible production facilities in Cardiff's Tramshed. The studio was developed by Whisper and used as their production centre for coverage of the 2024 Paralympics. This allowed them to match Channel 4's commitment to matching on-screen disabled talent, with nearly a quarter of their production staff having a registered disability. Additional fair projects are funded thought the Innovation Pipeline. For example, the 'Immersive Queer Placemaking' Seed Fund project explores how immersive technology can create

commercially viable and inclusive spaces for the LGBTQ+ community. 'News for All' focuses on making news accessible to diverse audiences.

At the SIPF programme level Media Cymru is aiming to deliver against one KPI which aligns with its Fair Strategic Pillar aims, which is based on the increase in share of minorities (including ethnic minority communities, disabilities, and socio-economic factors) working in the local media sector of the CCR.[63] Additionally, Media Cymru reports on a programme level on the investments made, number of projects supported and participants in training and events around fairness, as illustrated in Table 3.3.

Table 3.3 - KPI Alignment with the Fair Strategic Pillar

	Target	Actual (Q11)	% Progress
Sector-wide Fair KPI (media sector in the CCR)			
KPI5. Share of minorities: Increase in share of minorities (including ethnic minority communities, disabilities, and socio-economic factors, etc.) working in the local media sector of the CCR	2.0%	7.2%[64]	
Programme Fair KPIs and Indicators			
Investments made into Fair Innovation Projects (Innovation Pipeline)	-	£454,031	-
Number of Fair Innovation Projects / Awards supported	-	23	-
Number of participants in Fair training and events	-	390	-

At the programme level, Media Cymru is working to build capacity for access and inclusion measures, which is reflected in their approach to making their processes fairer and accessible. Up to October 2024, a total of 23 Fair-related awards had been made across the innovation pipeline. Of these, 16 were badged as gold standard Fair projects – meaning the project is led by people with diverse lived experiences and run in alignment with 'by or with, not for' principles. £2,955,635 has been invested in the Fair pillar through Consortium partner projects and activities, with match funding this figure grows to £4,802,880. In addition, investment in the Fair pillar through the innovation pipeline currently stands at about £460,000, representing about 10% of the total innovation pipeline spend. Across the events and training opportunities through Media Cymru related to the Fair pillar, which, as of October 2024 has reached around 390 individual.

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[63] Please note, that this primary KPI, set by UKRI, is updated annually based on average numbers and extrapolation of data from representation of people who are from ethnic minority backgrounds and/or who are disabled working in sector J, in relation to all other DCMS sectors in UK (ONS and DCMS).

[64] This has been calculated utilising data from 15.2% share of non-white workers in the creative industries in the UK overall in 2022. Data comes from point 5.1 of the following report. Assumptions applied relating to ethnic minority employment in the CCR are not substantially different from the rest of the UK. Intersectional breakdowns, and Wales-specific triangulations will be developed and included in future reporting. UK Government (2024). *Economic Estimates: Employment in the DCMS sectors, January 2022 to December 2022.* Retrieved from https://www.gov.uk/government/statistics/economic-estimates-employment-in-dcms-sectors-and-digital-sector-january-2022-to-december-2022/economic-estimates-employment-in-the-dcms-sectors-january-2022-to-december-2022

Case study: How Media Cymru Makes the Sector Fairer

In 2024, the University of South Wales held its first Accessible Futures Summit, with support from Media Cymru and Creative Wales. 2021 data revealed that 21.1% of people in Wales were disabled, but that a much smaller percentage worked in the film and TV industry, with only 4.5% holding senior roles. The Summit addressed the issue via panels, talks, masterclasses, networking sessions, and exhibitor stands, outlining steps for a more inclusive screen sector in Wales.

The event featured d/Deaf, disabled, and neurodiverse (DDN) speakers and a short film presented DDN talent's experiences, highlighting the importance of patience, support, and the role of Creative Enablers. The keynote session featured three notable speakers: Andria Doherty, Sara Beer, and Kaite O'Reilly, who shared their industry experiences and suggested ways to create fair and accessible pathways for DDN talent. The Summit also launched Media Cymru-funded Gritty Talent's Inclusion Accelerator Report, aimed at fostering an inclusive environment across ten Welsh production companies. The report revealed that only 32% of survey respondents felt their workplace was inclusive and less than half were asked about their access needs. It became clear that the industry must promote itself as a viable career option and prioritise diversity in leadership roles.

The event was an opportunity to convene both DDN talent with industry and sector leaders, underlining the importance of allyship, improved promotion of the Access to Work scheme, inclusive design and the introduction of innovative new practices such as using virtual production and user-friendly script templates for neurodiverse writers. The Summit identified a series of ongoing concerns like funding, the need for further training, and finding DDN talent. Connections made during the event aimed to foster future collaborations and following the summit, new training for sector creatives by USW was launched via the TV Access project to improve accessibility in the sector and make it more inclusive.

Accessible Futures Summit – Supporting d/Deaf, Disabled and Neurodivergent Talent in the Screen Sector

3.4 Global

The Global Strategic Pillar aims to raise the profile of the CCR as a global hub for media production, building strategic long-term relationships with key international partners and clusters to drive connections, collaborations and ultimately increase exports of products and services in the sector.

Baseline Data and key challenges for the Global Pillar

The screen industry faces significant challenges in a globally competitive market, with increasing demand for talent and skills coming from overseas. This competition is further intensified by rising production costs in the UK.[65] Meanwhile, global revenue in the media market is projected to reach US\$1.592 trillion by 2024, underscoring the scale of the industry's growth potential.[66] After the UK chose to leave the EU in 2016, the Withdrawal Agreement officially came into force in early 2020.[67] Since this announcement, a wide range of sectors have been significantly impacted by the change of policy and working regulations. In the media and entertainment industry, broadcasters and the wider sector have faced challenges, including changes to territorial licensing, immigration and visa requirements for workers, mobility of talent, data access and copyright and trademarks.[68]

The CCR faces competition from highly integrated, global companies with greater capacity to invest in RD&I in a fast-moving digital media sector. The Creative Wales Industry Survey report in 2023 found that 22% of respondents cited competition from other companies as a key factor contributing to recruitment challenges in their business.[69] The workforce in the screen industry is highly mobile, with recent findings highlighting how individuals working in the sector are prone to moving to access improved opportunity.[70] Based on this, we identified the following key challenges for the Global Pillar of Media Cymru:

- **Lack of global recognition and visibility:** Despite its growing capabilities, the CCR media cluster faces challenges in establishing a global reputation as a media hub.

- **Post-Brexit regulatory and operational barriers:** Changes in territorial licensing, immigration, and visa requirements, along with evolving copyright and data access regulations, have complicated international collaboration and mobility in the media sector.

