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Creative Wales Industry Survey 2022 Report

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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1. Headline Findings

Overview of the survey respondents

- 1.1 The survey was completed by 344 respondents, with half (51%) from publishing, a fifth (19%) from screen, 16% from music, and 14% from the digital industry. A third (36%) are self-employed or freelancers and 17% are fluent Welsh speakers.

Covid-19 remains a firm impact on business turnover

- 1.2 In the last financial year, 72% overall saw an increase or no change in turnover (35% increase in turnover and 37% no change/ stayed the same). But one in three (28%) respondents saw a decrease implying that there could be a desire for recovery in Wales' creative industry for some. 14% of these claimed a decrease of more than 60%.
- 1.3 The most frequently mentioned reason given for those who have seen a decrease is the impact of Covid-19 (83%), while a quarter (24%) point to a drop in business or work available highlighting that these factors could be linked.

Some see light at the end of the pandemic tunnel

- 1.4 While the pandemic has negatively impacted many businesses, 35% report an increase in their turnover compared to their last financial year, with 59% of those seeing an increase because Covid-19 has positively impacted them and 47% saying they have seen more business and an increase in work available.
- 1.5 A higher proportion (48%) say they are confident about running their business profitably for their next financial year, compared to those who are not (19%).

Public funding has given hope to some

- 1.6 Around half (48%) say they have had public funding in their last financial year, including support from Welsh Government, local authorities, Arts Council of Wales, business rates grants, and support through the furlough scheme. In addition, 10% of respondents say they requested funding from Creative Wales.

Skills gaps or professional development needs remain an issue for some

- 1.7 More than a quarter (27%) of businesses say they have had difficulties recruiting in the last year. Of those who have experienced difficulties, 42% cite skills gaps in the workforce or among applicants. Technology (42%) and sector-specific skills (43%) are the most frequently mentioned gaps. In addition, 30% say they have skills gaps or professional development needs in the creative sector's workforce.

Creative Wales plays a key role in businesses future – growth will be vital

- 1.8 However, only 4% of all respondents would like to see Creative Wales provide publicly funded FE and HE courses. Rather, over half (55%) of respondents would like to receive further financial support from Creative Wales, a third (36%) would be interested in networking opportunities and a quarter (25%) want business support and advice in terms of their priorities.
- 1.9 Looking to their next financial year, growth will be important. Over half (54%) will be working to increase profitability, a quarter (26%) will be improving marketing opportunities and brand awareness and 21% will seek to grow the workforce.

2. Background and Methodology

What is the Creative Wales Industry Survey?

- 2.1 Creative Wales (CW) wished to understand trends and needs among the creative industries in Wales and to disseminate the findings in a useful way to the wider industry. CW requires the survey to run annually and include ad-hoc questions around current issues and trends in the industry at the point of data collection for every survey, in conjunction with a set of the same core questions.
- 2.2 This first wave of the research was needed to collect baseline data and common insights across the creative industry sectors. This in turn will inform how CW can best support organisations and individuals in the future.

How was the Survey conducted?

- 2.3 CW commissioned Strategic Research and Insight (SRI), an independent agency based in Cardiff, to conduct this research. We have conducted the work using two approaches to boost response rates and raise awareness of the survey with key stakeholders – telephone and online surveys.
- 2.4 The telephone survey was undertaken with creative industries in Wales with a bought-in database from an approved data broker. The online survey ran alongside the telephone survey and was distributed to various key stakeholders of CW, where they promoted and shared an online link to the survey.

Sampling approach

- 2.5 The sample covered the four regions in Wales – North, Mid, South West and South East. SRI conducted 344 interviews by telephone and online with individuals and organisations in the creative industries in March 2022. The online survey was promoted by CW to supplement the final response rate.
- 2.6 This consisted of businesses and freelancers that represent the main sectors supported by CW including screen, music, digital and publishing, which ultimately make up the creative industries in Wales, as defined by CW. Due to the high levels of responses from the publishing sector results will be skewed.

CW Sector	Online	Telephone	No. of completed responses
Music	11	45	56
Screen	26	39	65
Digital	5	42	47
Publishing	-	174	174
Other ¹	2	-	2
Total	44	300	344

Survey development and format

2.7 Creative Wales supplied us with a range of topics covering areas such as:

- Business makeup, diversity and fair work
- Business performance and sustainability
- Projected business confidence
- Skills shortages
- Business support and engagement
- Welsh language capabilities
- Covid-19 impacts

2.8 The final questionnaire consisted of 29 questions – mostly closed, but three were completely open, allowing respondents the opportunity to provide deeper insights into the industry.

What does this report cover?

2.9 It is in the interests of Creative Wales to understand the sector's current position during, what we would hope to be, the tail end of the pandemic; then, to gather information that will support recovery planning for the industry in Wales. This report covers the following:

- Summary of the main findings
- Business profile
- Business turnover
- Skills and recruitment
- Business support
- Welsh language capabilities

¹ Other refers to the online survey responses who stated 'Artist' and 'Teaching Photography' as their business activity

- 2.10 As well as this report, we have also provided the following supporting information:
- Cross-tabulations for quantified feedback are provided separately by region, sector, and type of business
 - Anonymised raw data in Excel format
- 2.11 We have also gathered open comments made during interviews to support the quantitative findings.

I'm looking at a percentage – where does this come from?

- 2.12 All numbers and percentages cited in this report are from the combined surveys. The first eight questions were used for filtering and to understand the business makeup; this report discusses the findings of the main questions from Q9 to Q29.
- 2.13 It is also important to take care when considering the results for sub-groups where the sample size is small. Not all questions received a full response rate, so some base sizes are smaller than the total sample.
- 2.14 Where a very small base is involved, we refer to the *number* of respondents rather than the *percentage* of respondents. This is due to the low base as percentages could be misleading.

