



media cymru

Industry Insights Cross-city comparison of the media sector in 2023

October 2025

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Supported by Impactonomix

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THE EXPERTS' COLLECTIVE

This report presents the main findings of the **first cross-city analysis of the media sector in the UK based on data from 2023**.

It is part of the Industry Insights report series published by the **Centre for the Creative Economy** and **Media Cymru**. The series provides a regular overview of the scale and scope of the Cardiff Capital Region's (CCR) media sector and the creative industries across Wales.¹

¹ Please find all publications of the series via
<https://media.cymru/our-research/> & <https://www.cardiff.ac.uk/creative-economy/research/research-projects>

The focus of this study is on the media sector (adapted from the audiovisual sector as defined by DCMS):

- Motion picture, video and television programme production activities
- Motion picture, video and television programme post-production activities
- Motion picture, video and television programme distribution activities
- Sound recording and music publishing activities
- Radio broadcasting
- Television programming and broadcasting activities
- News agency activities
- Other information service activities
- Renting of video tapes and disks (this is a redundant sector currently)
- Leasing of intellectual property and similar products, except copyrighted works
- Publishing of computer games
- Ready-made interactive leisure and entertainment software development.

This study is based on data provided from registered companies via the FAME database, as of Spring 2025, and was treated as follows:

Steps of analysis	Our new approach
Adding new cities	Added Dundee, Nottingham and Brighton & Hove to the city comparison.
Geography	Researched city boundaries from reputable sources, i.e. gov.uk, Doogal, municipal websites, etc., and defined the accepted boundaries for media sector activities of all comparator cities.
Data cleaning, outliers and partial reports	Cleaned data from every city, identifying and researching outliers and handling partial reports which led to desk research on Companies' House, the firms' own websites and annual accounts, etc.
Adding major media companies	Manually identified and then extracted all relevant data from all major media companies (e.g. Royal Charter) missing from FAME.
Dealing with data imputation	Extracted and estimated all the missing information specific at a city-level.

Please note that the here-presented data deviates slightly from our previous reports due to the new identified city boundary of Cardiff to enable comparison with other cities. We refer here to Cardiff in the analysis which includes: CF3, CF5, CF10, CF11, CF14, CF15, CF23, CF24.

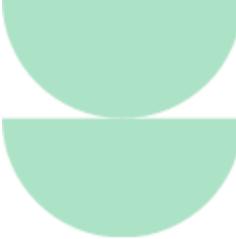
For detailed information about the research approach please consult our full reports from the Industry Insights report series and reach out to us.

FINDINGS: Cardiff's media sector



Region	City	Number of employees			Turnover (millions of GBP)			Number of businesses			Direct GVA		
		2023	% change 17/23	% change 09/23	2023	% change 17/23	% change 09/23	2023	% change 17/23	% change 09/23	2023	% change 17/23	% change 09/23
London	London	129,360	27%	153%	51,000	49%	219%	31,552	26%	306%	14,000	68%	396%
South Wales and	Cardiff	4,262	41%	141%	630	44%	152%	1,024	84%	470%	150	33%	175%
South-West	Bristol	3,865	42%	152%	380	36%	206%	1,248	23%	283%	150	35%	475%
England	Swansea	806	35%	230%	160	15%	13%	168	0%	305%	80	40%	165%
North-West	Manchester	7,309	5%	54%	920	1%	37%	1,041	21%	379%	500	42%	199%
	Liverpool	2,060	12%	13%	110	-86%	-82%	532	34%	330%	70	-67%	88%
South-East	Brighton & Hove	2,660	6%	346%	80	-69%	45%	1,486	7%	283%	70	-18%	343%
Yorkshire and The	Leeds	1,801	43%	-34%	130	90%	-70%	487	13%	323%	40	29%	33%
Humber	Sheffield	4,378	96%	808%	450	124%	796%	806	24%	365%	180	164%	1693%
Scotland	Glasgow	3,687	-3%	8%	440	20%	67%	999	34%	316%	160	-7%	81%
	Edinburgh	1,995	28%	94%	150	7%	23%	683	23%	269%	70	7%	200%
	Dundee	924	104%	1100%	110	463%	2703%	113	19%	297%	60	1107%	2320%
Midlands	Birmingham	1,598	-27%	-40%	140	-54%	-39%	1,027	21%	328%	90	-54%	123%
	Nottingham	1,002	12%	586%	90	220%	565%	482	21%	330%	40	185%	859%
Northern Ireland	Belfast	3,273	14%	22%	360	33%	24%	569	41%	409%	140	40%	98%

Note: reference year of 2017 was chosen because the first investment programme, Clwstwr, was started in 2018.



- **Cardiff's media cluster has moved into the top cohort of UK cities** with only London and Manchester having higher overall **turnover**. If we exclude the BBC, Cardiff and Manchester are of similar size.
- Cardiff's media cluster **shows particularly strong growth in the period 2017–2023**, (especially the latter half) **across a wide range of metrics** (turnover, employment, the number of businesses, overseas exports and R&D activity all experienced substantial growth).
- An **84% increase in the number of businesses in the Cardiff region** is **more than double** the next highest growth rate in the UK (34%).



FINDINGS: Cardiff's media sector



Region	City	Overseas Exports (millions of GBP)			R&D Expenditure (millions of GBP)		
		2023	% change 17/23	% change 09/23	2023	% change 17/23	% change 09/23
London	London	12,500	27%	153%	560	41%	400%
South Wales and South-West England	Cardiff	70	41%	141%	20	60%	240%
	Bristol	120	42%	152%	30	10%	185%
	Swansea	10	35%	230%	3	13%	86%
North-West	Manchester	70	5%	54%	20	3%	101%
	Liverpool	30	12%	13%	10	23%	235%
South-East	Brighton & Hove	30	6%	346%	10	-69%	36%
Yorkshire and The Humber	Leeds	20	43%	-34%	10	4%	223%
	Sheffield	140	96%	808%	20	23%	273%
Scotland	Glasgow	60	-3%	8%	10	11%	93%
	Edinburgh	30	28%	94%	10	36%	441%
	Dundee	10	104%	1100%	2	23%	224%
Midlands	Birmingham	20	-27%	-40%	20	16%	229%
	Nottingham	20	12%	586%	4	21%	230%
Northern Ireland	Belfast	30	14%	22%	10	28%	158%



- The region's **60% growth in R&D spend is significantly higher than any other city** (the next highest being London at 41%).
- This is the clearest indicator of the **impact of UKRI's investment in *Clwstwr* and *Media Cymru***, initiatives focused on creating new business activity through R&D.
- The accelerated growth rate in the second half of that period is consistent with the impact of this R&D investment.