Media Cymru's progress to date

Media Cymru's global activity is focused on five areas of activity: (1) Raising the profile of the CCR media cluster in the UK and internationally; (2) Developing a presence for collaboration with other locations

[65] Communications and Digital Committee. (2022–2023). *Licence to change: BBC future funding* (1st Report, Session 2022–23, HL Paper 44). Retrieved from https://publications.parliament.uk/pa/ld5803/ldselect/ldcomm/44/4402.htm

[66] Statista. (n.d.). *Media market worldwide*. Retrieved November 01, 2024, from https://www.statista.com/outlook/amo/media/worldwide

[67] European Commission. (n.d.). *The EU-UK withdrawal agreement*. Retrieved September 17, 2024, from https://commission.europa.eu/strategy-and-policy/relations-united-kingdom/eu-uk-withdrawal-agreement_en

[68] Fitzpatrick, D., et al. (2021). *Impact of Brexit on the media, sport and entertainment industries*. Retrieved from https://www.dlapiper.com/en-gb/insights/publications/2021/01/impact-of-brexit-on-the-media-sport-and-entertainment-industries
https://www.dlapiper.com/en-gb/insights/publications/2021/01/impact-of-brexit-on-the-media-sport-and-entertainment-industries

[69] Hood, S., & Strategic Research and Insight. (2024). *Creative Wales Industry Survey 2023 report*. Retrieved from https://www.gov.wales/sites/default/files/statistics-and-research/2024-05/creative-wales-industry-survey-2023.pdf

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

that have grown into global or complimentary media clusters; (3) Building relationships and networks (with industry and stakeholders) which enable knowledge exchange, information and skills sharing as well as opening up new markets and opportunities for collaboration for media (and creative) businesses in Wales; (4) Increasing growth of transnational financial and economic networks to result in collaboration opportunities; (5) Align closely with key policy initiatives. Key activities across these focus areas to date include:

- **Stakeholder relationship development and management:** Media Cymru has undertaken work to develop a set of international contacts and partners in strategically important organisations, clusters and regions in locations across Europe and in North America and Japan. This has included developing and managing relationships with a wide range of stakeholders across the "quadruple helix" from industry, academia, policy and civil society and agreeing specific aims and objectives with identified touchpoints.

- **Engagement with networks:** Media Cymru collaborates with selected networks to enable knowledge exchange and develop collaboration opportunities. One example of this is partnering with Future Media Hubs, a network (based in Belgium and working across Europe) that fosters international cooperation and innovation in the media sector, enabling Welsh media companies to engage with European partners and access new markets.

- **Hosting incoming visits and visitors:** Media Cymru has created a range of opportunities for individuals and organisations with relevant experience to visit the cluster on incoming missions and knowledge sharing/exchange residencies. This work has provided opportunities for engagement with expertise from across the world, enabling the development of new knowledge, skills, and ideas to support the innovation activity in Wales The Innovators in Residence programme has proved a well-received part of this work which will continue until 2026.

- **International Conferences and Delegations:** Media Cymru has facilitated attendance at a range of prominent events including the Irish TV Festival (Galway), Integrated Systems Europe ISE (Barcelona), SXSW (Austin, USA), workshops with Media Cluster Norway in Cardiff and Bergen and the World Creativity Forum (Bilbao). Additionally, it has developed partnerships with global entities and clusters to enable bespoke trade missions such as a delegation visit to Los Angeles in 2023 and ongoing partnership activity with global media corporation NBC Universal.

- **Bespoke funds for global engagement:** In collaboration with S4C and Grand Scheme Media, Media Cymru launched the Global Formats Fund in early 2024, providing £10,000 in R&D funding to nine production companies. The initiative includes a specialist training programme focused on creating, financing, packaging, and selling global formats appealing to international audiences.

At the SIPF programme level Media Cymru is aiming to deliver against one KPI, which aligns with its Global Strategic Pillar namely export growth of the CCR sector and is illustrated in Table 3.4. Media Cymru may not be able to directly influence export levels in the sector but will be able to support businesses and freelancers to build key international relationships and develop capacity which can be exploited in the longer term towards creating and expanding an export pipeline.

As of October 2024, the KPI for export growth has been significantly exceeded (by 70%) and so there may be scope for introducing a stretch target for this measure in the future. Much of the programme activity against

this indicator has been at a strategic level to date, with senior staff using trade missions and major conferences to establish relationships with global partners (with 19 to date).

Table 3.4 - KPI Alignment with the Global Strategic Pillar

	Target	Actual (Q11)	% Progress
Sector-wide Global KPI (media sector in the CCR)			
KPI4. Export growth: Growth of exports (both products and services) of the media sector in the CCR	£17,000,000	£28,947,000	170%
Programme Global KPIs and Indicators			
International press coverage	-	20	-
Number of international conferences attended	-	19	-

Media Cymru has an indicator in place to capture its direct impact as a Consortium to build an international representation as a global media hub, focused on international press coverage. This indicator measures how often Media Cymru is cited in international press as a proxy for measuring the increased awareness Media Cymru is driving globally of CCR as a global media hub. Media Cymru's press and media engagement has seen a steady increase in UK-wide, European and international news coverage in financial, digital and business trade/sector outlets as well as specialist film and media-focused publications since the baseline year 2021-22. Coverage has typically focused on the availability of innovation-based funding, partnerships and initiatives with broadcasters and the growth of the CCR as a destination for film and TV production. Some noteworthy International Press on Media Cymru is included in Table 3.5 below.

Table 3.5 – Noteworthy International Media Cymru Press

Year	Location	Media Channel	Title
2021-22	USA	FinChannel	"£127 Million of R&D Funding will Boost UK Economic Growth"
	UK/Europe	BBC Media Centre	"£50m Wales collaboration for global TV, film and media hub"
	Europe	TVB Europe	"Wales launches £50 million hub for TV and film innovation"
2022-23	UK/International	Screen International / Screen Daily	"UK's Great Point Media invests in £6m Welsh virtual production hub (exclusive)"
	UK/Europe	British Cinematographer	"Media Cymru Innovation Pipeline makes £10,000 available to creators in Wales"
2023-24	UK/International	Little Black Book	"Final Pixel Academy Partners with Media Cymru to Deliver Expert Virtual Production Training"
		The Guardian	"It's £2m ploughed into Cardiff': how Doctor Who boosted the Welsh economy"
2024-25	International	World Screen	"S4C & Media Cymru Select Winners of Formats Development Funding"

			"S4C & Media Cymru Execs Discuss Format Development Scheme"
			"S4C & Media Cymru Align for Research Project"
		Real Screen	"Extra: Fremantle UK announces promotions at Thames, Naked; S4C names format fund grantees"
		GamesIndustry.biz	"Esports Wales receives £50,000 in funding"
		The Location Guide	"Fivefold studios brings virtual production to Wales"
	USA/International	Señal News	"S4C and Media Cymru join forces for a new digital project"
	Europe/International	RXTX.info	"S4C launches project to safeguard broadcaster's future"
	UK/International	The Guardian	"A fertile time': Bafta Cymru honours golden age of film and TV production in Wales"
	UK/Europe	British Cinematographer	"Media Cymru and Ffilm Cymru Wales launch new Development Fund"
			"UK's creative industries can go from strength to strength
	Europe	SVG Europe	"Paris 2024: Channel 4 opens new fully accessible remote production facility in Wales ahead of the Paralympics"
		TVB Europe	"Opinion: Paralympic broadcast innovations pave the way for further, fairer growth"

Evaluation of levers to date

4

4.1 Innovation Funding

Innovation funding is a cornerstone of Media Cymru's efforts to transform the CCR into a global hub for media. By providing targeted financial support to freelancers, SMEs, and larger Consortium projects, Media Cymru aims to drive RD&I across the media sector. The funding addresses critical barriers such as limited resources and high risks associated with developing new ideas, technologies, and business models.