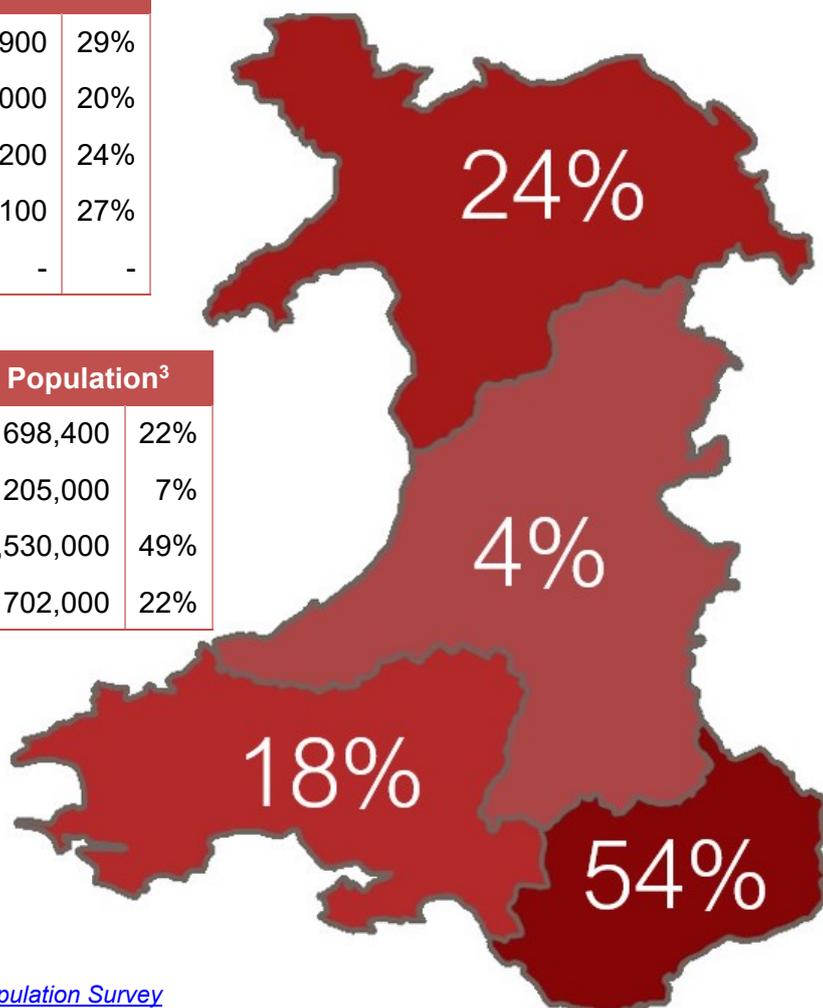
3. Business Profile

Sample distribution

- 3.1 The research began with an initial screening question (in both telephone and online surveys) to ensure we included eligible respondents who work in the CW sectors illustrated by CW.
- 3.2 Because there was no comparative data about the population of those who work in CW sectors when the research began, no quotas or restrictions were set, except that all persons aged 18 and over were able to take part. The research achieved a good spread of respondents geographically, broadly representative of the regional distribution of the population of Wales. Here we illustrate the spread of the completed interviews by region in Wales.
- 3.3 After the research concluded, some comparative data around the number of persons employed in each of the sectors became available. Comparisons between the achieved responses and numbers employed in each sector are also illustrated, showing an overrepresentation of the publishing sector responses and an underrepresentation of music and digital sectors.

Sector	Response		Population ²	
Music	56	16%	9,900	29%
Screen	65	19%	7,000	20%
Digital	47	14%	8,200	24%
Publishing	174	51%	9,100	27%
Other	2	<1%	-	-

Region	Response		Population ³	
North Wales	82	24%	698,400	22%
Mid Wales	15	4%	205,000	7%
South East Wales	186	54%	1,530,000	49%
South West Wales	61	18%	702,000	22%



² Source: Welsh Government analysis of the [Annual Population Survey](#)

³ Source: Mid-year population estimates, Office for National Statistics, 2018

3.4 The following tables illustrate the spread of the completed interviews by various business attributes.

Profiles by region

Current status	Total	Region			
		North	Mid	South East	South West
I am self-employed	98 28%	32 39%	5 33%	38 20%	23 38%
I am a freelancer	26 8%	5 6%	1 7%	17 9%	3 5%
Currently an employee of the company	71 21%	10 12%	- -	52 28%	9 15%
An employer/ director/ owner	149 43%	35 43%	9 60%	79 42%	26 43%

Business started/ start trading	Total	Region			
		North	Mid	South East	South West
In the last 2 years	5 1%	3 4%	- -	2 1%	- -
2-5 years ago	18 5%	3 4%	1 7%	10 5%	4 7%
6-10 years ago	40 12%	8 10%	1 7%	27 15%	4 7%
More than 10 years ago	281 82%	68 83%	13 87%	147 79%	53 87%

Legal status of the business	Total	Region			
		North	Mid	South East	South West
Sole proprietorship/ trader	115 33%	35 43%	5 33%	48 26%	27 44%
Private limited company, limited by shares (LTD)	152 44%	34 41%	5 33%	95 51%	18 30%
Private company limited by guarantee	16 5%	4 5%	- -	9 5%	3 5%
Partnership	32 9%	5 6%	3 20%	15 8%	9 15%
Limited liability partnership	1 0%	- -	- -	1 1%	- -
Charitable Incorporated Organisation	14 4%	1 1%	- -	10 5%	3 5%
Other	14 4%	3 4%	2 13%	8 4%	1 2%

Ethnicity (of the owners, partners or directors)	Total		Region		
		North	Mid	South East	South West
White	322	81	13	170	58
	94%	99%	87%	91%	95%
Mixed/ Multiple ethnic groups	5	-	1	4	-
	1%	-	7%	2%	-
Asian / Asian British	2	-	-	2	-
	1%	-	-	1%	-
Black / Black British	1	-	-	1	-
	0%	-	-	1%	-
Other	1	-	-	1	-
	0%	-	-	1%	-
Don't know	8	-	1	5	2
	2%	-	7%	3%	3%
Refused	5	1	-	3	1
	1%	1%	-	2%	2%

Profiles by sector

Current status	Total		Sector			
		Music	Screen	Digital	Publishing	Other
I am self-employed	98	15	9	12	62	-
	28%	27%	14%	26%	36%	-
I am a freelancer	26	10	3	4	8	1
	8%	18%	5%	9%	5%	50%
Currently an employee of the company	71	11	17	10	33	-
	21%	20%	26%	21%	19%	-
An employer/ director/ owner	149	20	36	21	71	1
	43%	36%	55%	45%	41%	50%

Business started/ start trading	Total		Sector			
		Music	Screen	Digital	Publishing	Other
In the last 2 years	5	1	1	2	1	-
	1%	2%	2%	4%	1%	-
2-5 years ago	18	4	8	3	2	1
	5%	7%	12%	6%	1%	50%
6-10 years ago	40	7	12	5	16	-
	12%	13%	18%	11%	9%	-
More than 10 years ago	281	44	44	37	155	1
	82%	79%	68%	79%	89%	50%

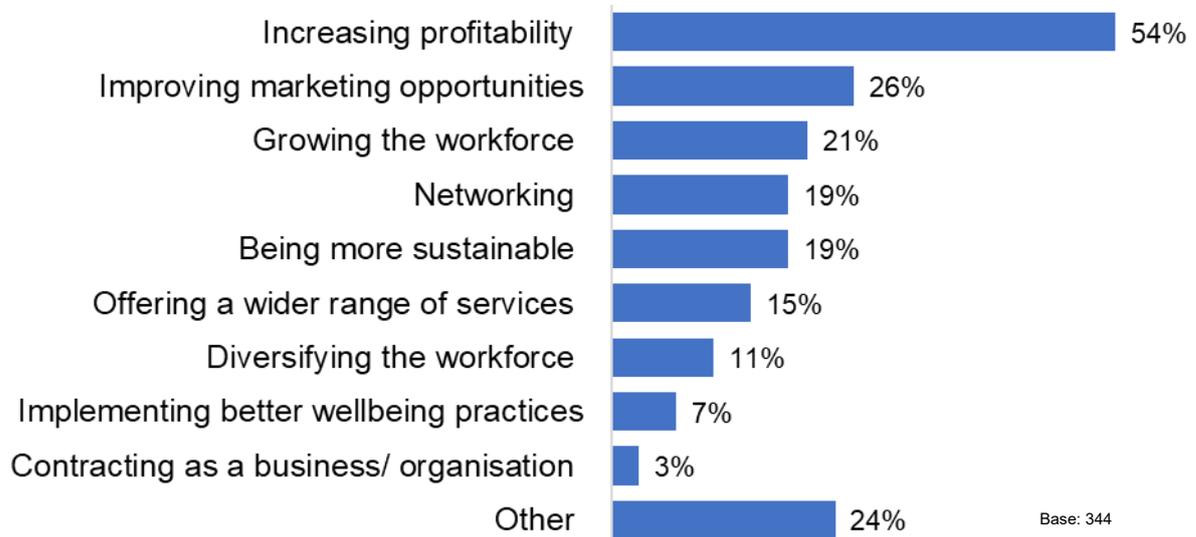
Legal status of the business	Total		Sector			
		Music	Screen	Digital	Publishing	Other
Sole proprietorship/ trader	115 33%	25 45%	9 14%	10 21%	70 40%	1 50%
Private limited company, limited by shares (LTD)	152 44%	10 18%	43 66%	28 60%	70 40%	1 50%
Private company limited by guarantee	16 5%	1 2%	6 9%	- -	9 5%	- -
Partnership	32 9%	6 11%	1 2%	9 19%	16 9%	- -
Limited liability partnership	1 0%	- -	1 2%	- -	- -	- -
Charitable Incorporated Organisation	14 4%	9 16%	1 2%	- -	4 2%	- -
Other	14 4%	5 9%	4 6%	- -	5 3%	- -

