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Creative Wales Industry Survey 2023 report

Saadiah Hood, Strategic Research and Insight

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

Survey overview

639 respondents from the Welsh creative industries completed the survey, with 27% from publishing, 26% from both the music and digital sectors, and 21% from the screen industry. Respondents included:

- 41% employers/ directors/ owners
- 24% self-employed
- 21% employees
- 13% freelancers
- 18% were fluent in Welsh

The research covers a diverse sample, including a mix of genders, Welsh regions, Welsh speakers and disabled people.

Post-Covid priorities

In 2023, Welsh creative industries are adjusting post-Covid priorities. Key areas include:

- Profitability (47% compared to 54% in 2022)
- Boosting marketing and brand awareness (25% compared to 26% in 2022)
- Increasing the workforce (12% compared to 21% in 2022)

44% of respondents attribute an increase in turnover to heightened business/ work availability, which may suggest positive prospects for their business activities, while 38% face a decrease due to reduced availability of work.

Challenges and opportunities in financial support

Confidence in running businesses profitably varies (19% very confident, 39% somewhat confident and 8% not at all confident).

80% state they have not received any funding, 20% have received grants, with 8% mentioning Creative Wales/ Welsh Government grants

Skills concerns

Despite some recruitment challenges and identified skills gaps, most businesses (92%) have not faced staff retention issues in the past 12 months.

69% of freelancers are finding jobs without difficulty.

However, the industry faces some challenges related to skills gaps (21% of businesses and 24% of freelancers), stressing the need for targeted programmes of support, especially in technology (32%) and sector-specific skills (35%).

Opportunities for increased engagement

61% of respondents are aware of Creative Wales. Key areas for future support include:

- Finance (47%)
- Networking (42%)
- Resources/ infrastructure (23%)

Communication effectiveness

The survey reveals mixed perceptions of Creative Wales' communication effectiveness, with a combined 58% rating its communication channels as average or above.

Email is the preferred information channel (87%), with Facebook and LinkedIn as the most used business-related social media platforms (60% and 32% respectively).

The registration rate on the Wales Screen Production Supplier database is based on survey responses, indicating that 66% of respondents from the screen sector are not registered.

2. Background and methodology

What is the Creative Wales Industry Survey?

Creative Wales (CW) wanted to understand trends and needs in the Welsh creative industries and share their survey findings with the wider industry. This annual survey includes questions about current industry issues and trends, along with standard questions asked each year.

This is the second wave of research following the baseline in 2022 which will highlight common insights across the sectors primarily supported by CW. This in turn will help to inform how CW can best support organisations and individuals in the future.

How was the survey conducted?

CW commissioned Strategic Research and Insight (SRI), an independent agency based in Cardiff, to conduct this research. To enhance response rates and raise awareness of the survey among key stakeholders two approaches were employed – telephone surveys and online surveys.

The telephone survey targeted creative industries in Wales using a database obtained from an approved data broker.

A total of 1,594 businesses were provided containing:

- Business name
- Address/ postcode
- Telephone number
- Companies registration number
- Number of employees (where applicable)
- Contact name, role/ position
- Business activity
- Standard Industrial Classification (SIC 2007) and description

Overleaf is a breakdown of the number of businesses approached via telephone by each sector and the total number of completed responses.

The online survey was conducted alongside the telephone survey. An online link was shared through CW's contacts, and SRI approached sector-relevant individuals for additional distribution. The link to the survey was actively promoted and shared through diverse channels, using the reach of these contacts to ensure broad participation across sectors.

Sampling approach

The sample covered the four regions in Wales – North, Mid, South West and South East. The target sample size was 500 interviews, but this was exceeded, with SRI conducting 639 interviews by telephone and online with individuals and organisations in the creative industries throughout November and December 2023. This represents a significant increase from the previous year, where 344 responses were achieved.

This consisted of businesses and freelancers that represent the main sectors supported by CW, which make up the CW definition of the creative industries in Wales.