Baseline Data and key challenges for the Innovation Funding lever

Technological change presents both opportunities and challenges for the creative sector. The CCR's media sector in 2021 report highlighted the role of emerging technologies such as artificial intelligence (AI), virtual reality (VR), and augmented reality (AR) in driving growth.[71] The report indicates that supporting innovation in these areas has considerable potential for stimulating economic growth. The UK Government's encouragement of technical innovation through tax incentives further supports this growth.[72] New technologies however also introduce challenges. For example, some experts suggest it could involve "almost unlimited content" generated by AI, which may not be of high quality but would be widely available and free of charge.[73] This raises concerns about the potential impact on human creators. The importance of controlling the use of AI tools and AI-generated content, particularly to protect creators' rights and fair compensation, was a central issue in the 2023 Hollywood writers' strike.[74]

Wales shows a significant underspend on R&D compared with its population share; with reports showing that with 5% of the UK population, Wales only spent 2% of the UK total R&D investment, alongside some of the lowest levels of R&D employment when compared with other regions in the UK.[75][76] While this is a persistent issue across the private sector in Wales, the country also has one of the lowest regional per capita levels of R&D spending in third and public sectors.[77] Despite the previous UK Government setting a target of 2.4% of GDP to be spent on R&D by 2027, investment in innovation in the UK lies behind that of the UK's major competitors.[78] Support for R&D has been more difficult to access since rules changed on R&D tax credits, and recent research shows that only 40% of UK media businesses had submitted R&D tax credit claims during 2023.[79] Based on a baseline assessment, the following key challenges have been identified:

[71] Fodor, M. M., Komorowski, M., & Lewis, J. (2024). *Industry insights: Cardiff Capital Region's media sector in 2021*. Cardiff: Media Cymru. Retrieved from https://indd.adobe.com/view/2d5086d2-0669-403e-b024-9f8e1775ce3f

[72] UK Government. (n.d.). *Claiming research and development tax reliefs: Guidance*. Retrieved November 17, 2024, from https://www.gov.uk/guidance/corporation-tax-research-and-development-rd-relief

[73] Communications and Digital Committee. (2023, January). *At risk: Our creative future* (2nd Report, Session 2022–23, HL Paper 125). Retrieved from https://publications.parliament.uk/pa/ld5803/ldselect/ldcomm/125/12502.htm

[74] PwC. (2024, July 16). *Insights and perspectives: Business model reinvention outlook*. Retrieved from https://www.pwc.com/gx/en/issues/business-model-reinvention/outlook/insights-and-perspectives.html

[75] Senedd Research. (2021). *Research and innovation in Wales: Research briefing*. Retrieved from https://senedd.wales/media/qrobg4st/21-11-research-and-innovation-in-wales-2021-eng-web.pdf

[76] Henley, A. (2021). *Wales' productivity challenge: Exploring the issues* (Productivity Insights Paper No. 007). The Productivity Institute.

[77] Jones, R., & Forth, T. (2020). *The missing £4 billion: Making RD&I work for the whole UK*. Retrieved from https://media.nesta.org.uk/documents/The_Missing_4_Billion_Making_RD_work_for_the_whole_UK_v4.pdf

[78] UNESCO-UIS**.** (2020). *UNESCO Institute for Statistics (UIS) database*.

[79] RSM. (2024). *A spotlight on innovation reliefs for the media industry*. Retrieved from https://www.rsmuk.com/insights/media-industry-outlook-2024/a-spotlight-on-innovation-reliefs-for-the-media-industry

- **Limited understanding of R&D in the media sector:** There is still a lack of awareness and expertise in R&D across the CCR media sector which hinders businesses' ability to engage in and benefit from innovation, limiting their competitive edge in a rapidly evolving global market.

- **Insufficient investment in R&D:** Wales consistently underperforms in R&D spending compared to its population share. This is especially true for the media sector. This underinvestment poses a significant barrier to technological advancement and economic growth within the media sector.

- **Challenges in adopting and developing new technologies:** Emerging technologies like AI, VR, and AR offer opportunities but also pose risks. The sector must navigate these challenges while fostering innovation.

Media Cymru's progress to date

Media Cymru aims to address significant technological changes and challenges within the media sector in the CCR. Its strategic interventions aim to develop future-focused infrastructure and enhance RD&I capabilities to ensure the region's media sector can thrive in a rapidly evolving digital landscape. Media Cymru has delivered innovation funding through its core partnership R&D projects (with members of the consortium, described in the WPs above) and through its Innovation Pipeline.

- **The Media Cymru Innovation Pipeline:** The Innovation Pipeline is a series of targeted funding rounds and training opportunities designed to develop companies and individuals within the media sector in the CCR and across Wales. The aim is to increase their capacity to carry out meaningful RD&I. This can be from early-stage seed RD&I funding through to scale up activity, to result in more ideas, diversity and growth to the industry. The pipeline is designed to be as inclusive as possible, with a staged series of funding rounds that enables micro-businesses and freelancers to join the pipeline at an early stage, so they might be able to compete for later rounds of funding. At different stages of the pipeline, companies and individuals are supported by Media Cymru's partners - design consultancy and applied research facility PDR and the Alacrity Foundation. PDR provides funded projects with training in User-Centred Design to support them on their innovation journey, while Alacrity provides business development and commercialisation expertise. Each funding round is an open call, where applicants apply via the Media Cymru website, supported by launch events and online briefing webinars.

  The open funding rounds available include (in chronological order): a five-day Innovation for Creatives course to support individuals thinking about starting a business or developing a first RD&I funding proposal; a three-day Ideas Lab workshop aimed at those with more experience working in the media sector; Seed Funding up to £10,000 to develop ideas for new products and services in the media sector; Development Funding up to £50,000 for businesses to develop RD&I projects that demonstrate clear potential for a tangible product or service in the media sector; Scale Up Funding of up to £250,000 for projects of significant scale and ambition that have the potential to be transformational for the media sector and deliver an international impact.

Media Cymru has also worked with their Consortium partners to provide a series of additional funding opportunities next to the innovation pipeline to the sector. The RD&I projects funded through these targeted calls have focussed on a range of themes, including climate and TV formats:

- **Greening the Screen Fund**: See more in the Section on the Green Pillar.

- **Climate Stories Fund**: See more in the Section on the Green Pillar.

- **BBC Content Innovation Fund – round 1**: A partnership between Media Cymru and BBC Cymru Wales, providing funding of £50,000 for two projects to explore innovative ways of producing factual or sport content – whether it be new formats, methods of creation or means of delivery.

- **Global Formats Fund**: See more in the Section on the Global Pillar.

As illustrated in Table 4.1, at the SIPF programme level Media Cymru is aiming to deliver against the media sector KPI on growth in R&D spending per firm in the media sector in the CCR (based on estimations of survey data assuming growth at the rate of targeted turnover growth by programme). Furthermore, we report on the number of projects supported across our various funding streams.