Ethnicity (of the owners, partners or directors)	Total		Sector			
		Music	Screen	Digital	Publishing	Other
White	322 94%	52 93%	61 94%	47 100%	160 92%	2 100%
Mixed/ Multiple ethnic groups	5 1%	1 2%	2 3%	- -	2 1%	- -
Asian / Asian British	2 1%	- -	1 2%	- -	1 1%	- -
Black / Black British	1 0%	- -	- -	- -	1 1%	- -
Other	1 0%	- -	- -	- -	1 1%	- -
Don't know	8 2%	2 4%	- -	- -	6 3%	- -
Refused	5 1%	1 2%	1 2%	- -	3 2%	- -

4. Business Turnover

What are business aspirations for their next financial year?

Q9. "We'd like to know about your business aspirations. In 'your' next financial year are you likely to be... Select your top three answers only"



The top 3 business aspirations by region are:

North (82)	Mid (15)	South East (186)	South West (61)
<i>Increasing profitability (55%)</i>	<i>Increasing profitability (6*)</i>	<i>Increasing profitability (52%)</i>	<i>Increasing profitability (66%)</i>
<i>Improving marketing opportunities (29%)</i>	<i>Being more sustainable (5*)</i>	<i>Improving marketing opportunities (25%)</i>	<i>Being more sustainable (28%)</i>
<i>Being more sustainable (18%)</i>	<i>Offering a wider range of services (4*)</i>	<i>Growing the workforce (25%)</i>	<i>Improving marketing opportunities (25%)</i>

* Answers for Mid Wales are shown as numbers rather than percentages due to a low base

The top 3 business aspirations by sector* are:

Music (56)	Screen (65)	Digital (47)	Publishing (174)
<i>Increasing profitability (55%)</i>	<i>Increasing profitability (54%)</i>	<i>Increasing profitability (53%)</i>	<i>Increasing profitability (55%)</i>
<i>Improving marketing opportunities (30%)</i>	<i>Improving marketing opportunities (32%)</i>	<i>Improving marketing opportunities (30%)</i>	<i>Networking (20%)</i>
<i>Growing the workforce (20%)</i>	<i>Growing the workforce (28%)</i>	<i>Growing the workforce (23%)</i>	<i>Improving marketing opportunities (20%)</i>

* Responses are of the main sectors supported by CW, as defined by CW

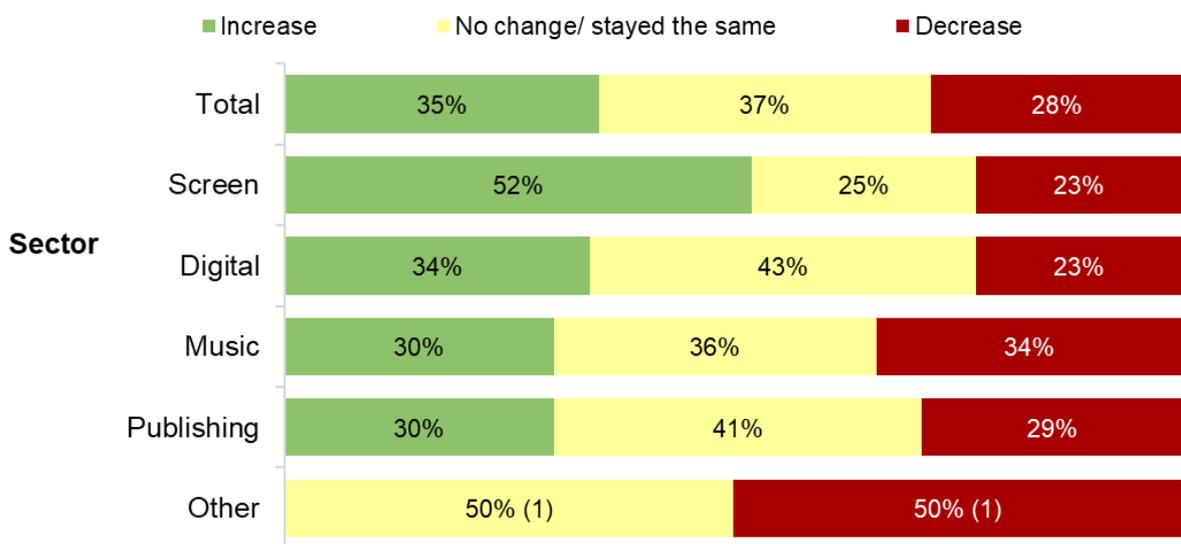
The top 3 business aspirations by Business Type are:			
Self-employed (98)	Freelancer (26)	Employee (71)	Employer (149)
Increasing profitability (47%)	Increasing profitability (9*)	Increasing profitability (51%)	Increasing profitability (64%)
Improving marketing opportunities (20%)	Networking (6*)	Improving marketing opportunities (37%)	Growing the workforce (26%)
Networking (20%)	Offering a wider range of services (3*)	Growing the workforce (31%)	Improving marketing opportunities (26%)

* Answers for freelancers are shown as numbers rather than percentages due to low base

Understandably creative industries want to drive their profits up

4.1 *Increasing profitability* in their next financial year is a top answer across the regions in Wales as well as the sectors and business types, especially as Covid-19 has impacted the industry. But when it comes to second place, *improving marketing opportunities* and *brand awareness* is high on their list for next year, for some, in the north and south east Wales; being more sustainable is high on others' lists for their business in mid and south west Wales. There is a skew to the publishing sector due to the high levels of responses from this sector.

Q10. "Compared to 'your' last financial year, have you seen an increase or decrease in turnover, if at all?"



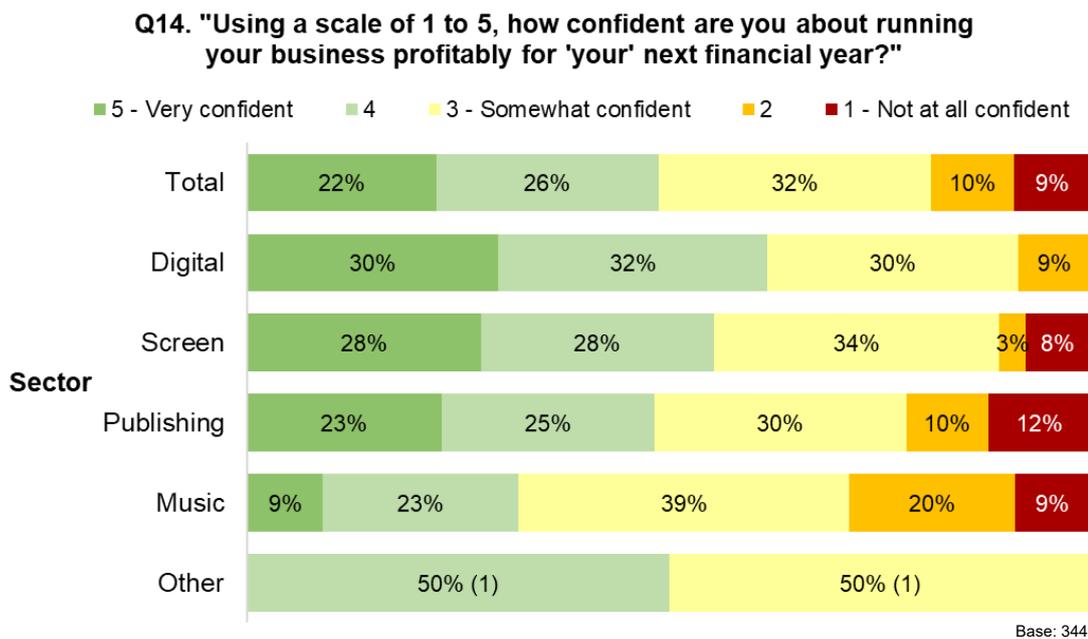
Q10 'Other' sector illustrates the number of responses in brackets due to the low base