FINDINGS: City comparison

Region	City	Number of employees		Turnover (millions of GBP)		Number of businesses		Overseas Exports (millions of GBP)		R&D Expenditure (millions of GBP)	
		2023	% change 17/23	2023	% change 17/23	2023	% change 17/23	2023	% change 17/23	2023	% change 17/23
London	London	129,360	27%	51,000	49%	31,552	26%	12,500	27%	560	41%
South Wales and South-West England	Cardiff	4,262	41%	630	44%	1,024	84%	70	41%	20	60%
	Bristol	3,865	42%	380	36%	1,248	23%	120	42%	30	10%
	Swansea	806	35%	160	15%	168	0%	10	35%	3	13%
North-West	Manchester	7,309	5%	920	1%	1,041	21%	70	5%	20	3%
	Liverpool	2,060	12%	110	-86%	532	34%	30	12%	10	23%
South-East	Brighton & Hove	2,660	6%	80	-69%	1,486	7%	30	6%	10	-69%
Yorkshire and The Humber	Leeds	1,801	43%	130	90%	487	13%	20	43%	10	4%
	Sheffield	4,378	96%	450	124%	806	24%	140	96%	20	23%
Scotland	Glasgow	3,687	-3%	440	20%	999	34%	60	-3%	10	11%
	Edinburgh	1,995	28%	150	7%	683	23%	30	28%	10	36%
	Dundee	924	104%	110	463%	113	19%	10	104%	2	23%
Midlands	Birmingham	1,598	-27%	140	-54%	1,027	21%	20	-27%	20	16%
	Nottingham	1,002	12%	90	220%	482	21%	20	12%	4	21%
Northern Ireland	Belfast	3,273	14%	360	33%	569	41%	30	14%	10	28%

Note: Top 6 and leading city marked.

- **Cardiff** is in the top 6 – and leading in 2 - **in all 10 metrics** shown in our summary table, overtaking other cities and showing its strength in both volume and growth rates.
- **London, Sheffield** (top 6 across 8 metrics) and **Bristol** (top 6 across 7 metrics) also show consistent strength.
- While **London** remains by far the largest and most dominant cluster, it does not lead in any area of growth and is outside the top 6 in growth of employees and overseas exports.
- While **Manchester** remains an area of strength, it's growth since 2017 has been much slower than many other cities.
- Coming from a lower base, **Dundee** has seen exceptional growth, with the fastest UK growth in employment, turnover and exports.

- **Brighton** has more businesses in the sector than anywhere outside London, and while its growth over the last 15 years has been strong, this has tailed off markedly since 2017, with significant falls in turnover and R&D spend.
- **Sheffield** has seen very strong turnover growth but more modest growth in the number of businesses (around 60% of its turnover comes from Sumo and Sumo Digital).
- **Glasgow** has seen strong growth in the number of businesses but a slight drop in overall employment.
- Although **Liverpool** has seen good growth in the number of companies, its overall turnover has dropped significantly.
- **Bristol/Cardiff** is the UK's strongest region/corridor outside London, followed by **Liverpool/Manchester**.