Table 4.1 - KPI alignment with the Innovation Funding Lever

	Target	Actual (Q11)	% Progress
Sector-wide Innovation Funding KPI (media sector in the CCR)			
KPI9. R&D spending: Growth in R&D spending per firm in the AV sector in the CCR	£12,700	£7,084	56%
Programme Innovation Funding KPIs and Indicators			
KPI13. Number of funded innovation projects: Secondary funding competition awards	100	79	79%
Number of funded projects in…			
Innovation for Creatives		27	
Ideas Lab		34	
Seed Fund (two funding rounds to date)		35	
Development Fund (one funding round to date)		24	
Scale up Fund (one funding round to date)		1	

Case study: How Media Cymru Funds RD&I

> Dark Arts is a vanguard agency at the forefront of audience services for iconic artists with culturally important music catalogues. Last year, they started a project to explore the challenges that the catalogue side of the music business faces. With the internet evolving, artists face the challenge of keeping their IP up-to-date with current technologies, trends and modern standards and formats. With the Advanced Digital Healthcheck, Dark Arts ensures ensure that their clients' digital footprints are globally competitive.
>
> "Innovation is crucial for the Welsh creative sector" - Joe Howden, Dark Arts

4.2 Community Strengthening

Media Cymru aims to strengthen the media community in Wales through a range of activities including increasing collaboration in the sector through engagement opportunities and network development, to develop skilled jobs and create the conditions for innovative new businesses to start and scale through the media ecosystem.

Baseline Data and key challenges for the Community Strengthening lever

The Creative Wales Industry Survey of 2023 noted that 69% of freelancers were finding it difficult to find jobs in the sector, and that there was a need for more visibility of the opportunities of the sector and increased promotion of network activities.[80] This survey also highlighted that one of the challenges with the retention of staff was people moving away from Wales. There have traditionally been concerns about loss of skills from Wales, as graduate students leave for employment elsewhere. Awareness of opportunities and career paths in the media sector have also been highlighted as important to provide an active workforce and retain talent.[81] In the baseline survey of the media sector conducted by Media Cymru, 38% of respondents reported that a lack of collaboration partners had a very important or important impact on their business innovation activities. Media Cymru has therefore identified the following key challenges:

- **Talent retention in Wales:** Despite high numbers of graduates in media sector related undergraduate and postgraduate courses, it has been challenging to retain skilled staff in the media sector in Wales, due to competition from other areas of the UK and abroad.

- **Knowledge of the opportunities for innovation in the media sector:** Lack of knowledge about opportunities for jobs, innovation, skills or funding has been mentioned as a challenge for freelancers and other workers of the media sector in the CCR.

- **Recognition of successful cases in Wales:** The lack of recognition of the booming media sector in the CCR obscures career possibilities and the chances of growth in the sector. This also stifles collaboration, because partners in Wales are not naturally sought after by companies elsewhere.

Media Cymru's progress to date

Media Cymru activities that have addressed these challenges include:

- **Networking events:** Events are delivered through Consortium partner activities including USW skills training, and Innovation Spaces events, Greening the Screen and Innovators in Residence activities.

- **Innovation Spaces:** Media Cymru's partnership with TownSq, with support from SHWSH, on Innovation Spaces has contributed to building community by providing spaces and events to connect freelancers and small businesses working in the sector. During the first two years Innovation Spaces has carried out 35 workshops and events, with 780 people benefiting from participation, creating networks and becoming aware of current trends in technology, skills and demand. Furthermore,

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[80] Hood, S., & Strategic Research and Insight. (2024). *Creative Wales Industry Survey 2023 report*. Retrieved from https://www.gov.wales/sites/default/files/statistics-and-research/2024-05/creative-wales-industry-survey-2023.pdf
[81] Senedd Research. (2024). *Creative industries in Wales: Policy context and key issues* (CR-LD16090). Retrieved from https://senedd.wales/media/pwkhjp24/cr-ld16090-e.pdf

these events have covered all 10 local authorities of the CCR, ensuring that participants across the whole area can benefit.

- **Media Cymru PR and communication activities:** Media Cymru has also been successful in showcasing the media sector in local, regional and national media outlets, becoming a point of reference for discussions about the sector (see highlights below). Media Cymru has built several communication channels – social media, e-newsletters, website - to introduce and engage the sector in the potential of R&D for business innovation and development.

- **Expanding on networks for collaboration:** On a wider scale, work with MyWorld to deliver a Cardiff Bristol 'Supercluster' is building links between the CCR and the West of England Combined Authority (WECA). Activities provided through the Innovator in Residence stream have allowed for participants to have valuable support and receive advice on the development of innovations in the sector (see Global pillar).

As illustrated in Table 4.2 below, at the SIPF programme level Media Cymru reports on student retention rates in order to reflect on the strength of the local media sector community. As this reflects only the general student retention rates of Wales, future reporting might be updated to better reflect the strength of the community. Furthermore, KPIs regarding events attendees are reported to show Media Cymru's community engagement reach.

Table 4.2 - KPI Alignment with the Community Strengthening Lever

|	Target	Actual (Q11)	% Progress
Sector-wide Community Strengthening KPI (media sector in the CCR)			
KPI7. Student retention rates: Increase student retention rates in the local media sector in the CCR	15.0%	23.8%	150%
Programme Community Strengthening KPIs and Indicators			
KPI11. Increasing the knowledge in the media sector in the CCR: Attendees in open events / conferences	2,500	1,701	68%

Although data relating to retention of students on media courses is not currently available, data for all Welsh domiciled students attending HE institutions in Wales and entering employment in Wales shows an increase of 23.76%; exceeding the programme-level target of 15%. It is, of course, difficult to know how this increase is reflected within the media and creative sectors, but a range of Media Cymru training, support and community building initiatives aimed at (or including) recent graduates – such as Innovation for Creatives – have encouraged talent retention. So far more than 1,700 attendees at the various events and conferences organised by Media Cymru have been registered. Furthermore, the team has successfully raised the profile of both Media Cymru and the local media sector through press coverage which has steadily increased throughout the duration of the programme (Figure 4.1). Highlights of press coverage include:

- An article in the Guardian about the impact of Doctor Who in the Welsh media sector cites a report developed by Media Cymru.[82]

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[82] Morris, S. (2023, November 23). *£2m ploughed into Cardiff: How Doctor Who boosted Welsh economy. The Guardian*. Retrieved from https://www.theguardian.com/tv-and-radio/2023/nov/23/2m-ploughed-into-cardiff-how-doctor-who-boosted-welsh-economy

- A BBC Wales Today three-minute report on the BAFTA albert Screen New Deal pilot in Wales in which Justin Lewis, Director of Media Cymru, is featured pointing out the interest of Hollywood studios for filming in Wales if it was an easy place to undertake carbon-neutral filming.[83]

- An article in the Guardian on BAFTA Cymru cites Media Cymru Deputy Director Sara Pepper and highlights information from our reports showing the developments in Cardiff and the perspective of a 'Supercluster' with Bristol.[84]

- A The Sharp End (ITV Wales) interview with Professor Marlen Komorowski, Senior Research Fellow with Media Cymru on the future of journalism for Wales based on the research undertaken for the report Of and For Wales – Towards a Sustainable Future for Public Interest Journalism.[85]