CW Sector	Creative industries approached via telephone[1]	Total number of completed responses		
		Telephone	Online	Total respondents
Music	290	29	136	165
Screen	268	82	54	136
Digital	544	37	128	165
Publishing	492	30	143	173
Total	**1,594**	**178**	**461**	**639**

Survey topics

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

- Business profile
- Employment
- Business aspirations
- Skills and recruitment
- Creative Wales
- Other channels
- Welsh language capabilities

The final questionnaire consisted of 24 questions. Closed question types were most commonly used to allow for quantitative analysis, but three were open-ended questions, allowing respondents the opportunity to offer deeper insights into the industry.

1 Business data of creative industries in Wales, obtained from an approved data broker.

What does this report cover?

The aim of the report is to help Creative Wales to gain a better understanding of the current state of the sector as it navigates beyond the pandemic, collecting information that will support recovery of the creative industries in Wales. This report covers the following:

- Headline findings
- Background and methodology
- Main findings
- Implications for Creative Wales

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

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?

All numbers and percentages cited in this report are from the combined total of respondents from both telephone and online surveys. The first section of the questionnaire was used for filtering and to understand the business makeup; this report discusses the findings of the main questions from Q8 to Q24.

It is essential to be careful when looking at results for smaller subgroups. Some questions did not get full responses due to routing, resulting in smaller sample sizes. When there are very few responses, we focus on the number of respondents rather than the percentage.

Note that when comparing findings between 2022 and 2023, differences in sample sizes should be considered. The 2023 sample exceeded the target size, which may affect direct comparisons with 2022

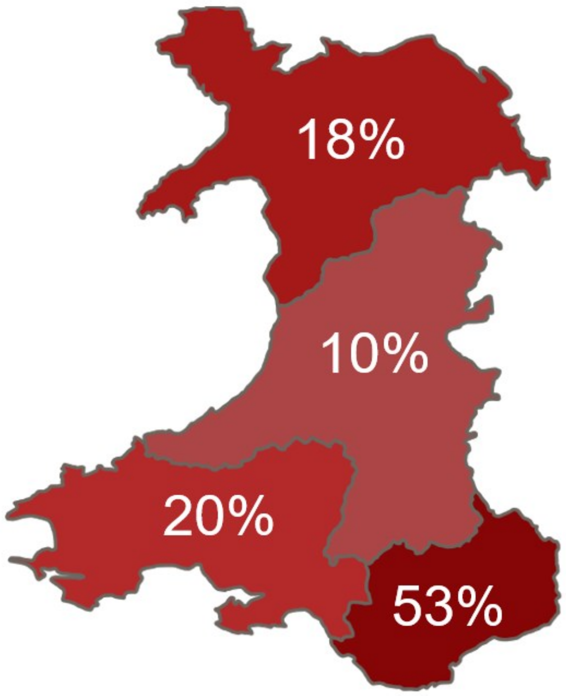
3. Business profile

Sample distribution

The research began with a screening question (in both telephone and online surveys) to ensure only eligible respondents who work in the CW sectors were included.

In this year's survey, the second wave of the research, a more equal distribution of interviews was achieved for each of the CW sectors.

The research also achieved a good spread of respondents geographically, broadly representative of the regional distribution of the population of Wales. The illustration shows the spread of the completed interviews by subsector and region.



Sector	Response		Number employed[2]	
Music	165	26%	8,800	27%
Screen	136	21%	6,200	19%
Digital	165	26%	7,400	23%
Publishing	173	27%	11,000	34%

Region	Response		Number employed[3]	
North Wales	114	18%	698,400	22%
Mid Wales	61	10%	205,000	7%
South East Wales	337	53%	1,530,000	49%
South West Wales	127	20%	702,000	22%

Business characteristics

In exploring the business characteristics, Cardiff stands out as a hub, with 26% of businesses based there. Furthermore, business owners and directors represent 41% of respondents, highlighting a substantial entrepreneurial presence.

The majority (73%) have been trading for over a decade, showing stability in the industry. Legal structures vary, with:

- 37% being private limited companies
- 35% sole proprietorships
- 55% are micro-businesses with 1-9 employees

2 Source: Ad-hoc statistical requests: 6 to 17 November 2023 | GOV.WALES

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

The research uncovers important diversity aspects in parts of the creative workforce and offers insights into its current demographics. The following tables illustrate the spread of the completed interviews.