Covid-19 remains a firm influence on the lack of business turnover

4.2 28% have seen a decrease in turnover in their last financial year, with a fifth (19%) of these claiming a decrease of more than 60%. Whilst 35% have seen an increase in their turnover, 25% of these respondents have mostly seen a small increase of around 1-10% compared to their last financial year.

- 4.3 Whether there has been an increase or decrease in turnover, the most frequently mentioned reason given is due to the impact of Covid-19. Those who have been lucky enough to see an increase in turnover say that they have had an increase in business or work available (47%).
- 4.4 Among those who have seen their turnover drop, this has largely been attributed to Covid-19 (83%), with a quarter (24%) pointing to a drop in business or work available. These factors are likely to be linked.

Is the sector confident about running their business profitably in their next financial year?



Q14 'Other' sector illustrates the number of responses in brackets due to the low base

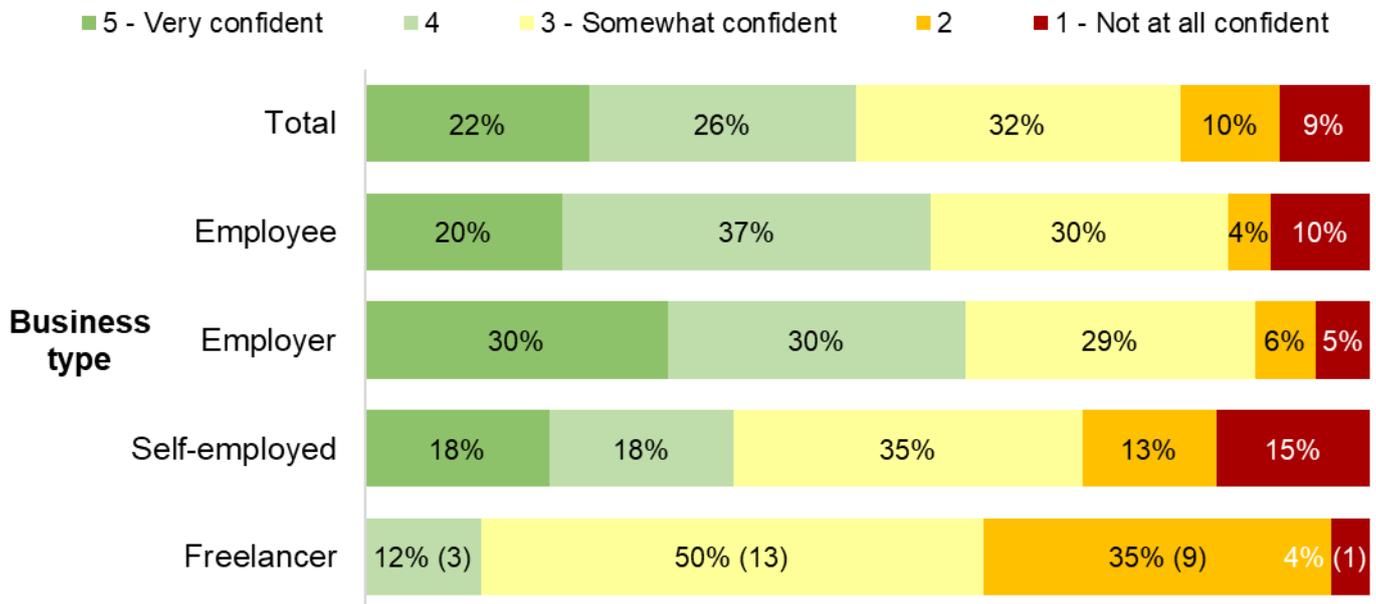
Confidence seems good for the moment

- 4.5 Pre-pandemic, the creative industries were thriving, claiming this sector is the fastest-growing part of the Welsh economy for several years⁴. It is clear to see there is still some optimism, with half (48%) claiming they are confident their business will be profitable in their next financial year. Confidence was lowest in the music sector (29%) and highest in the screen sector (56%), but with no substantial variation by region.

⁴ Source: [Business Wales, written statement from Deputy Minister for Culture, Sport and Tourism](#)

Differences by business type

Q14. "Using a scale of 1 to 5, how confident are you about running your business profitably for 'your' next financial year?"



Base: 344

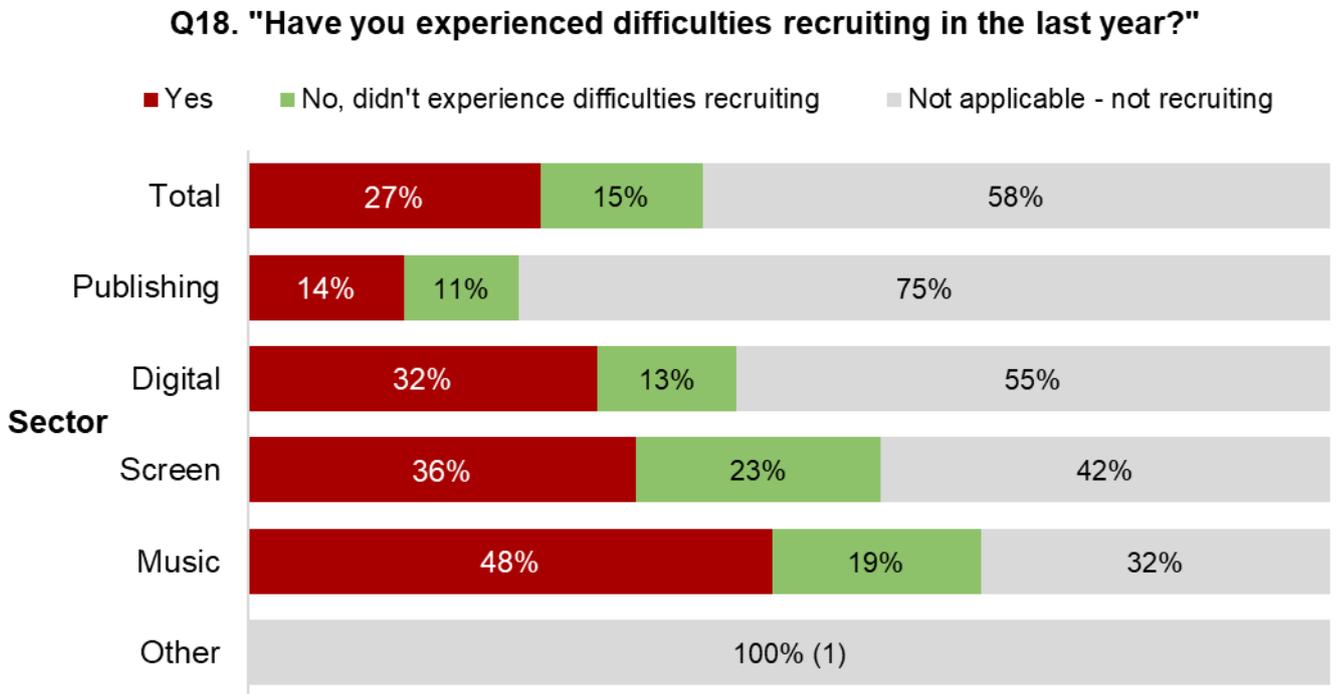
Q14 Freelancers are illustrated with the number of responses in brackets due to the low base