FINDINGS: Development over time

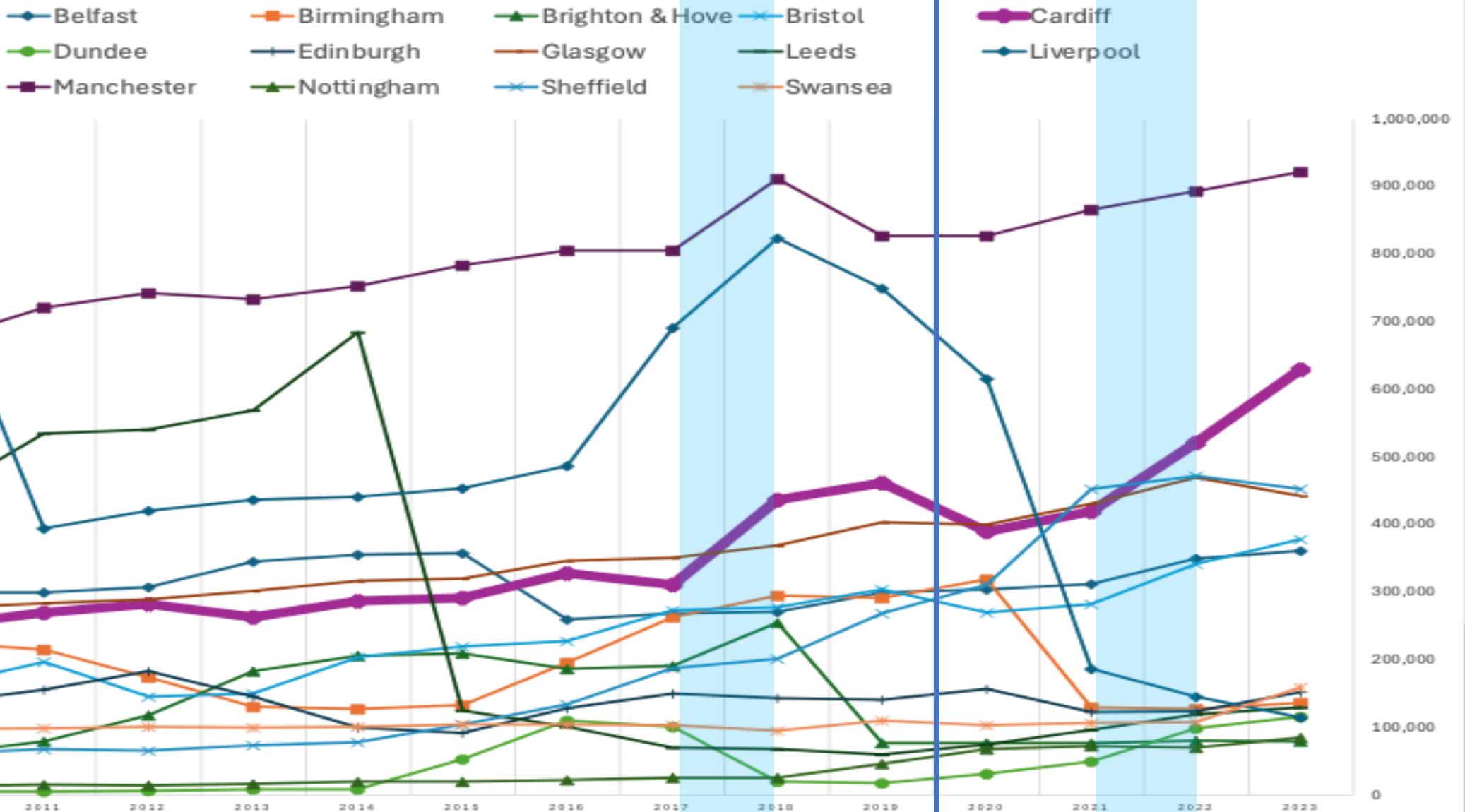


Start of
Clwstwr

COVID-19 impact

Start of Media Cymru

EVOLUTION OF MEDIA TURNOVER IN THOUSANDS OF GBP, 2009-2023

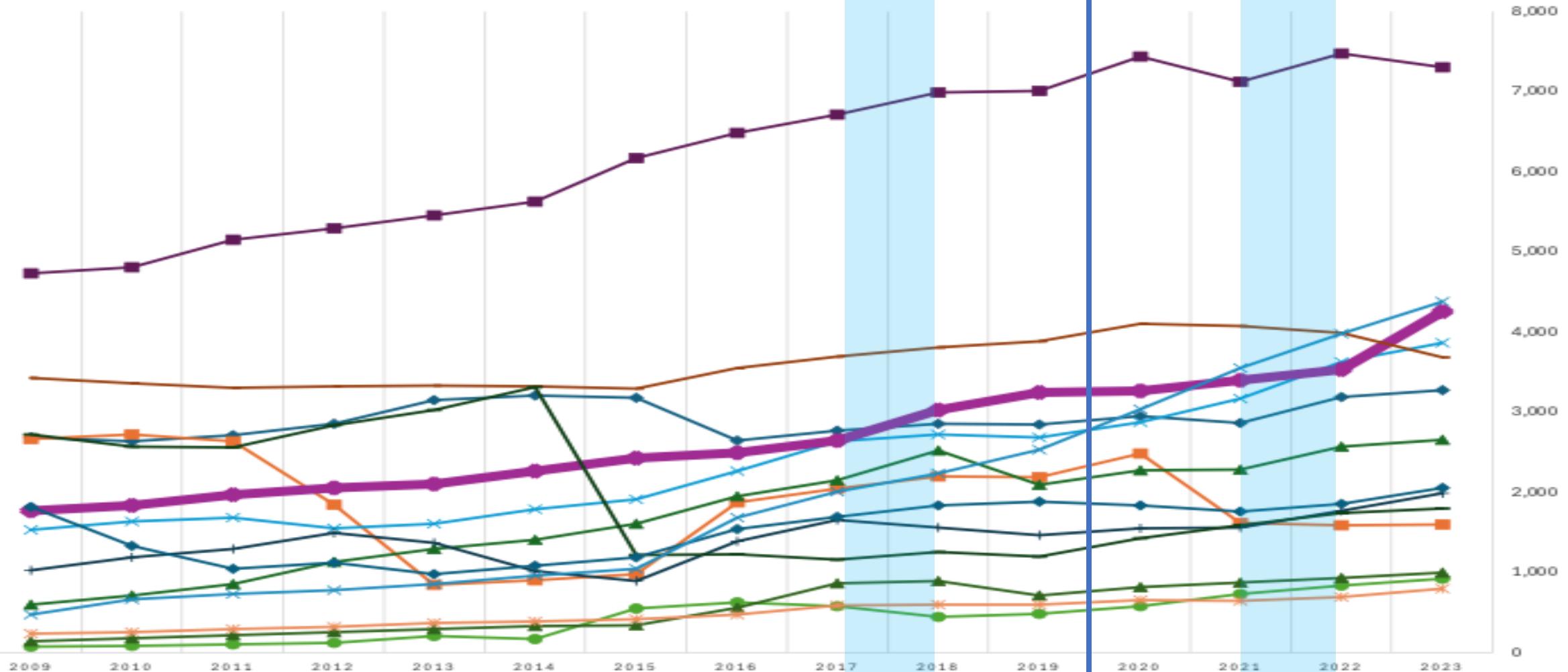


Start of
ClwstwrCOVID-19
impactStart of
Media Cymru

EVOLUTION OF THE NUMBER OF FTE-S IN THE MEDIA SECTOR, 2009-2023

Legend for cities:

- Belfast (dark blue line)
- Birmingham (orange line)
- Brighton & Hove (green line)
- Cardiff (purple line)
- Dundee (light green line)
- Edinburgh (dark blue line)
- Glasgow (brown line)
- Leeds (dark green line)
- Liverpool (teal line)
- Manchester (dark purple line)
- Nottingham (dark green line)
- Sheffield (light blue line)
- Swansea (orange line)