In summary, 63% are men, 34% are women, and 2% would prefer not to specify. Looking at ethnicity, respondents predominantly identify as White (95%). Nationality shows that more than half (57%) consider themselves Welsh, and 29% British or Irish.

Profiles by region

	Total	Region			
Employment status		North	Mid	South East	South West
I am self-employed	**152 (24%)**	29 (25%)	14 (23%)	67 (2%)	42 (33%)
I am a freelancer	**86 (13%)**	11 (1%)	1 (2%)	54 (16%)	20 (16%)
Currently an employee of the company	**136 (21%)**	23 (2%)	15 (25%)	69 (2%)	29 (23%)
An employer/ director/ owner	**265 (41%)**	51 (45%)	31 (51%)	147 (44%)	36 (28%)

	Total	Region			
Business started trading		North	Mid	South East	South West
In the last 2 years	**29 (5%)**	6 (5%)	2 (3%)	20 (6%)	1 (1%)
2-5 years ago	**67 (1%)**	13 (11%)	6 (1%)	35 (1%)	13 (1%)
6-10 years ago	**78 (12%)**	13 (11%)	5 (8%)	49 (15%)	11 (9%)
More than 10 years ago	**465 (73%)**	82 (72%)	48 (79%)	233 (69%)	102 (8%)

	Total	Region			
Legal status of the business		North	Mid	South East	South West
Sole proprietorship/ trader	**225 (35%)**	37 (32%)	15 (25%)	112 (33%)	61 (48%)
Private limited company, limited by shares (LTD)	**235 (37%)**	46 (4%)	27 (44%)	125 (37%)	37 (29%)
Private company limited by guarantee	**18 (3%)**	4 (4%)	2 (3%)	12 (4%)	-
Partnership	**26 (4%)**	8 (7%)	3 (5%)	11 (3%)	4 (3%)
Limited liability partnership	**62 (1%)**	10 (9%)	4 (7%)	43 (13%)	5 (4%)
Charitable Incorporated Organisation	**30 (5%)**	2 (2%)	7 (11%)	14 (4%)	7 (6%)
Other	**43 (7%)**	7 (6%)	3 (5%)	20 (6%)	13 (1%)

Ethnicity of respondent	Total	Region			
		North	Mid	South East	South West
White	**604 (95%)**	107 (94%)	59 (97%)	316 (94%)	122 (96%)
Mixed/ Multiple ethnic groups	**8 (1%)**	1 (1%)	-	6 (2%)	1 (1%)
Asian / Asian British	**6 (1%)**	2 (2%)	-	4 (1%)	-
Black / Black British	**1 (0%%)**	-	-	-	1 (1%)
Other	**5 (1%)**	1 (1%)	-	3 (1%)	1 (1%)
Refused	**15 (2%)**	3 (3%)	2 (3%)	8 (2%)	2 (2%)

Profiles by sector

Employment status	Total	Sector			
		Music	Screen	Digital	Publishing
I am self-employed	**152 (24%)**	50 (3%)	29 (21%)	30 (18%)	43 (25%)
I am a freelancer	**86 (13%)**	32 (19%)	42 (31%)	8 (5%)	4 (2%)
Currently an employee of the company	**136 (21%)**	34 (21%)	23 (17%)	23 (14%)	56 (32%)
An employer/ director/ owner	**265 (41%)**	49 (3%)	42 (31%)	104 (63%)	70 (4%)

Business started trading	Total	Sector			
		Music	Screen	Digital	Publishing
In the last 2 years	**29 (5%)**	6 (5%)	2 (3%)	20 (6%)	1 (1%)
2-5 years ago	**67 (1%)**	13 (11%)	6 (1%)	35 (1%)	13 (1%)
6-10 years ago	**78 (12%)**	13 (11%)	5 (8%)	49 (15%)	11 (9%)
More than 10 years ago	**465 (73%)**	82 (72%)	48 (79%)	233 (69%)	102 (8%)