Employer confidence is higher than other business types to date

- 4.6 Employers are reporting in being the most confident (60% combined) in the forthcoming financial year whereas freelancers, albeit a small sample size, are seen as being the least confident (38% combined – 10 freelancers claiming this from 26 overall).
- 4.7 Public funding has given hope to some, with around half (48%) reporting they have received public funding in their last financial year. This included Welsh Government, local authorities, Arts Council of Wales, business rates grants, and support through the furlough scheme. 10% say they have requested funding from Creative Wales, with the screen sector being particularly likely to have requested this funding (32%). However, a lack of distinction between Welsh Government funding and Creative Wales funding may mean this proportion is underreported.

5. Skills and Recruitment

What recruitment difficulties have businesses been faced with?



Base: 220

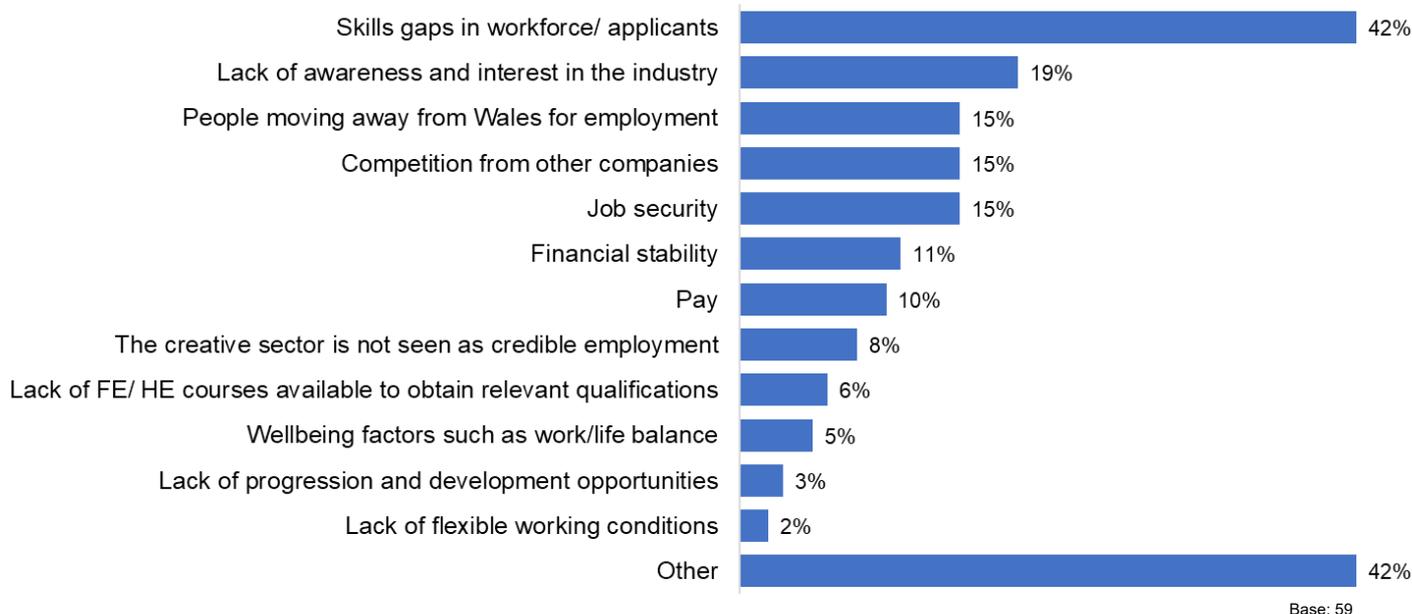
Q18 has been asked to employers and employees; 'Other' sector illustrates the number of responses in brackets due to the low base

Many businesses are not recruiting

5.1 Less than a fifth of businesses are recruiting without difficulties (15%), with 58% not recruiting, and more than a quarter (27%) having faced recruitment issues. Reasons for difficulties in recruiting are shown in a chart overleaf, but the top three roles businesses have generally found hard to fill fall under the following sectors. Due to the small sample sizes these are illustrated as numbers instead of percentages.

The top 3 most desired roles by sector are:			
Music (6)	Screen (16)	Digital (2)	Publishing (6)
Sound Engineer	Editor	Content Designer/ Scriptwriter	Administrator/ Office Manager
Bar Staff	Production Co-Ordinator	Front End Programmer	Production Manager
Lighting Engineers	1AD	Designer/ Artist	Designer

Q20. "Why do you think this is?"



Q20 has been asked to those experiencing recruitment difficulties

Skills gaps are a key issue for recruitment

- 5.2 Of those who have experienced difficulties recruiting, 42% attribute this to skills gaps in the workforce or among applicants. Around a fifth (19%) believe this was due to a lack of awareness and interest in the industry.
- 5.3 ‘Other’ difficulties in recruiting were most frequently that many experienced workers have moved out of their sectors or retired due to the pandemic. Others state that expectations around working hours have changed following the pandemic, with applicants no longer being prepared to work evenings/full-time.

“Lack of training in recent years. People have retired and there’s no one to take their places. There’s lots going on in Wales and not enough people”
Screen, north Wales

“No staff working evenings anymore”
Music, south east Wales

“People wanting to stay working from home so leave if they can’t and go somewhere else”
Publishing, south east Wales

“People getting used to not working”
Publishing, south east Wales

“I find the older ones don’t want to work full time anymore”
Music, south east Wales

“People staying in safer full-time jobs”
Screen, north Wales

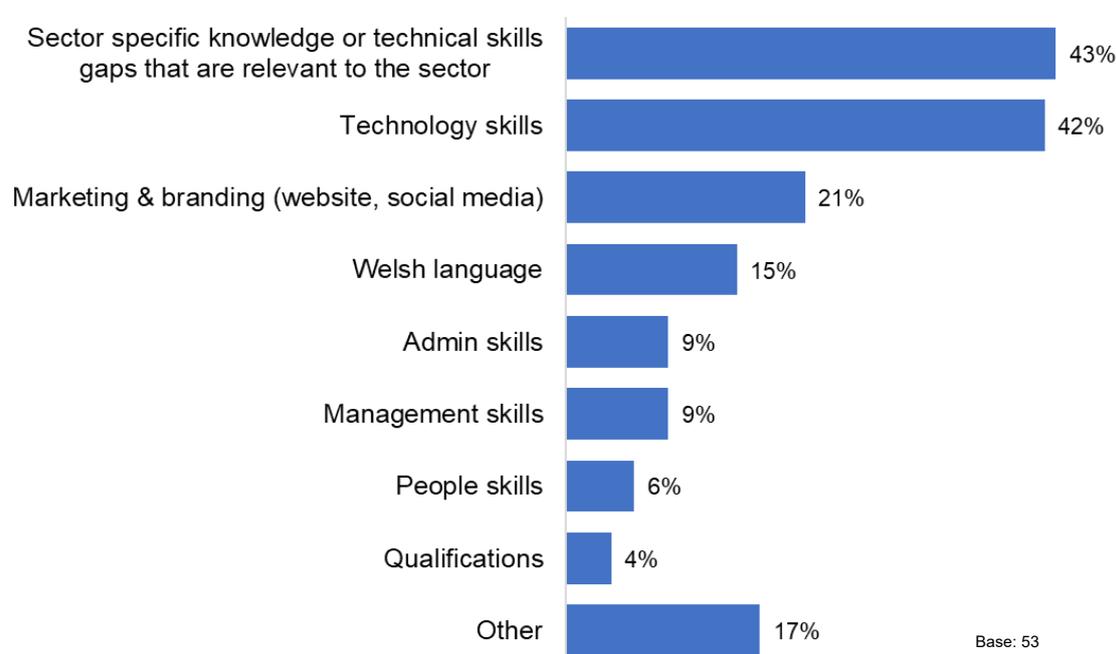
“We need more developers and data scientists and more cross-platform content skills. Within the companies that make content for us, there is a skills shortage across almost all specialties!”
Screen, south west Wales