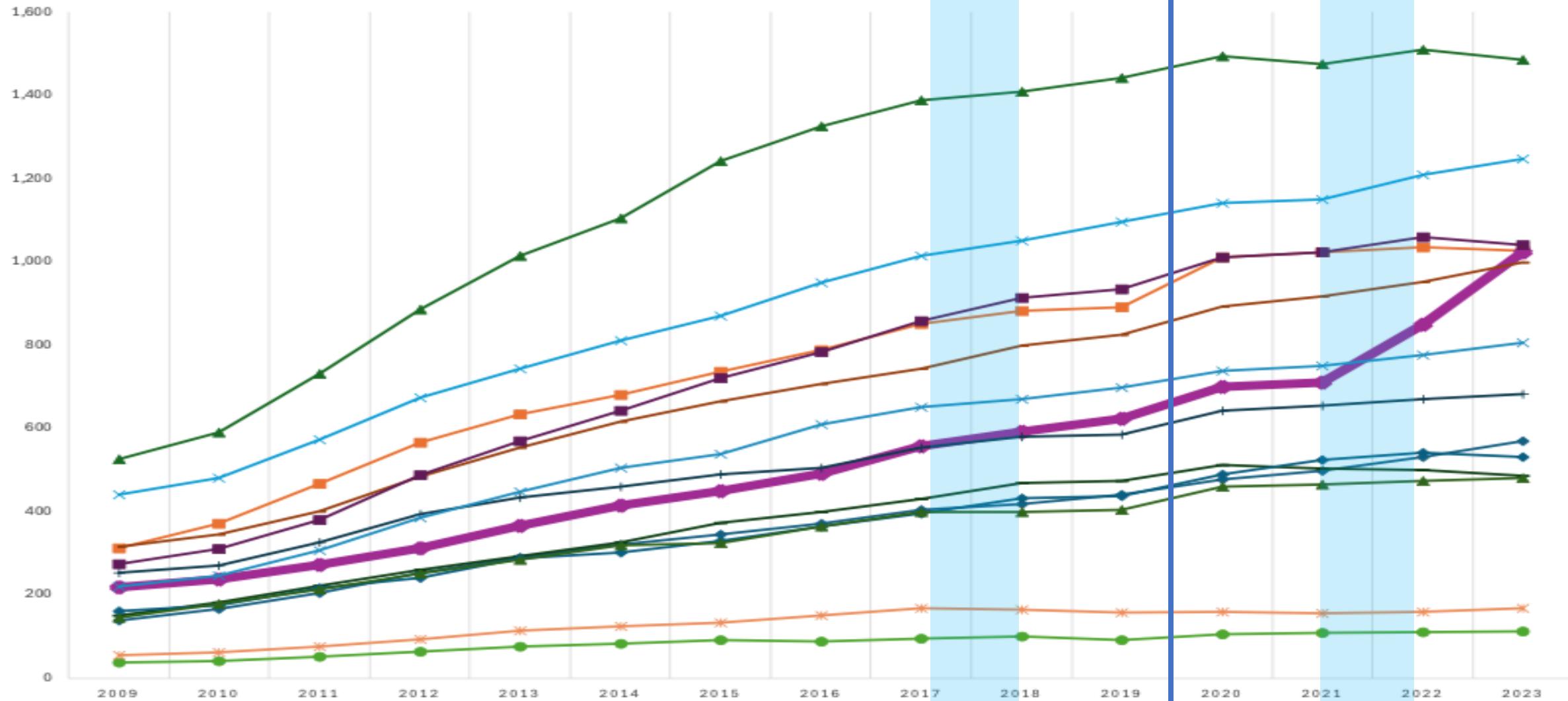


Start of
ClwstwrCOVID-19
impactStart of
Media Cymru

EVOLUTION OF THE NUMBER OF BUSINESSES IN THE MEDIA SECTOR, 2009-2023

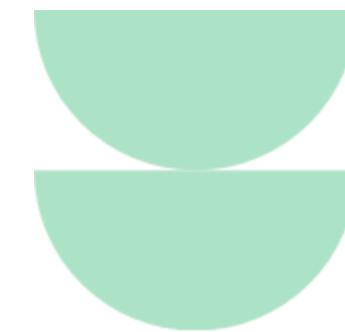
Legend:

- Belfast (Blue diamond)
- Glasgow (Orange square)
- Birmingham (Red square)
- Leeds (Green square)
- Brighton & Hove (Green triangle)
- Liverpool (Blue diamond)
- Cardiff (Purple square)
- Nottingham (Green triangle)
- Bristol (Blue cross)
- Sheffield (Blue cross)
- Edinburgh (Dark blue line)
- Swansea (Orange asterisk)
- Dundee (Green circle)





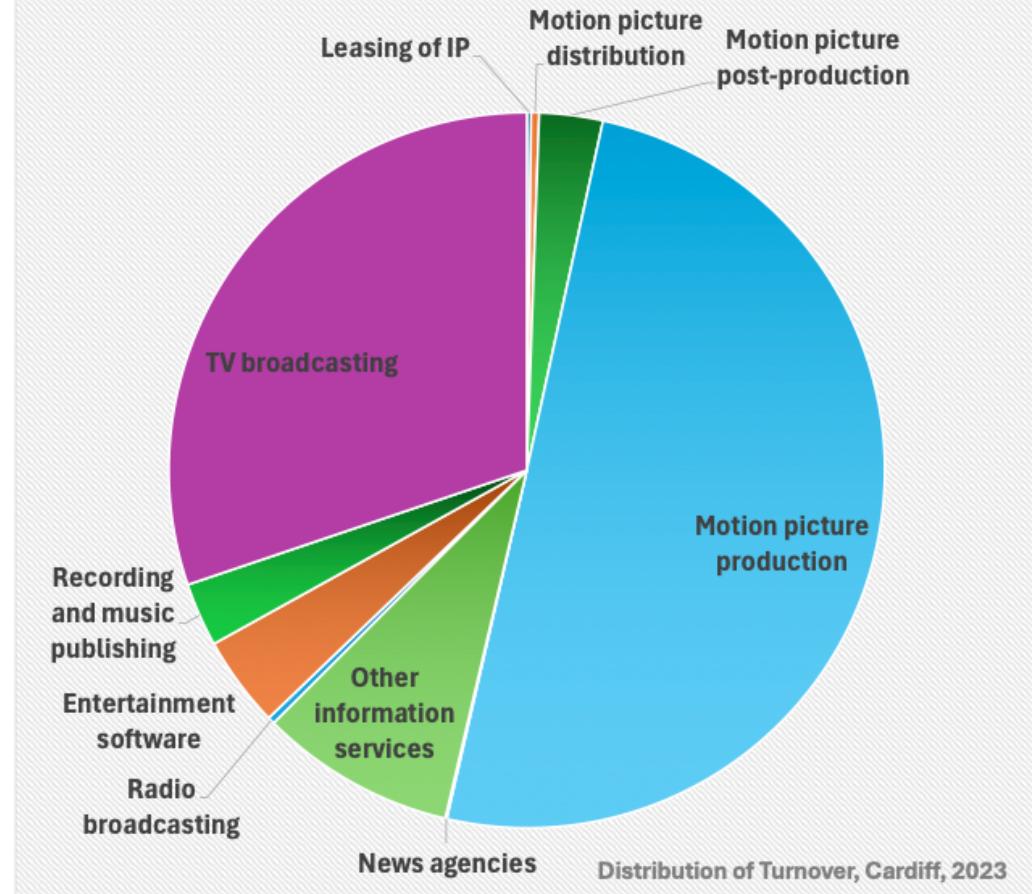
- The graphs demonstrate the **consistent pattern of growth across key economic metrics in Cardiff** with a noticeable boost after 2017 and most dramatically since 2021 – the respective years of the start of the *Clwstwr* and *Media Cymru* programmes.
- Cardiff's FTE curve climbs more sharply than most comparators, showing job creation has kept pace with turnover and number of businesses, **pointing to a broad growth cluster effect**.
- Turnover and FTEs overall fluctuate in the media sector, due to the project-based nature and dependence of single large anchor companies. COVID-19 also had a measurable impact across a number of cities.