	Total	Sector			
Legal status of the business		Music	Screen	Digital	Publishing
Sole proprietorship/ trader	**225 (35%)**	75 (45%)	55 (4%)	45 (27%)	50 (29%)
Private limited company, limited by shares (LTD)	**235 (37%)**	36 (22%)	51 (38%)	74 (45%)	74 (43%)
Private company limited by guarantee	**18 (3%)**	7 (4%)	5 (4%)	-	6 (3%)
Partnership	**26 (4%)**	4 (2%)	2 (1%)	8 (5%)	12 (7%)
Limited liability partnership	**62 (1%)**	13 (8%)	3 (2%)	34 (21%)	12 (7%)
Charitable Incorporated Organisation	**30 (5%)**	16 (1%)	4 (3%)	1 (1%)	9 (5%)
Other	**43 (7%)**	14 (8%)	16 (12%)	3 (2%)	10 (6%)

	Total	Sector			
Ethnicity of respondent		Music	Screen	Digital	Publishing
White	**604 (95%)**	160 (97%)	123 (9%)	159 (96%)	162 (94%)
Mixed/ Multiple ethnic groups	**8 (1%)**	1 (1%)	4 (3%)	1 (1%)	2 (1%)
Asian / Asian British	**6 (1%)**	1 (1%)	2 (1%)	1 (1%)	2 (1%)
Black / Black British	**1 (0%%)**	-	-	1 (1%)	-
Other	**5 (1%)**	2 (1%)	3 (2%)	-	-
Refused	**15 (2%)**	1 (1%)	4 (3%)	3 (2%)	7 (4%)

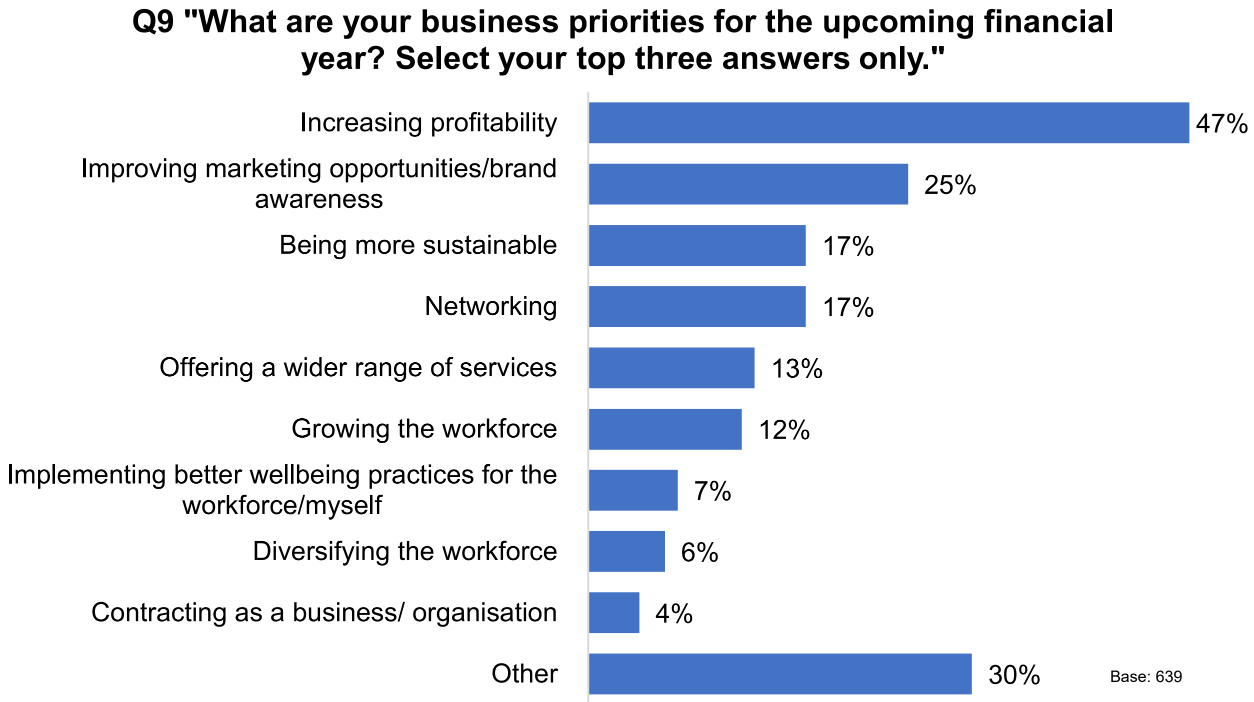
4. Employment

Overview of the surveyed workforce

4.1 The following table presents data on the number of people employed within the last year, as reported by business owners. Please note that this question was directed solely at business owners to gather insights into their specific workforce composition and size.