“Experienced programmers”
Digital, north Wales

“We work in Llanelli, so experienced people tend to live in the Cardiff area. Hours of work are usually between 10:30 and 19:30 due to the nature of the broadcast.”
Screen, south west Wales

What skills gaps are businesses been faced with?

Q22. "What are they?"



Q22 has been asked to those having a skills gap in the workforce

Sector-specific skills and professional development needs remain an issue for some

5.4 Technology (42%) and sector-specific skills (43%) are the most frequently mentioned skills gaps or needs for the sector. This links with the types of roles businesses have been unable to fill or found difficulty in filling. ‘Other’ skills gaps are highly specific to each respondent’s needs and include both job roles (print finishers, full-time editors, and designers) and specific skills (computer musical grading, carpentry skills, and vehicle signwriting).

5.5 In addition, 30% say there are skills gaps or professional development needs in the creative sector. Those that do have gaps in their workforce are mainly an employer, directors or

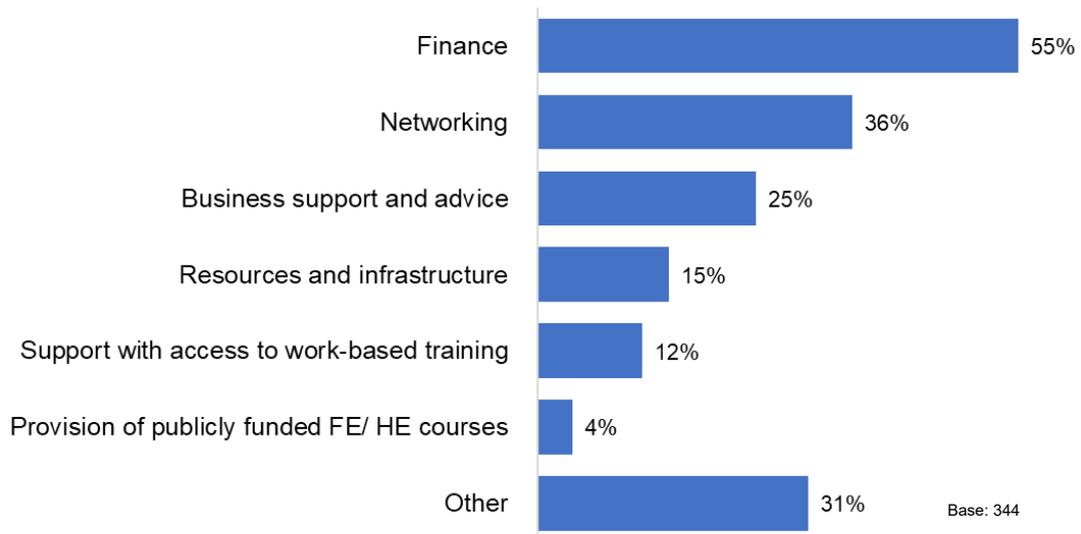
owners, with a third (33%) of employers, directors, or owners stating they have skills gaps. Only three freelancers claim they have specific professional development needs.

- 5.6 The most frequently mentioned recruitment source for those who were recruiting in the last year tends to be online sources (16%), or word of mouth (17%). Only 8% tend to go through an agency and 3% use a freelance directory.

6. Business Support

How can Creative Wales support the industry?

Q24. "How can Creative Wales support you going forward?"



Creative Wales plays a key role in businesses future – growth will be vital

- 6.1 Over half (55%) of respondents would like to receive financial support from Creative Wales, particularly among music (70%) and screen (65%) sectors. A third (36%) would be interested in networking opportunities to build up their contact list and business, and a quarter (25%) want further business support and advice from Creative Wales. Requests for both networking and business support/ advice was particularly lower (21%) among the publishing sector compared to all other sectors.
- 6.2 'Other' responses had varied ideas, including help with recruitment; funding 'grass roots' or emerging companies or contractors, rather than established organisations; and helping with international promotion of companies, but mainly they claim to not need any support.

A small proportion of freelancers are considering leaving their profession

- 6.3 Although the industry has suffered, in the last two years only 15% of freelancers have ever considered leaving their profession. Their reasoning tended to be due to:

"The impacts of the COVID-19 pandemic on my industry has made me consider retiring or moving away from the business."

Publishing, south west Wales

"It's so hard to be a promoter"

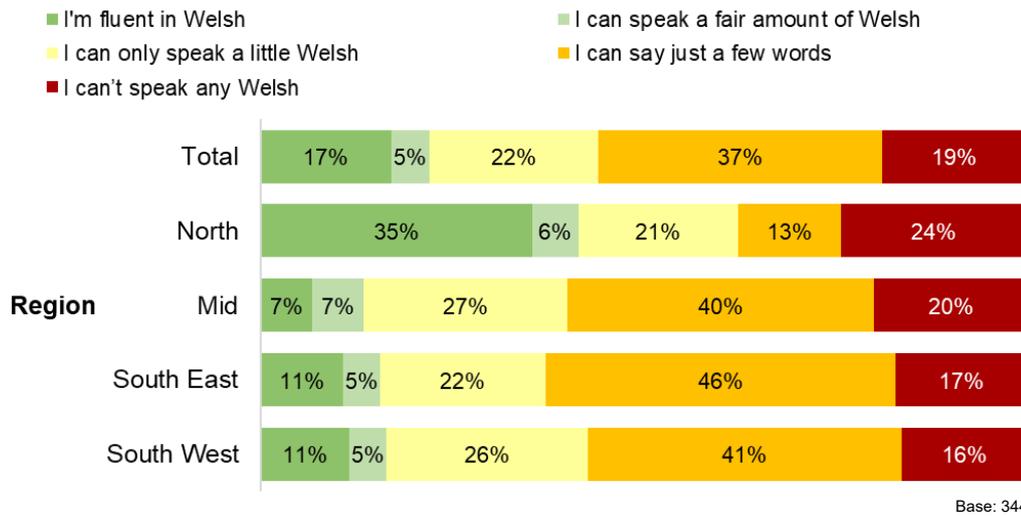
Music, north Wales

"Lack of TV production work and the work getting less well paid"

Screen, south east Wales

7. Welsh Language Capabilities

Q28. "Which of the following best describes your ability to speak Welsh?"