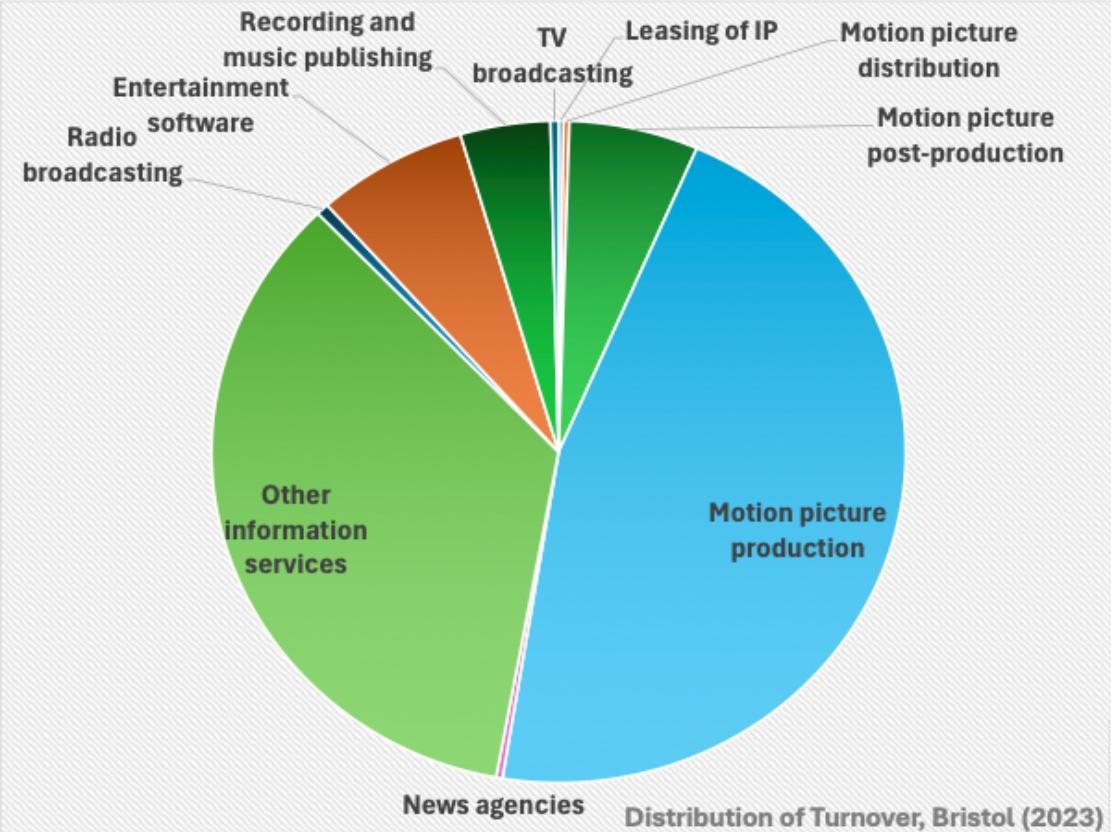
FINDINGS: Sector comparison

A deeper dive into the make-up of the media sectors in Cardiff, Bristol and Manchester shows notable differences in areas of strength.

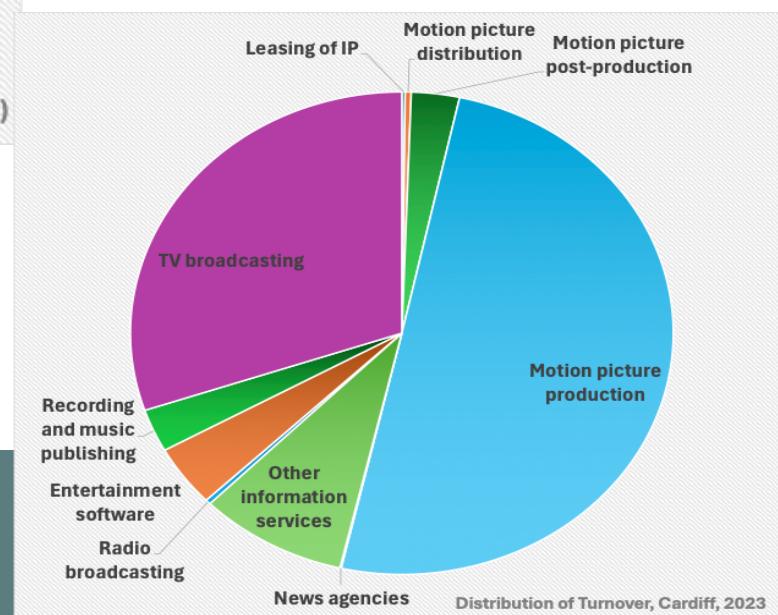
- Cardiff is particularly strong in film and TV production (around half the overall media turnover), and other broadcasting activity.



FINDINGS: Sector comparison



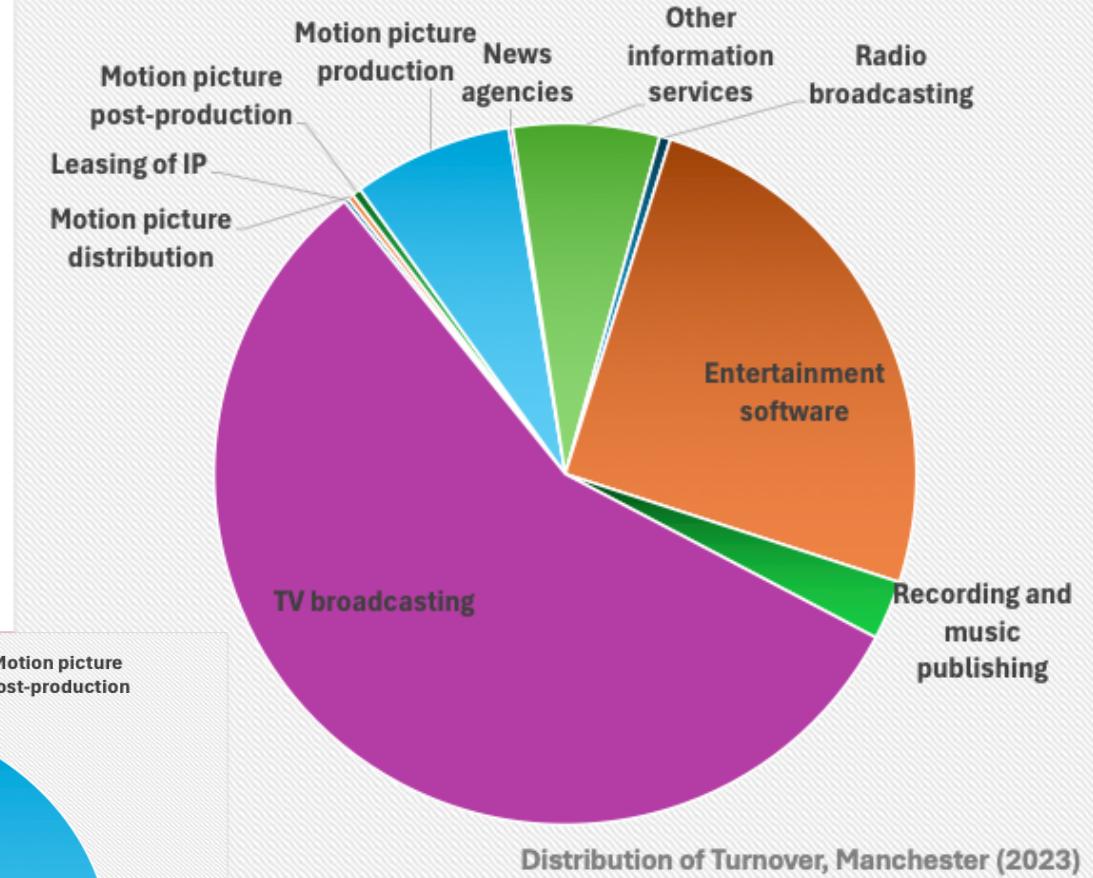
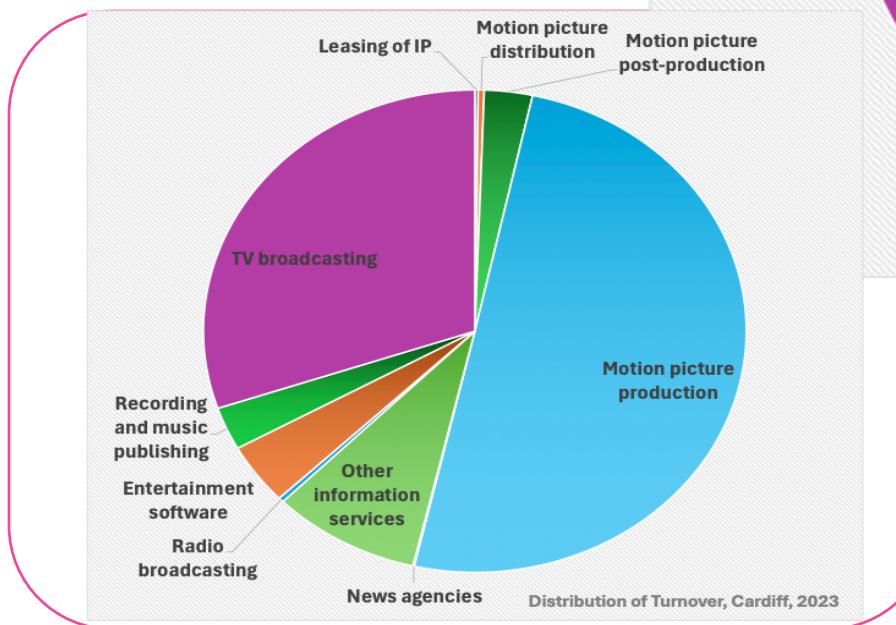
- Bristol has notable strength in "other information services", an activity that while seen as part of media sector also includes companies like Teleperformance, a global digital business services company. This reflects the strength of the related technology sector (CreatTech) in the city region.