In the last year, how many people did your business employ that are...?				
Number of staff	1-9 people	10-49 people	50-249 people	250+ people
Full-time staff	208	12	3	
Part-time staff	69	4	-	-
Freelancers	54	26	5	2
Apprentices	10	-	-	-
Trainees	14	-	-	-
Volunteers	14	8	1	-

5. Business aspirations



The top 3 business aspirations by region are:			
North (114)	**Mid (61)**	**South East (337)**	**South West (127)**
Increasing profitability (48%)	*Improving marketing opportunities (39%)*	*Increasing profitability (52%)*	*Increasing profitability (39%)*
Improving marketing opportunities (22%)	*Increasing profitability (34%)*	*Improving marketing opportunities (23%)*	*Improving marketing opportunities (24%)*
Networking (16%)	*Being more sustainable (18%)*	*Being more sustainable (20%)*	*Networking (16%)*

The top 3 business aspirations by sector are:			
Music (165)	**Screen (136)**	**Digital (165)**	**Publishing (173)**
Increasing profitability (42%)	*Increasing profitability (55%)*	*Increasing profitability (48%)*	*Increasing profitability (45%)*
Improving marketing opportunities (23%)	*Networking (33%)*	*Improving marketing opportunities (24%)*	*Improving marketing opportunities (31%)*
Being more sustainable (19%)	*Growing the workforce (18%)*	*Being more sustainable (18%)*	*Offering a wider range of services (16%)*

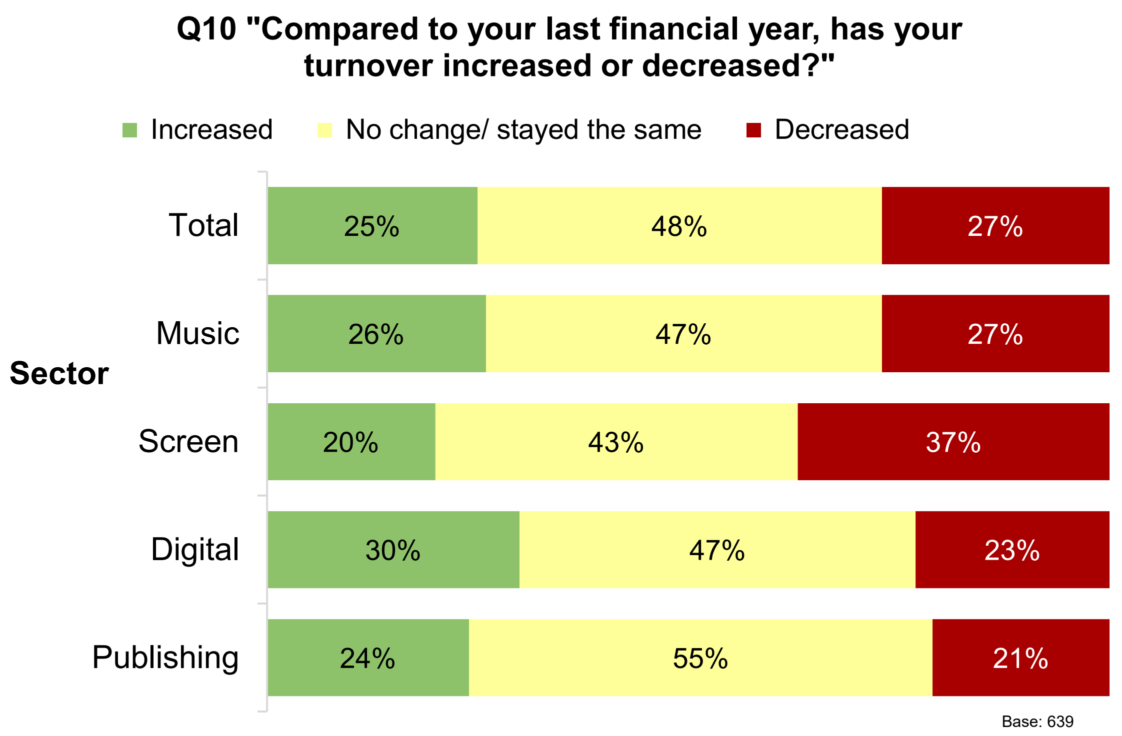
Profitability is still a top focus

5.1 Creative industries in Wales are mainly focused on increasing profitability (47%) and improving marketing opportunities (25%) in the coming year. This priority is consistent across regions, except in mid Wales, where the focus shifts more towards improving marketing.