Figure 4.1 – Media Cymru press coverage

	2020	2021	2022	2023
Press coverage	6	23	31	35
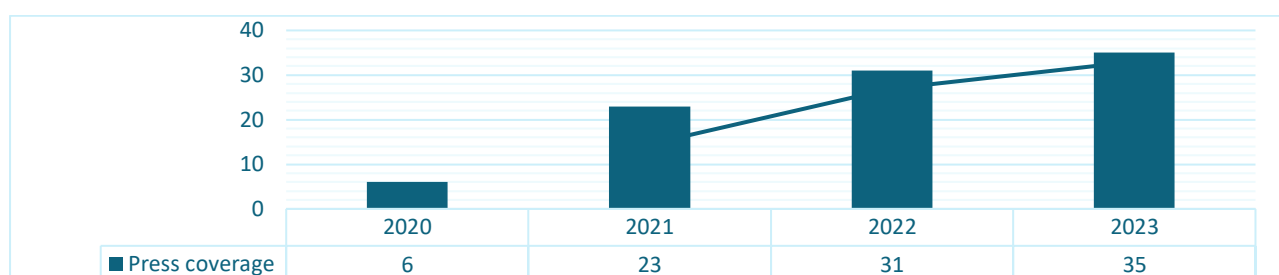
The Media Cymru communications team has a number of owned channels in which they conduct marketing activity and communications engagement. These aim to communicate project successes, securing participants and applicants in training and funding activity as well as telling the story of media innovation in the CCR. These channels are: social media including X/Twitter, LinkedIn, Instagram and YouTube; the Media Cymru website; and a series of e-newsletters including targeted mailouts on Innovation Pipeline, Media Cymru research and in Welsh. Media Cymru's social media following has continued to grow (Figure 4.2), with LinkedIn currently performing best for number of followers.

Figure 4.2 – Media Cymru social media following across platforms
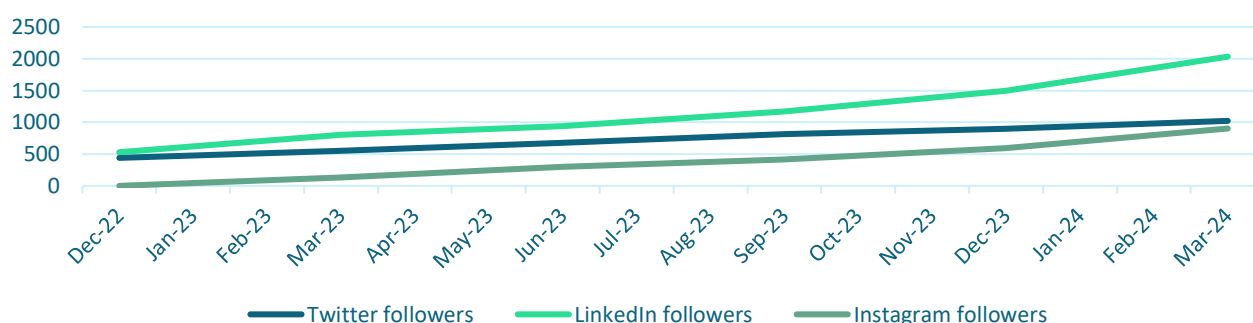
[83] BBC. (n.d.). *[BBC Cymru Wales]*. Retrieved from https://www.bbc.co.uk/programmes/m001swhc
[84] Morris, S. (2024, October 19). *BAFTA Cymru celebrate golden age of film and TV production in Wales*. Retrieved from https://www.theguardian.com/uk-news/2024/oct/19/bafta-cymru-celebrate-golden-age-film-tv-production-wales-cardiff
[85] ITV Wales. (n.d.) The Sharp End

4.3 Skills Development

Media Cymru aims to close the skills gap by leveraging university resources to develop training and education opportunities which are informed by cutting edge research and innovation expertise.

Baseline Data and key challenges for the Skills Development lever

The media sector is facing significant challenges related to skills development. According to the BFI Skills Review 2022, the film and high-end television industries in the UK will need an additional 15,130 to 20,700 full-time employees by 2025.[86] In England, pre-16 education is not adequately preparing students for careers in the creative industries[87] although the new Welsh curriculum (2022), by contrast, does have an emphasis on creativity. There have been ongoing calls for the UK government to adopt a STEAM approach with arts and design-based courses to foster a more well-rounded education.[88] A recent report from PEC has also indicated that Wales has seen a large decline in the take up of creative subjects,[89] adding to the increased pressure on the skills pipeline in the CCR media sector.

Data shows that the media industry is highly-educated – with 81% of those employed in the screen sector in Wales being educated to undergraduate degree level or equivalent – a significantly higher proportion than the UK national average of 44% across all sectors.[90] But training and education opportunities are problematic in the media sector. Freelancers comprise a significant portion of the workforce and face challenges due to working hours lost for training opportunities. Recent studies have shown that freelancers frequently miss out on life-long learning opportunities and career guidance.[91] Based on this, key challenges include:

- **The need for structured training pathways:** This should not only address current skills shortages but also anticipate future industry needs, to ensure a steady talent pipeline to support sector growth.

- **Addressing of (technology) skills gaps in the sector:** Through providing investment in training and upskilling opportunities businesses and freelancers in the sector should be supported to keep pace with technological advancements.

- **Ensuring upskilling pathways are in place**: New to the industry roles are relatively well served by training providers. Provision for mid- and established-career stage individuals is needed to support those that want to progress within the sector and for the sector to retain talent, with a particular focus on support for freelancers.

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[86] British Film Institute. (2022, June). *BFI skills review 2022* (p. 8). Retrieved from https://www.bfi.org.uk/industrydata-insights/reports/bfi-skills-review-2022

[87] Communications and Digital Committee. (2023, January). *At risk: Our creative future* (2nd Report, Session 2022–23, HL Paper 125). Retrieved from https://publications.parliament.uk/pa/ld5803/ldselect/ldcomm/125/12502.htm

[88] Creative Industries Policy & Evidence Centre. (n.d.). *Skills, talent and diversity in the creative industries: Critical issues and evidence gaps.* Retrieved September 5 2024, from https://pec.ac.uk/discussion_paper_/skills-talent-and-diversity-in-the-creative-industries-critical-issues-and-evidence-gaps/

[89] Giles, L., Carey, H., & Hickman, B. (2024). *Creative further education in the four UK nations*. Creative PEC State of the Nations Research Series. Creative Industries Policy and Evidence Centre. https://doi.org/10.5281/zenodo.12532918

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

[91] Easton, E., & Beckett, B. (2021). *Freelancers in the creative industries*. Creative Industries Policy & Evidence Centre. Retrieved from https://pec.ac.uk/policy-briefings/freelancers-in-the-creative-industries

Media Cymru's progress to date

Skills development is vital to building a pipeline of talent to service the needs of the sector in Wales. Media Cymru has supported skills mainly through WP2: Developing Future Capabilities. Activities include:

- **Innovation Spaces** (Town Square and SHWSH): Innovation Spaces has delivered a wide range of events for start-ups and scaling businesses in the media sector. Many of these have taken the form of thematic sessions under the banner of the Creative Collective – offered free of charge or at very low cost to participants.

- **Skills and Training project by USW:** The partnership with USW on Skills and Training was developed to deliver skills and training which bridges education and industry. The collaboration aims to build a pipeline of talent as well as providing professional development for existing businesses and individuals working in the sector. Provision includes: Freelancer Development Fund to enable freelances to access training; Sustainability Coordinators training and placements programme; Greenlancer training; the Inclusion Accelerator programme supporting companies to be more inclusive; the Reset programme for working parents; Virtual Production Essentials; Moho animation training and placements. The training has been underpinned by conducting a skills survey to measure skills gaps in the sector, the Wales Screen Workforce Survey 2022,[92] and by continuous dialogue with local industry partners.