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FINDINGS: Sector comparison

- Manchester's strength in broadcasting activity reflects the significant BBC presence in neighbouring Salford (which was included into the media cluster).



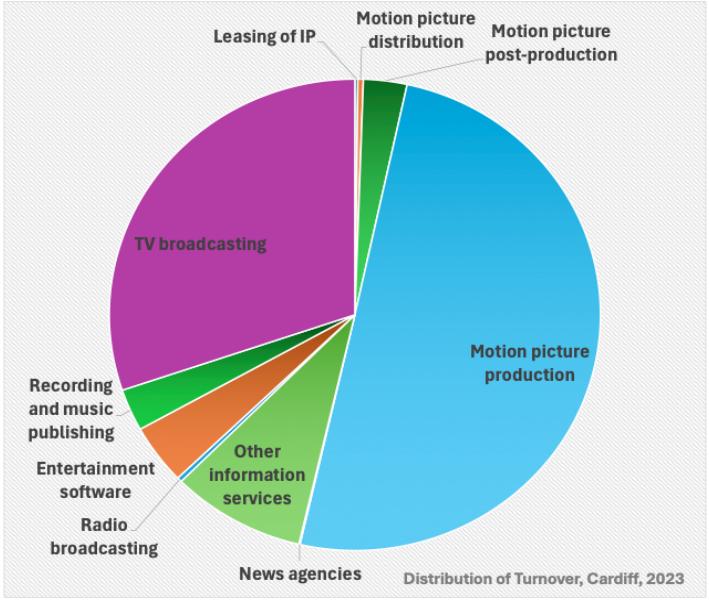
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The media sector make-up in other city regions tell a range of stories:

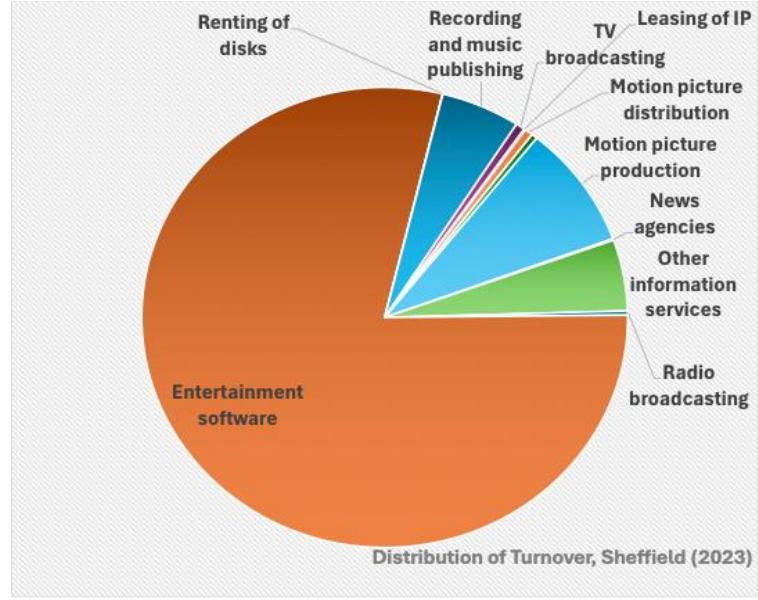
- Activity in **Sheffield and Nottingham** is dominated by interactive leisure software (such as gaming), with one or two dominant companies. This is also a strength in **Liverpool**.
- **Edinburgh and Glasgow** show very complimentary strengths, with the BBC a major presence in Glasgow, while Edinburgh is dominated by film/TV production.
- **Leeds** has a similar profile to Bristol, its major sub-sectors being other software activity and film/TV production
- **Swansea** is dominated by broadcasting, reflecting the presence of S4C, which is based in nearby Carmarthen.