When comparing the 2022 and 2023 surveys, it is evident that increasing profitability remains the top priority for businesses. In 2022, 54% considered it the main goal, followed by growing the workforce (21%) and sustainability (19%). Interestingly, the focus on increasing the workforce has decreased from 21% in 2022 to 12% in 2023.

The top 3 business aspirations by Business Type are:			
Self-employed (152)	**Freelancer (86)**	**Employee (136)**	**Employer (265)**
Increasing profitability (45%)	*Increasing profitability (48%)*	*Increasing profitability (40%)*	*Increasing profitability (52%)*
Improving marketing opportunities (23%)	*Networking (36%)*	*Improving marketing opportunities (30%)*	*Improving marketing opportunities (28%)*
Networking (16%)	*Offering a wider range of services (15%)*	*Being more sustainable (23%)*	*Growing the workforce (18%)*

5.2 In addition to the top priorities identified, a significant number of respondents provided 'other' responses, highlighting a diverse range of business objectives and challenges. These responses included goals such as finding new ways to boost revenue, improving digital skills, and ensuring legal and quality standards are met. These are a few additional options that could be included in the next wave of surveys.



Less turnover change in 2023

5.3 In 2023, businesses saw less change in turnover compared to 2022. For the latest financial year, 25% saw an increase, 27% had a decrease, and 48% reported no change. In 2022, 35% experienced an increase, 28% had a decrease, and 37% saw no change. Even though fewer businesses reported turnover changes from 2022 to 2023, many still experienced significant shifts compared to the previous year.

5.4 In examining the results of respondents who reported changes in turnover in 2023 and cross-tabulating them based on the level of change, it was found that among those reporting a reduction (170 respondents):

- 57 experienced a decline of 1-20%
- 34 experienced a decline of 21-40%
- 33 experienced a decline of 41-60%
- 5 experienced a decline of 61-80%
- 9 experienced a decline of 81-60%
- 4 experienced a decline of more than 100%
- 28 didn't know

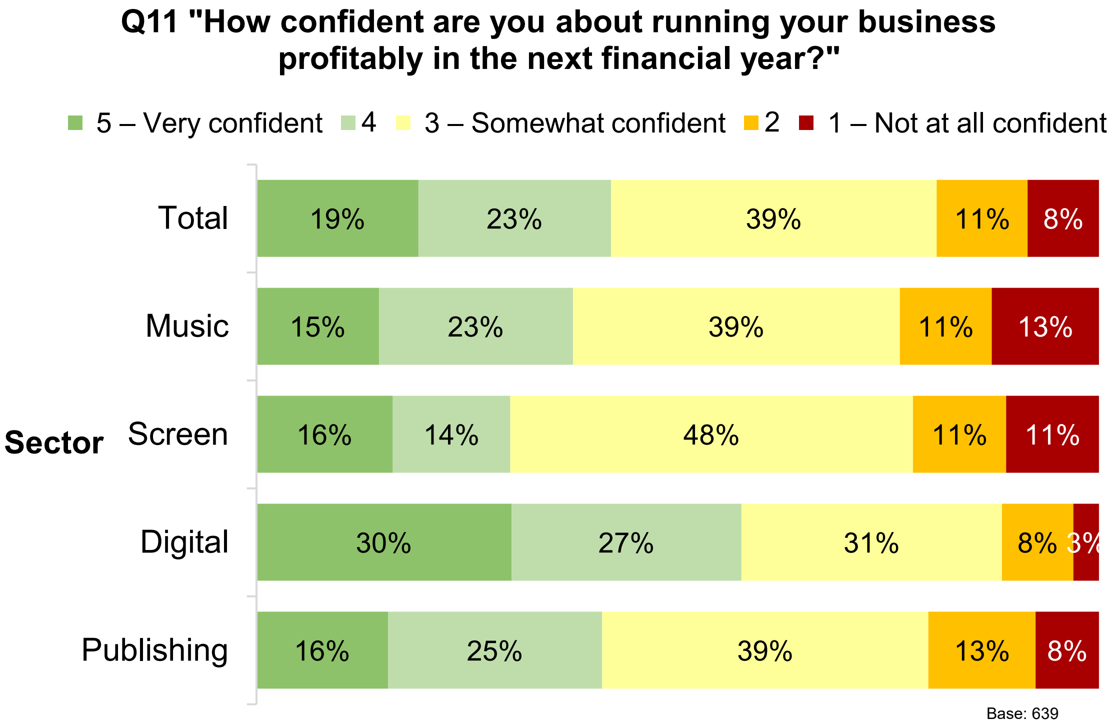
5.5 Similarly, among those reporting an increase (160 respondents)