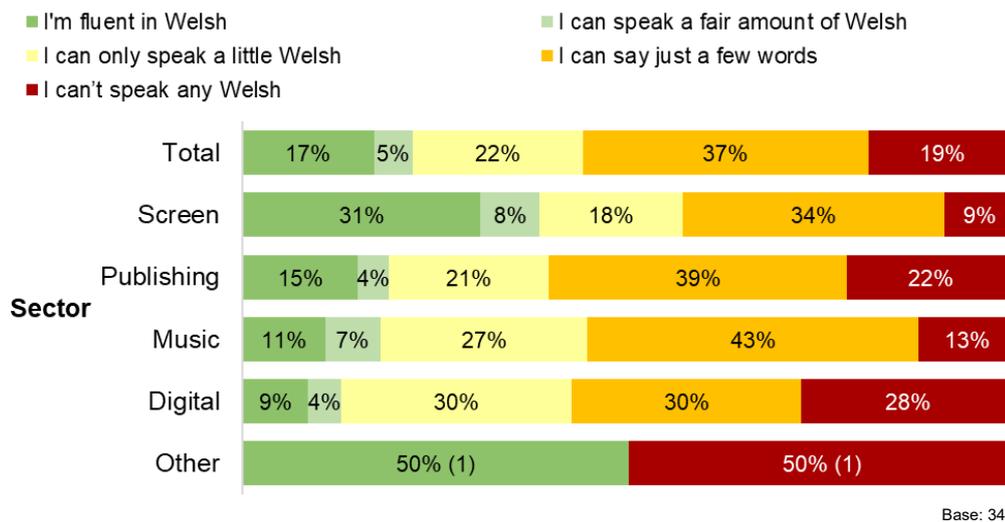


One in five speak Welsh fluently or a fair amount

7.1 While North Wales had a substantially higher proportion of those who could speak Welsh either fluently or a fair amount (41%), there were other regions which were particularly below the average – the overall Wales average being 22%.⁵

Differences by sector

Q28. "Which of the following best describes your ability to speak Welsh?"

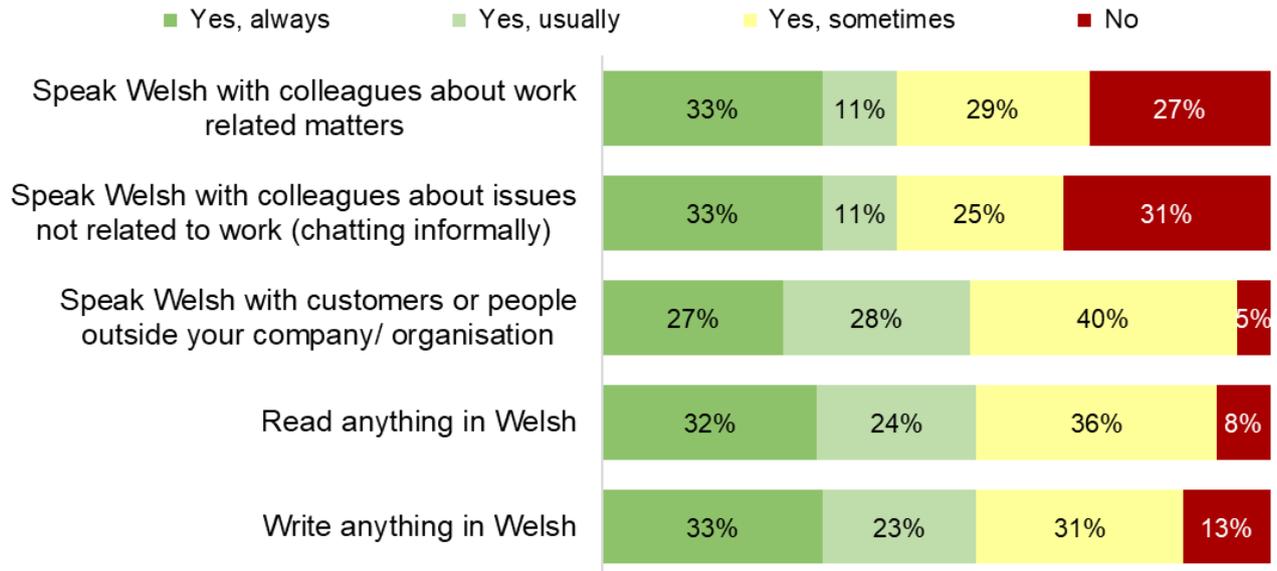


Q28 'Other' sector illustrates the number of responses in brackets due to the low base

⁵ Source: [Welsh Language Use Survey 2019-20](#)

- 7.2 Welsh language ability was highest among the screen sector (39%) and lowest among digital (13%), while other sectors were similar to the overall average – 22%.
- 7.3 The 22% of respondents (combined, when rounded) reporting they are fluent Welsh speakers or speak a fair amount of Welsh were asked a follow up question about how much Welsh they speak at work and were given the following statements to agree or disagree with:

Q29. "Thinking about speaking Welsh at work, do you...?"



Base: 75

Q29 has been asked to those who speak a fair amount or are fluent in Welsh

Wide variety of uses for Welsh language

- 7.4 Amongst Welsh speakers, reading and writing in Welsh at work is common place. Speaking Welsh is also very common with people outside their own company, but less so with colleagues.

8. Implications for Creative Wales

Must play a key role with the sector

- 8.1 Businesses that are aware of Creative Wales would be in favour of further support and advice, especially when it comes to financial assistance and networking opportunities.
- 8.2 Those that have never requested any funding from Creative Wales also felt the need for having Creative Wales on board and assisting in their business growth.

Post Covid-19 and the future

- 8.3 Businesses seem to have some optimism for their next financial year following some very testing times. They are confident their turnover will increase. Some businesses experienced an increase in turnover in their last financial year claiming Covid-19 has positively impacted them, stating they have had an increase in business/ work available.

Skills gaps and recruitment shortages

- 8.4 Whilst only a small number of businesses claim to have encountered a skills shortage or issues with recruitment, the types of roles for some of the sectors appear to be more high-level such as editors in the screen sector, and designers in the digital and publishing sectors. Although there is a skew to the publishing sector due to the high levels of responses from this sector. More networking opportunities here could bring about these high-level skillsets, especially as word of mouth tends to be one of the main sources of recruitment.

Sector outlook

- 8.5 Publishing as a sector differed in their business aspirations compared to all other sectors, with lower priority given to improving marketing opportunities and growing the workforce. Their support needs also differ, with less emphasis on networking and business support and advice.
- 8.6 Confidence in profitability for the next financial year is lowest among the music sector, and highest for screen.
- 8.7 Finance was a key area of support requested by both music and screen sectors, with the screen sector most likely to say they had requested funding from Creative Wales and most likely to have received public funding.

9. Creative Wales Industry Survey Questionnaire

Creative Wales Industry Survey 2022

About the business

Q1 Which one of the following categories best describes the industry sub-sector or sector your business is active in?

- Music
 - Screen (including Animation)
 - Digital (including Games, Immersive, Createch)
 - Publishing
 - Other
 - Other (please specify)**
-

Q2 In which local authority is your business based?

- Blaenau Gwent
- Bridgend
- Caerphilly
- Cardiff
- Carmarthenshire
- Ceredigion
- Conwy
- Denbighshire
- Flintshire
- Gwynedd
- Isle of Anglesey
- Merthyr Tydfil
- Monmouthshire
- Neath Port Talbot

- Newport
- Pembrokeshire
- Powys
- Rhondda Cynon Taf
- Swansea
- Torfaen
- Vale of Glamorgan
- Wrexham
- Outside of Wales

Q3 Which of the following applies to you?

- I am self-employed
- I am a freelancer
- Currently an employee of the company
- An employer/ director/ owner

Q4 When did the business/ you start trading?

- In the last 2 years
- 2-5 years ago
- 6-10 years ago
- More than 10 years ago

Q5 What is the legal status of the business?