- **Building of training capacity in the region:** Where possible local training providers and organisations have been engaged to produce bespoke training content for Media Cymru, creating additional capacity to train within the CCR. Where possible training programmes have been delivered in partnership and linked to placements (e.g. Sustainability Coordinators in partnership with Creative Wales) and as part of additional funded opportunities (e.g. Global Formats in partnership with S4C). These training plus (placements or funding opportunities) have been particularly competitive.

- **The Sustainability Coordinator programme:** The programme was a particularly innovative and complex training and placements programme, working with Severn Screen's Sustainability Manager Tilly Ashton to develop and deliver an eight-part training programme, with training sessions taking place in Bad Wolf Studios, Dragon Studios, Great Point Studios and Aria Studio. Six individuals (from varied backgrounds, some with Film and TV experience, others with sustainability experience) took part in the training and, in partnership with Creative Wales, were subsequently supported on a three- to four-month placement on productions based in Wales. Initial feedback from the productions on the introduction of Sustainability Coordinators has been positive. The demand from productions for trainee placements far outnumbered the available trainees, suggesting that there will be a strong demand for this role going forward.

- **Skills events:** USW has also delivered events supporting wider learning and awareness, closely linked with Media Cymru's Fair pillar. In March 2023 USW hosted and ran the Culture Change Conference[93]. Welcoming 140 attendees over two days, focused on instilling broader cultural change in the screen sector working environment, including the working lives of freelancers. The Accessible Futures[94]

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

[93] Media Cymru USW. (2023, March). *Culture Change Conference.* Retrieved from https://www.eventbrite.co.uk/e/media-cymru-usw-culture-change-conference-tickets-560349098237

[94] University of South Wales Centre for the Study of Media and Culture in Small Nations. *Accessible Futures Summit.* Retrieved from https://culture.research.southwales.ac.uk/research/media-cymru/accessible-futures-summit/

event in September 2024 welcomed 190 attendees to the Royal Welsh College of Music and Drama, with a focus on access and accessibility in the screen sector, with a high proportion of d/Deaf, disabled and neurodivergent speakers and a panel providing examples of lived experience and best practice.

Table 4.3 – KPI Alignment with the Skills Development Lever

	Target	Actual (Q11)	% Progress
Programme Skills Development KPIs and Indicators			
KPI10. Strengthening skills in media sector in the CCR: number of participants in Training Sessions	250	401	170%
KPI14. Number of training events and workshops: Increase number of workshops / events / local engagement for skill development and knowledge spillovers	60	59	99%
USW participants in training	-	175	-
Training / workshop provision by USW	-	25	-

As illustrated in Table 4.3, Media Cymru has already exceeded its target for number of training participants in skills development training, with more than 401 participants across its various offers. The number of training and workshop activities is close to being achieved by October 2024.

4.4 Knowledge Creation

Media Cymru wants to share its acquired knowledge with fellow researchers, industry and policy makers to highlight best practices and develop insights that help refine and expand conceptual and theoretical models around innovation in the media sector.

Baseline Data and key challenges for the Knowledge Creation lever

The debates about the creative and cultural industries and their importance for sustainable and fair economic growth has been analysed by academics all over the world.[95] These discussions take into account the dual nature of the creative industries: its role in job creation and financial growth, as well as providing the space for creatives to elevate culture and improve people's lives.[96] From a both an academic and policy standpoint, a critical perspective is needed to examine the activities of the creative industries and hold them accountable in terms of fairness and sustainability. On the other hand, achievements and successes of practitioners in the sector should also be acknowledged to provide a nuanced picture of their potential in economic and social terms. There are many difficulties in addressing an industry that is at once constantly evolving and innovating, while at the same time facing considerable pressures by relying heavily on project-based activities and freelancing work. Some key challenges include:

- **Obtaining specific data on the media sector in Wales:** Because of its population size, most survey samples for the UK prove too small to provide sufficient information around many aspects (e.g. diversity of the workforce) of the media sector in Wales.

- **Recognising the potential of clusters and partnerships:** Clusters have been highlighted for their potential to improve sectors by promoting exchange, reducing costs, enabling complex interaction and highlighting job opportunities. Detailed information about cluster development is fundamental to understanding the mechanics at play that foster or hinder sector development.

- **Evidence of successful approaches to RD&I in the media sector:** There is a need to provide more examples and successful case studies that highlight the impact of innovation in the media sector. Through those successes, an increase in R&D spending could be fostered, leading to further growth.

Media Cymru progress to date

Media Cymru aims to produce robust, tangible research outputs, to capture and disseminate knowledge developed through the programme. Members of the delivery team have attended various conferences to disseminate learning about the sector/skills related needs of the creative industries. In the 2023-24 delivery period, a total of 12 appointments/indicators of formal recognition were recorded across the team, including invitations as keynote speakers for conferences and appointments to advisory bodies. Some outputs are delivered as academic publications.[97] Ten academic publications have been produced to date, doubling the

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[95] See, for instance, Ashley, A. J., Loh, C.G., Bubb, M.R. & Goldberg-Miller, S.B.D. (2024). *The Creative Economy.* Routledge; Wesner, S. (2025). *Researching the Creative and Cultural Industries.* Routledge. Rieple, A., DeFillippi, R. & Schreiber, D. (2023). *Transformational Innovation in the Creative and Cultural Industries.* Routledge. O'Connor, J. (2024). *Culture is not an Industry.* Manchester University Press. Peris-Oritz, M., Cabrera-Flores, M.R., & Serrano-Santoyo, A. (2019). *Cultural and Creative Industries: A Path to Entrepreneurships and Innovation.* Springer.

[96] Scott, E. (2022). Arts and creative industries: The case for a strategy. https://lordslibrary.parliament.uk/arts-and-creative-industries-the-case-for-a-strategy/ ; PEC (2021). *A Global Agenda for the Cultural and Creative Industries.* https://pec.ac.uk/policy_briefing_entr/a-global-agenda-for-the-cultural-and-creative-industries/

[97] Researchfish (n.d.) https://researchfish.com/

original publications target of five. This is illustrated in Table 4.4 below. Among the publications there have been contributions stemming from econometric analysis, as well as the successful application of the mentoring process of the Innovation Pipeline through PDR (Cardiff Met) activities with the funded applicants. Other notable outputs have included the first 'Industry Insights' report presenting the baseline economic data for the sector in the CCR and the development of the Creative Economy Atlas Cymru, a data source for the creative and media sector in the CCR and beyond. The main activities can be summarised as follows:

- **Creative Economy Atlas Cymru (https://www.creativeatlas.cymru/):** This interactive map of Wales showcases various actors in the creative sector in Wales and makes their presence visually tangible. By organising the information under different classifications and allowing for focus on specific regions, it provides a useful tool for policymakers and creative workers alike to recognise the number of possibilities and opportunities in the country. It is the first of its kind in the UK.

- **'Industry insights' report series**: The first publication of the 'Industry Insights' series provides an up-to-date analysis of the media sector in the CCR based on 2021 data and sets the basis for regular publications in the series to trace the development of the sector throughout Media Cymru.