FINDINGS: Sector comparison

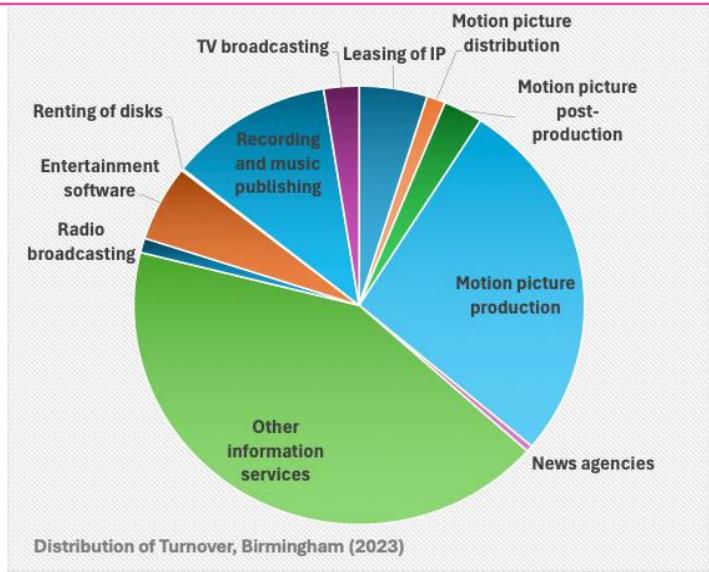
Cardiff



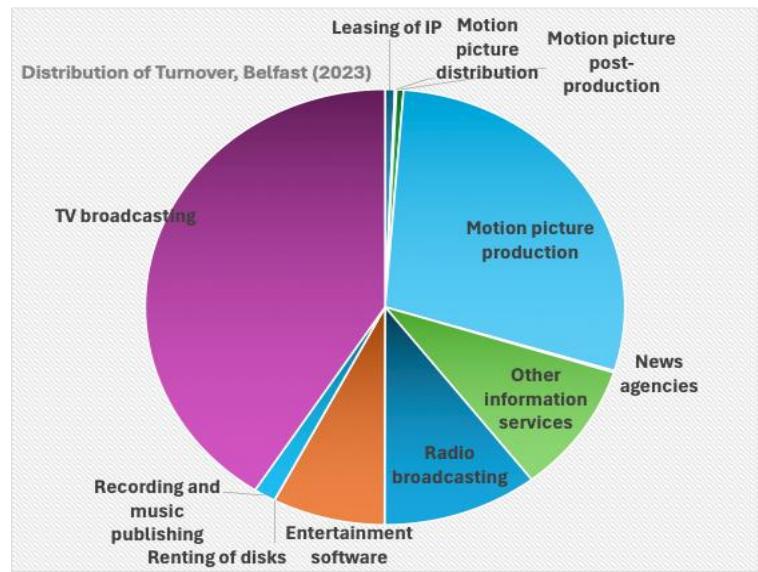
Sheffield



Birmingham

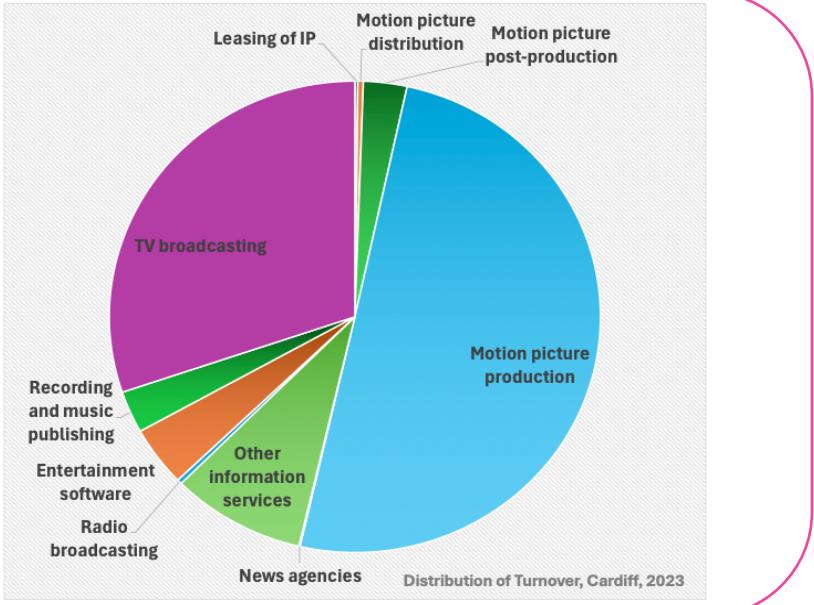


Belfast

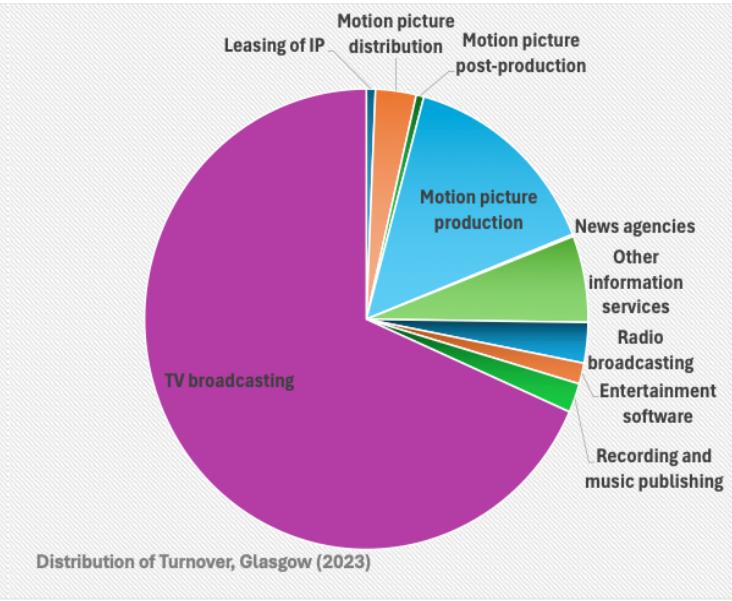


FINDINGS: Sector comparison

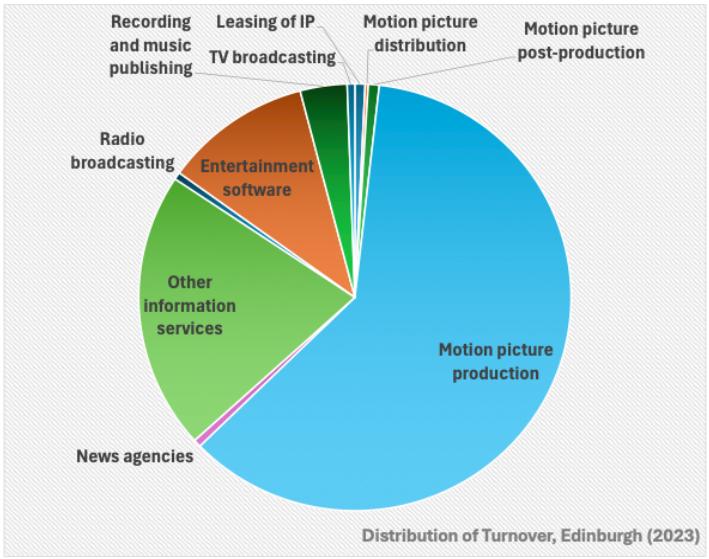
Cardiff



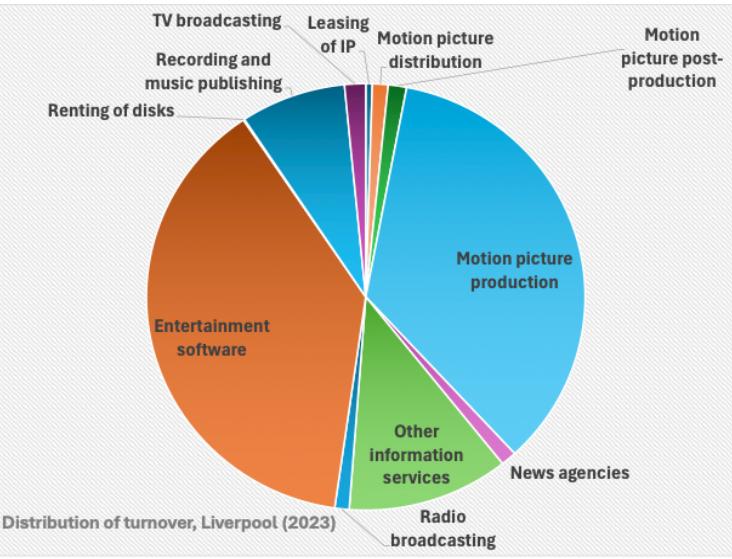
Glasgow



Edinburgh



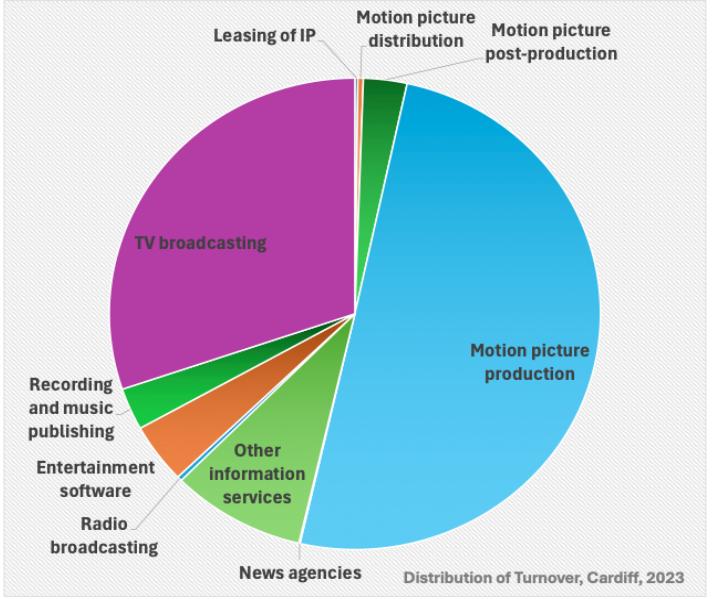
Liverpool



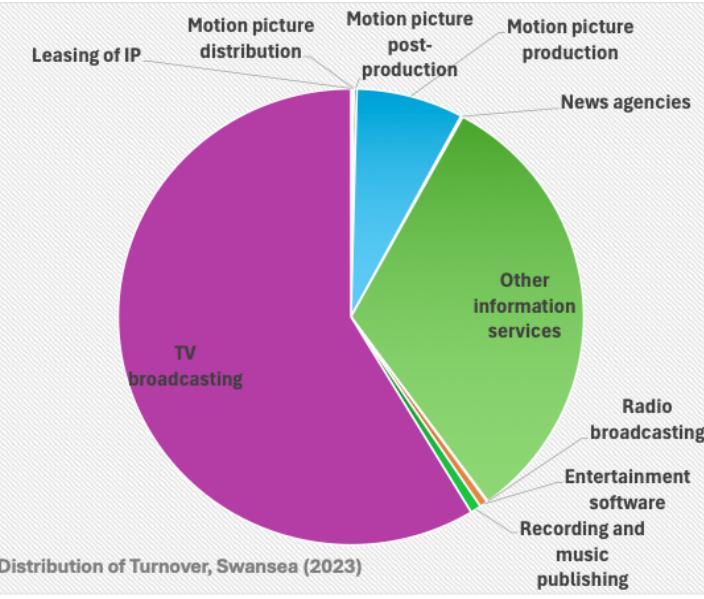
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FINDINGS: Sector comparison

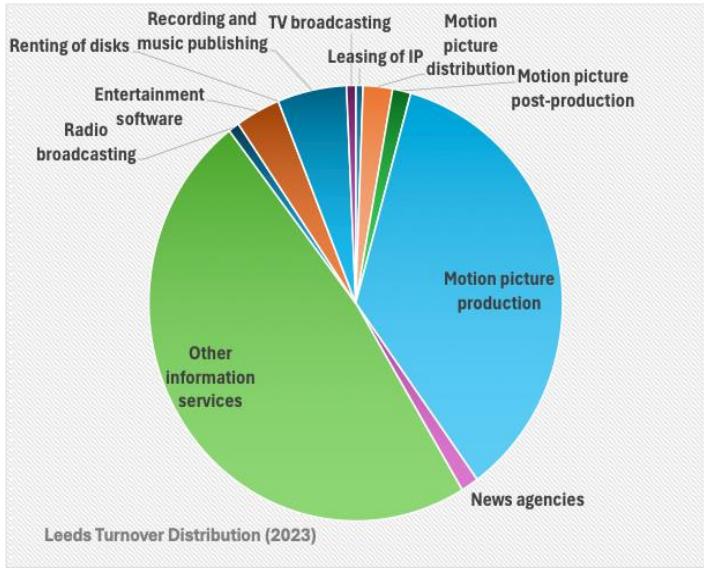
Cardiff



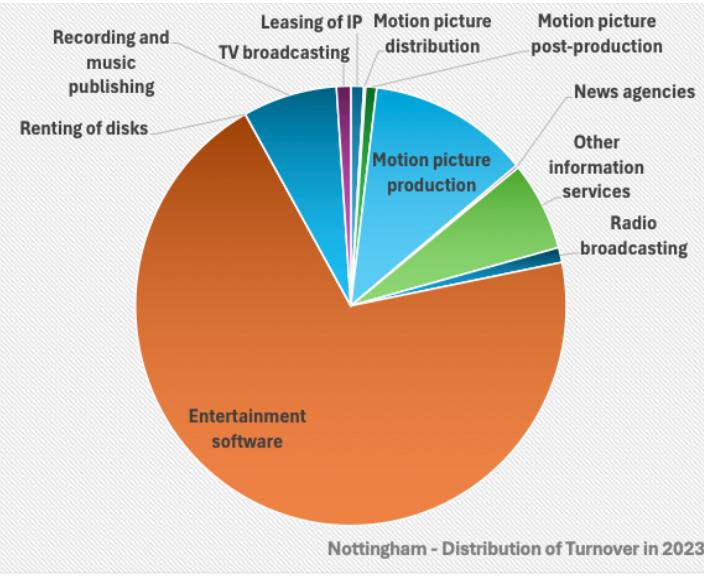
Swansea



Leeds



Nottingham



Our cross-city analysis shows that Cardiff's media cluster has moved into the top cohort of UK cities across all metrics. **Cardiff has the strongest growth in number of businesses and R&D spent across the whole of the UK.** Its consistent growth patterns across economic indicators highlights a larger cluster effect and **the potential for Cardiff to become the leading media cluster in all economic indicators outside of London in the future.**

The data further points to the **potential effect of our place-based innovation programmes, *Clwstwr* and *Media Cymru***, showing that programmatic R&D funding translated into measurable ecosystem thickening - more businesses, sustained job creation, turnover and higher innovation intensity.

At the **Centre for the Creative Economy**, we are extending this work through Media Cymru's activities including the innovation pipeline (<https://media.cymru/>) and by our ongoing efforts to measure the sector and impact of our funding.

You can find more indicators and data via the **Creative Economy Atlas Cymru** (<https://creativeatlas.cymru/>) to track firms, sub-sectors and spatial patterns across Wales.