- 92 a rise of 1-20%
- 21 a rise of 21-40%
- 6 a rise of 41-60%
- 1 a rise of 61-80%
- 2 a rise of 81-60%
- 7 a rise of more than 100%
- 30 didn't know

5.6 The 2023 survey shows that increased business/ work availability (44%), heightened awareness of the business/ work (27%), and the impacts following the Covid-19 pandemic (19%) are the primary factors contributing to an increase in turnover.

5.7 On the other hand, the rising living costs (45%), a decrease in business/ work availability (38%) and affects arising from the Covid-19 pandemic (31%) are major contributors to reduced turnover. Other factors, such as changes in consumer behaviour, play notable roles in both scenarios.

Differences by sector

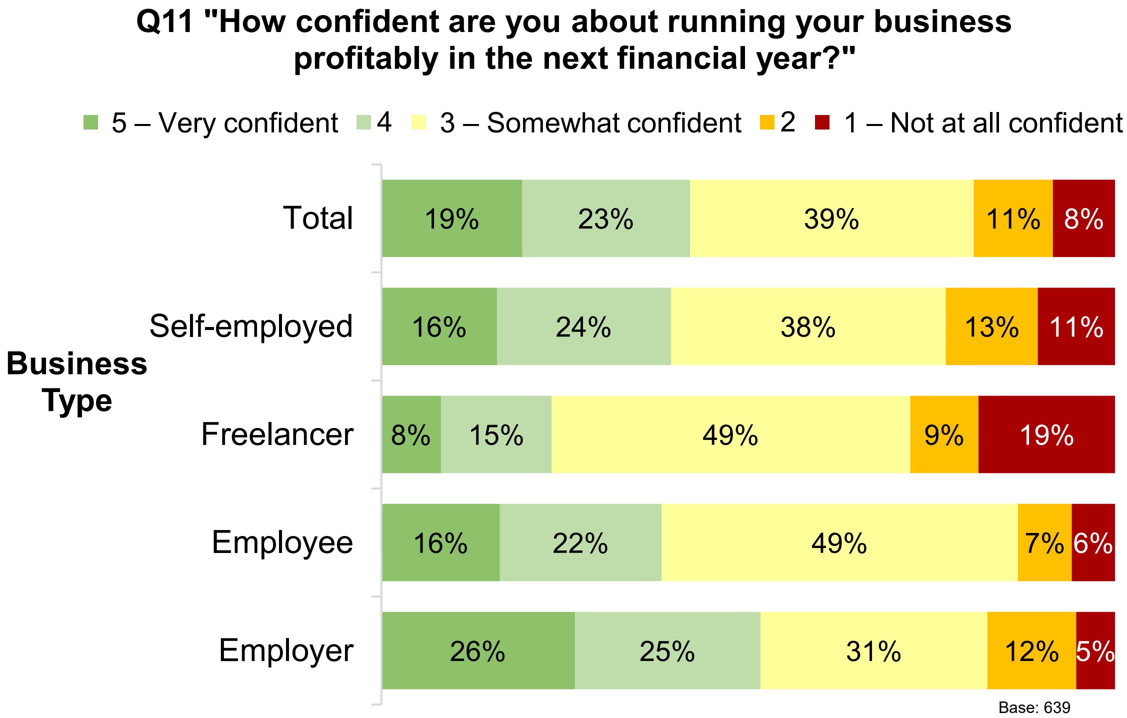


Slight shift in confidence in 2023

5.8 When comparing confidence across sectors, variations are evident, with the digital sector showing the most confidence about running a profitable business and the music sector the least.