- **Screen Industries Workforce Survey:** This survey carried out by USW filled a gap in knowledge around the specific needs of the sector in Wales and highlighted the main challenges and opportunities for training in the sector which would inform their training strategy and offer (see in the Section on Skills Development).

Table 4.4 – KPI Alignment with the Knowledge Creation Lever

	Target	Actual (Q11)	% Progress
Programme Knowledge Creation KPIs and Indicators			
KPI15. Number of academic publications: Number of A1 international peer-reviewed academic journal publications	5	10	200%
Sector reports	-	3	-

4.5 Policy Engagement

Media Cymru aims to provide evidence-based information to and advise governmental institutions in order to enable the implementation of policies that support the sustainable growth of the media sector.

Baseline Data and key challenges for the Policy Engagement lever

The creative industries have been a UK success story, but they need to be backed by tailored, supportive government policies to thrive. The Creative Industries Sector Vision Paper highlighted the importance of research and evaluation to promote policy development.[98]

- **Informed policy-making:** Media Cymru provides up-to-date information on the risks and challenges that have a bearing on the development of the media sector and recommend avenues to mitigate or overturn those challenges.

- **Navigating a new media environment:** Incomplete and insufficient data have been the main concerns in a sector that is heavily reliant on self-employed, freelance and part-time work. Media Cymru provides qualitative and quantitative survey and econometric data to evidence the changes or need for changes in the structural strategies and support for the media sector in Wales and inform policy decisions.

Media Cymru progress to date

Media Cymru's contribution is being harnessed to provide evidence at the national level, supporting Senedd committee meetings and facilitating events disseminating the results of Wales-wide research to inform policy development. These engagement activities and policy briefs have been cited in reports of the Senedd, with direct reference to Media Cymru and its research staff as key sources of information. Some examples of our policy engagement include:

- Media Cymru provided written and oral evidence that is quoted in the Senedd Cymru/Welsh Parliament **Culture shock: Culture and the new relationship with the European Union** report by the Culture, Communications, Welsh Language, Sports and International Relations Committee (2024, November).[99]

- Professor Justin Lewis, Director of Media Cymru, is quoted extensively in the Senedd Cymru/Welsh Parliament **Research and Development** report by the Economy, Trade and Rural Affairs Committee (2024, May).[100]

- The **Final Report** by the Independent Commission on the Constitutional Future of Wales (2024, January) cites the research on Broadcasting Regulation in Wales by the collaboration between Media Cymru and the Institute of Welsh Affairs. The Final Report also includes reference to **A new future**

[98] Department for Digital, Culture, Media and Sport. (2023). *Creative industries sector vision: A joint plan to drive growth, build talent and develop skills.* Retrieved from https://www.gov.uk/government/publications/creative-industries-sector-vision/creative-industries-sector-vision-a-joint-plan-to-drive-growth-build-talent-and-develop-skills#chapter-4-delivery

[99] Senedd Research. (2024, November 24). *Culture shock: Culture and the new relationship with the European Union.* Retrieved from https://senedd.wales/media/mymnfoxa/cr-ld16778-seasneg.pdf

[100] Senedd Research. (2024). *Wales' cultural sector: Current challenges and future opportunities* (CR-LD16486). Retrieved from https://senedd.wales/media/m3qc40id/cr-ld16486-e.pdf

for Broadcasting and Communication in Wales report by the Expert Panel on a Shadow Broadcasting and Communications Authority for Wales which received evidence from Media Cymru, and from the Wales Public Interest Journalism Working Group of which Professor Marlen Komorowski is a member.[101]

- Professor Justin Lewis and Professor Tom Ware, on behalf of Media Cymru, provided written and oral evidence and are cited in the Senedd Cymru/Welsh Parliament **Behind the Scenes: The Creative industries workforce** report by the Culture, Communications, Welsh Language, Sports and International Relations Committee (2023, October).[102]

- Professor Justin Lewis and Professor Sara Pepper were invited to brief a closed session of the Culture, Communications, Welsh Language, Sport, and International Relations Committee June 2023.

- Enrique Uribe Jongbloed was invited to give evidence to the Welsh Government on Culture and the new relationship with the EU (2024, February).

The Media Cymru team have also contributed to policy at a UK and international level, for example:

- Professor Justin Lewis was invited to present to the CONTRAST symposium on Creative Clusters Policy in Bilbao (2023, November)

- Professor Sara Pepper chaired the AGHRC Creative Industries Clusters Programme Assessment and Interview Panels (2024).

- Professor Sara Pepper presented to the UKRI Creative Industries Advisory Working group (CIAG) (2024, July).

The importance attributed to Media Cymru as a source for these reports evidences the impact that research in shaping informed policy developments and are illustrated in Table 4.5. These exemplify the commitment to translating research into evidence-based policy implementation.

Table 4.5 – KPI Alignment with the Policy Engagement lever

	Target	Actual (Q11)	% Progress
Programme Policy Engagement KPIs and Indicators			
KPI12. Impact on policy developments: Participation in consultations / expert advisory sessions	10	7	70%
KPI17. Number of policy briefs published: Increase policy engagement and create briefings to impact policymaking based on programme evidence	6	2	33%

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[101] Independent Commission on the Constitutional Future of Wales. (2024, July). *Final report*. Retrieved from https://www.gov.wales/sites/default/files/publications/2024-07/independent-commission-on-the-constitutional-future-of-wales-final-report.pdf
[102] Senedd Research. (2023). *Creative industries in Wales: Policy context and key issues* (CR-LD16090). Retrieved from https://senedd.wales/media/pwkhjp24/cr-ld16090-e.pdf

Conclusions

5

As a result of interim evaluation activity, we have been able to draw several key conclusions from the operations of Media Cymru thus far, as well as the key challenges for the second half of the programme. These are summarised below.

The CCR is emerging as a global media innovation hub focused on green and fair economic growth. Media Cymru builds on Clwstwr, a creative innovation programme that generated £7.47 million in direct returns, boosted company turnover, and enhanced social and environmental sustainability. The CCR, as of 2021, ranks as the UK's third-largest media production centre outside London. Despite successes, challenges remain in retaining intellectual property, accessing finance, and exports. Media Cymru leverages these insights to foster sector growth amid increasing global media production spending. Media Cymru aligns with UK, Welsh and international policies to drive inclusive growth, innovation, sustainability and job creation in the creative industries.

Progress within Strategic Pillars to date

The four strategic pillars of Green, Fair, Global and Growth all demonstrate positive progress in each area at the interim evaluation stage:

- The **Growth** Pillar addresses challenges such as dependency on major players, low investment, weak productivity, and limited R&D commercialisation. Media Cymru initiatives at the interim stage include innovation funding, business support via Alacrity Foundation, and TownSq Start-up Clubs. By October 2024, key Growth KPIs showed job and productivity growth. Since the start of Media Cymru, a total of £2,361,831 has been invested through 79 Innovation Pipeline projects (by October 2024).

- The **Green** Pillar supports sustainable economic growth by promoting green practices and funding innovation. The media industry faces challenges due to its energy-intensive operations, high emissions from transport and production, and waste management issues. Key initiatives include the Greening the Screen Fund, Climate Stories Fund, BBC Content Innovation Fund, the innovation pipeline and the Sustainability Coordinator training aimed at decarbonising media activities. Progress includes £608,562 invested in 19 green projects and ongoing efforts to reduce sector GHG emissions, achieving a 28% decrease so far.