- Sole proprietorship/ trader
- Private limited company, limited by shares (LTD)
- Private company limited by guarantee
- Partnership
- Limited liability partnership
- Charitable Incorporated Organisation
- Other

Q6 **We understand the creative industry is a diverse and inclusive sector, so we're interested to find out how diverse the sectors are at leadership level in a bit more detail.**

Could you tell us how many, if any, of your directors and partners are...?
Please enter an approximate number where possible, if not known leave blank

Women: _____
From Black and ethnic minority groups: _____
Have a disability: _____
Welsh speakers: _____

Q7 **Which ethnic groups do the owners, partners or directors belong to? Please tick all that apply**

- White - English / Welsh / Scottish / Northern Irish / British
- White - Irish
- White - Gypsy or Irish Traveller
- White - Roma
- White - Any other White background
- Mixed / multiple ethnic groups - White and Black Caribbean
- Mixed / multiple ethnic groups - White and Black African
- Mixed / multiple ethnic groups - White and Asian
- Mixed / multiple ethnic groups - Any other Mixed / multiple ethnic background
- Asian / Asian British - Indian
- Asian / Asian British - Pakistani
- Asian / Asian British - Bangladeshi
- Asian / Asian British - Chinese
- Asian / Asian British - Any other Asian background
- Black / African / Caribbean / Black British - African
- Black / African / Caribbean / Black British - Caribbean
- Black / African / Caribbean / Black British - Any other Black / African / Caribbean background
- Other ethnic group - Arab

- Any other ethnic group
- Don't know
- Refused

Employment

Q8 **How many:** *Please enter an approximate number where possible if not known leave blank*

Full-time staff do you have in the company? _____

Part-time staff do you have in the company? _____

Freelancers/ contractors did you employ in the last financial year? _____

Apprentices did you employ in the last financial year? _____

Trainees did you employ in the last financial year? _____

Volunteers have worked for the company in the last financial year? _____

Turnover

Q9 **We'd like to know about your business aspirations. In 'your' next financial year are you likely to be...** *Select your top three answers only*

- Increasing profitability
- Growing the workforce
- Diversifying the workforce
- Implementing better wellbeing practices for the workforce/myself
- Offering a wider range of services
- Being more sustainable
- Networking
- Improving marketing opportunities and brand awareness
- Contracting as a business/ organisation

Other

Q10 **Compared to 'your' last financial year, have you seen an increase or decrease in turnover, if at all?**

Increase

Decrease

No change/ stayed the same

Q11 **Compared to 'your' last financial year, by how much has this *{increased / decreased}*?**

Less than 1%

1-10%

11-20%

21-40%

41-60%

61-80%

81-100%

More than 100%

Don't know

Q12 **Why do you think this? Please tick all that apply**

Increased business/ work available

Increased public funding available

Impacts from the Covid-19 pandemic

Increased awareness of the business/ my work

Increased consumers or participation in the sector I work

Other

Q13 **Why do you think this?** *Please tick all that apply*

- Decreased business/ work available
- Decreased public funding available
- Impacts from the Covid-19 pandemic
- Decreased awareness of the business/ my work
- Decreased consumers or participation in the sector I work
- Other

Q14 **Using a scale of 1 to 5, where 1 is not at all confident and 5 is very confident, how confident are you about running your business profitably for 'your' next financial year?**

- 1 - Not at all confident
- 2
- 3 - Somewhat confident
- 4
- 5 - Very confident

Q15 **Have you received any public funding in 'your' last financial year?**

- Yes
- No

Q16 **What other sources of public funding have you received in 'your' last financial year?** *Please list what sources you received*

Q17 **Have you requested any funding from Creative Wales?**

- Yes
- No

Skills and recruitment

Q18 **Have you experienced difficulties recruiting in the last year?**

- Yes
- No, didn't experience difficulties recruiting
- Not applicable - not recruiting

Q19a *If yes, screen*

Which roles have you had difficulty filling from the following options?

- Production Accountant
- Accounts Assistant/ Cashier
- 1AD
- 2AD
- 3AD
- Runner/ production Assistant
- Production Co-Ordinator
- Costume Maker
- Grip
- Location Manager
- Locations Assistant
- Editor
- Researcher
- Covid Supervisor
- Other

Q19b *If yes, digital*

Which roles have you had difficulty filling from the following options?

- Designer/ Artist
- UX Specialist

- Programmer
- Front End Programmer
- Project Manager
- Producer
- Testing
- Test Manager
- Editor
- Content Designer/ Scriptwriter
- Sound Engineer
- Network Manager
- Customer Service
- Exec Level (Director)
- Other

Q19c *If yes, music*

Which roles have you had difficulty filling from the following options?

- Sound Engineer
- Bar Staff
- Security/ Door Staff
- Merch Sales
- Cleaners
- Equipment Hire
- Vehicle Hire
- Lighting Engineers
- Electricians
- Ticketing
- Other

Q19d *If yes, publishing*

Which roles have you had difficulty filling from the following options?

- Publisher
- Editor (including Assistant Editor/ Copy Editor/ Proof-reader)
- Production Manager
- Designer
- Sales (Director/Manager/ Assistant)
- Marketing (Director/ Manager/ Assistant)
- Publicity (Director/ Manager/ Assistant)
- Rights (Director/ Manager/ Assistant)
- Administrator/ Office Manager
- Finance (Director/Manager/ Assistant)
- Contracts Manager
- Other

Q19e *If yes, other*

Which roles have you had difficulty filling?

Q20 *If yes*

Why do you think this is? Select up to three answers only

- Lack of progression and development opportunities
- Skills gaps in workforce/ applicants
- Lack of awareness and interest in the industry
- People moving away from Wales for employment
- Lack of FE/ HE courses available to obtain relevant qualifications
- Pay
- Competition from other companies

- Financial stability
- Wellbeing factors such as work/life balance
- Job security
- Lack of flexible working conditions
- The creative sector is not seen as credible employment
- Other

Q21 Do you have any skills gaps in the workforce? If you are a freelancer, do you have specific professional development needs?

- Yes
- No

Q22 If yes

What are they? Please tick all that apply

- Welsh language
- Qualifications
- Sector specific knowledge or technical skills gaps that are relevant to the sector
- People skills
- Admin skills
- Management skills
- Technology skills
- Marketing & branding (website, social media)
- Other

Q23 In the last 12 months, where have you recruited and how? Please tick all that apply

- Online sources
- Through an agency
- Word of mouth
- Freelance directory

- Through HE/ FE channels
- Other
- Not applicable

Q24 **How can Creative Wales support you going forward? Select up to three answers only**

- Finance
- Networking
- Business support and advice
- Support with access to work-based training
- Provision of publicly funded FE/ HE courses
- Resources and infrastructure
- Other

Q25 *Freelancers*

Are you registered on the Wales Screen database?

- Yes
- No

Q26 *Freelancers*

In the last two years have you ever considered leaving your profession?

- Yes
- No

Q27 **Why do you say that?**

Welsh language

Q28 Which of the following best describes your ability to speak Welsh?

- I'm fluent in Welsh
- I can speak a fair amount of Welsh
- I can only speak a little Welsh
- I can say just a few words
- I can't speak any Welsh

Q29 Thinking about speaking Welsh at work, do you...?

	<i>Yes, always</i>	<i>Yes, usually</i>	<i>Yes, sometimes</i>	<i>No</i>
Speak Welsh with colleagues about work related matters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speak Welsh with colleagues about issues not related to work (chatting informally)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speak Welsh with customers or people outside your company/ organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read anything in Welsh	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Write anything in Welsh	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>