- The **Fair** Pillar promotes inclusivity and diversity in the CCR media sector by addressing structural inequalities and fostering equal opportunities. Challenges include underrepresentation of women, ethnic minorities and disabled individuals in senior roles, toxic working environments and limited data on equality metrics. Media Cymru initiatives include accessible processes, the Accessible Futures Summit, training programs like Inclusion Accelerator, and investments in R&D projects such as News for All. By October 2024, £460,000 had been invested in 23 Fair-related projects, supporting 390 participants. Overall sector statistics show an increase in minority representation to 7.2%, exceeding a 2% target since the beginning of Media Cymru.

- The **Global** Pillar aims to establish the CCR as a global media hub by fostering RD&I capabilities, international partnerships, and increasing exports. Challenges include global competition, rising UK production costs, limited foreign investment, and post-Brexit regulatory barriers. Progress includes building international networks, hosting global delegations, attending major events like SXSW, and launching funds like the Global Formats Fund. Partnerships with entities such as NBC Universal drive innovation and market access. By October 2024, export growth reached £28.9 million, surpassing the £17 million target by 70%, (of which Media Cymru's role was part of a general picture) with 19 international conferences attended and increasing global press coverage.

Lever Progress to Date

- **Innovation Funding**: Media Cymru addresses resource constraints and high risks in adopting emerging technologies like AI, VR, and AR. Challenges include limited R&D investment in Wales and a lack of sector expertise. Key initiatives include the Innovation Pipeline, offering seed, development, and scale-up funding, along with targeted funding like BBC Content Innovation Fund. By October 2024, 79 innovation projects were funded, achieving 79% of the target.

- **Community Strengthening:** Networking events, Innovation Spaces, and PR efforts have built connections and showcased achievements. Partnerships including the development of the Cardiff-Bristol 'Supercluster' have been created to strengthen cross-regional ties. Over 1,700 people have attended events, while student retention rates increased to 23.8%, surpassing targets. Media Cymru's communication efforts have elevated the sector's profile, securing press coverage and expanding social media engagement, reinforcing its role as a central player in Wales' media landscape.

- **Skills Development:** Key challenges include skills shortages, and limited training for mid-career professionals. Despite 81% of Wales' screen sector workforce holding degrees, freelancers often lack access to upskilling opportunities. Media Cymru's initiatives include Innovation Spaces events, USW-led training programmes, and the Sustainability Coordinator scheme. These efforts support talent retention, technological upskilling and inclusivity. As of October 2024, over 401 participants engaged in training organised by Media Cymru, exceeding targets.

- **Knowledge creation:** Key challenges include limited data on the Welsh media industry, the need to recognise the value of clusters and partnerships, and the lack of case studies showcasing successful innovation. To address these, Media Cymru has produced academic publications, such as the Industry Insights report and the Creative Economy Atlas Cymru, which highlights key actors in Wales' creative sector. Additionally, a workforce survey identified sector challenges and informed training strategies. Media Cymru has also exceeded its academic publication target, producing 10 publications to date.

- **Policy engagement**: Key challenges include insufficient data on the sector, particularly regarding freelance and part-time workers, and shifting working conditions. Media Cymru contributes to policy development by presenting research findings to governmental institutions, including the Senedd. Notably, their evidence has been cited in several key reports, such as the Culture Shock and Creative Industries Workforce reports, and the Final Report by the Independent Commission on the Constitutional Future of Wales. These efforts demonstrate Media Cymru's influence on policymaking through rigorous research.

Annex – Media Cymru KPIs

KPI	KPI Description	Strategic Pillar	Related Lever
KPI1	Job growth: Growth of direct full-time employment in AV sector in the CCR (based on productivity increase through programme reaching UK average)	Growth	-
KPI2	GVA growth: Growth of direct GVA of the AV sector in the CCR supported by project activities (based on productivity increase through programme reaching UK average)	Growth	-
KPI3	Productivity growth: Growth of the Productivity of the media sector in the CCR based on turnover per employee (full-time, direct employment, in GBP)	Growth	-
KPI4	Export growth: Growth of exports (both products and services) of the media sector in the CCR (cross checked with service export of J sector in CCR from ONS data)	Global	-
KPI5	Share of minorities: Increase in share of minorities (including ethnic minority communities, disabilities, and socio-economic factors, etc.) working in the local media sector of the CCR (based on average numbers and extrapolation of data from ethnic minority community representation in sector J and all DCMS sectors in UK)	Fair	-
KPI6	Environmental impact: Decrease of environmental impact of local sector including GHG emissions through programme specific projects and funding streams (based on tonnes, all air pollutants and greenhouse gases for the screen industry - NACE 59, 60 - extrapolation of average emissions evolution and triangulation for the CCR based on contribution of CCR to UK screen GVA)	Green	-
KPI7	Student retention rates: Increase student retention rates in the local media sector in the CCR (data based on general retention rate in Wales of graduates from HEI in Wales)	Growth	Knowledge creation
KPI8	Increase in total number of firms: Via new start-ups / spinouts in the media sector in the CCR	Growth	-
KPI9	R&D spending: Growth in R&D spending per firm in the AV sector in the CCR (based on estimations of survey data assuming growth at the rate of targeted turnover growth by programme)	Growth	-
KPI10	Strengthening skills in media sector in the CCR: number of participants in Training Sessions	-	Community strengthening
KPI11	Increasing the knowledge in the media sector in the CCR: Attendees in open events / conferences	-	Skills development
KPI12	Impact on policy developments: Participation in consultations / expert advisory sessions	-	Policy engagement

KPI13	Number of funded innovation projects: Secondary funding competition awards	Growth	Innovation funding
KPI14	Number of training events and workshops: Increase number of workshops / events / local engagement for skill development and knowledge spillovers	-	Skills development
KPI15	Number of academic publications: Number of A1 international peer-reviewed academic journal publications	Global	Knowledge creation
KPI16	Comms indicators: Website visits	-	Community strengthening
KPI17	Number of Policy Briefs published: Increase policy engagement and create briefings to impact policymaking based on programme evidence	-	Policy engagement
KPI18	Turnover Growth: Growth of reported business turnover of the sector in the CCR	Growth	

Glossary of Terms

Term	Meaning
AHRC	Arts Humanities Research Council
AI	Artificial Intelligence
AR	Augmented Reality
AV	Audio-visual
CCC	Climate Change Committee
CCR	Cardiff Capital Region
CICP	Creative Industries Clusters Programme
EDI	Equality, Diversity and Inclusion
EU	European Union
GHG	Greenhouse Gas
GVA	Gross Value Added
HETV	High-end Television
KPI	Key Performance Indicator
QRM	Quarterly Report Meeting
RD&I	Research, Development and Innovation
SDGs	Sustainable Development Goals
SIPF	Strength in Places Fund
SMEs	Small and Medium Enterprises
tCO2e	Tonnes of Carbon Dioxide equivalent
UKRI	UK Research and Innovation
USW	University of South Wales
VR	Virtual Reality
WPs	Work Packages

Contact Us

+44(0)2922 511 434
Media.cymru@cardiff.ac.uk

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media cymru

Media Cymru
City Hall
Cathays Park
Cardiff, CF10 3ND