5.9 Comparing 2023 to 2022, there is a noticeable change in confidence levels. In 2023, more respondents express very high confidence, while fewer feel somewhat confident. However, the total percentage of respondents feeling no confidence or less confidence remains consistent between the two years.

Differences by business type



Employer confidence outshines freelancers in business outlook

5.10 Differences in confidence levels across business types show varied outlooks. Self-employed individuals mostly express somewhat confidence (38%), while both freelancers and employees report similar levels of somewhat confidence (49%). In contrast, employer, director, or owner roles display the highest confidence in running a profitable business, with 26% reporting as very confident.

Funding support and sources

5.11 Most respondents (80%) report not receiving any funding support during that financial year. Among those who did receive funding, Creative Wales/ Welsh Government grants (8%) and Arts Council of Wales funding (6%) are among the more often mentioned sources. Less commonly mentioned sources include business rates grants, council grants, self-employment grants and other funding options.

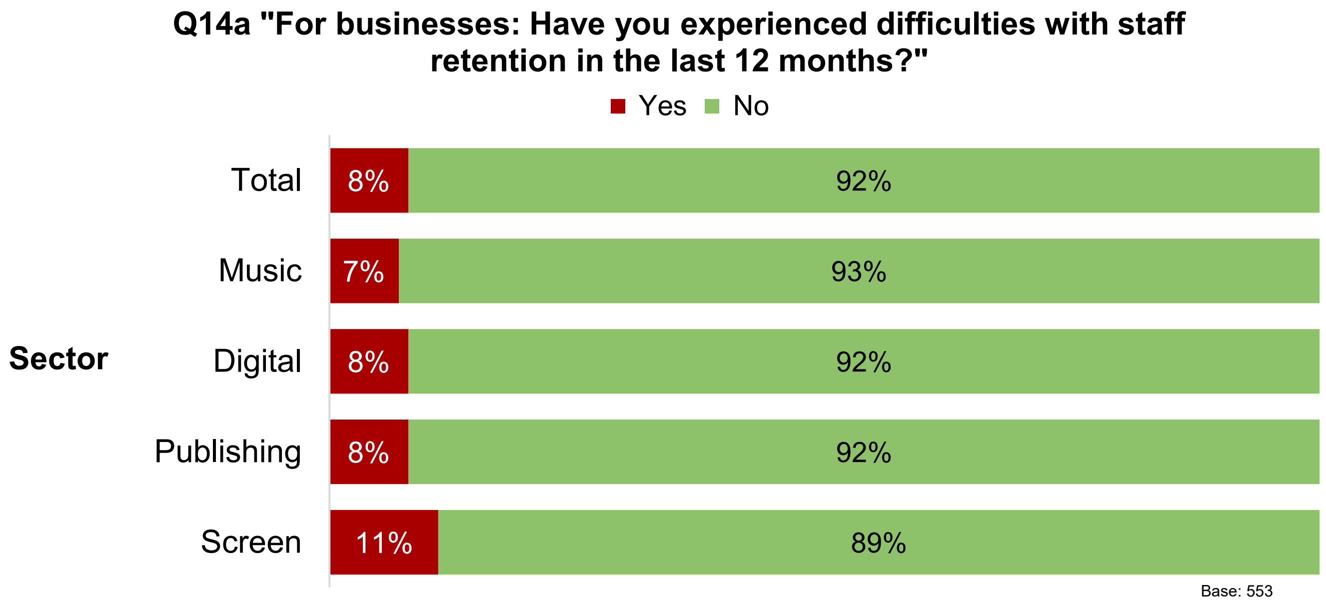
6. Skills and recruitment

6.1 In the last year, businesses have employed diverse recruitment methods, including:

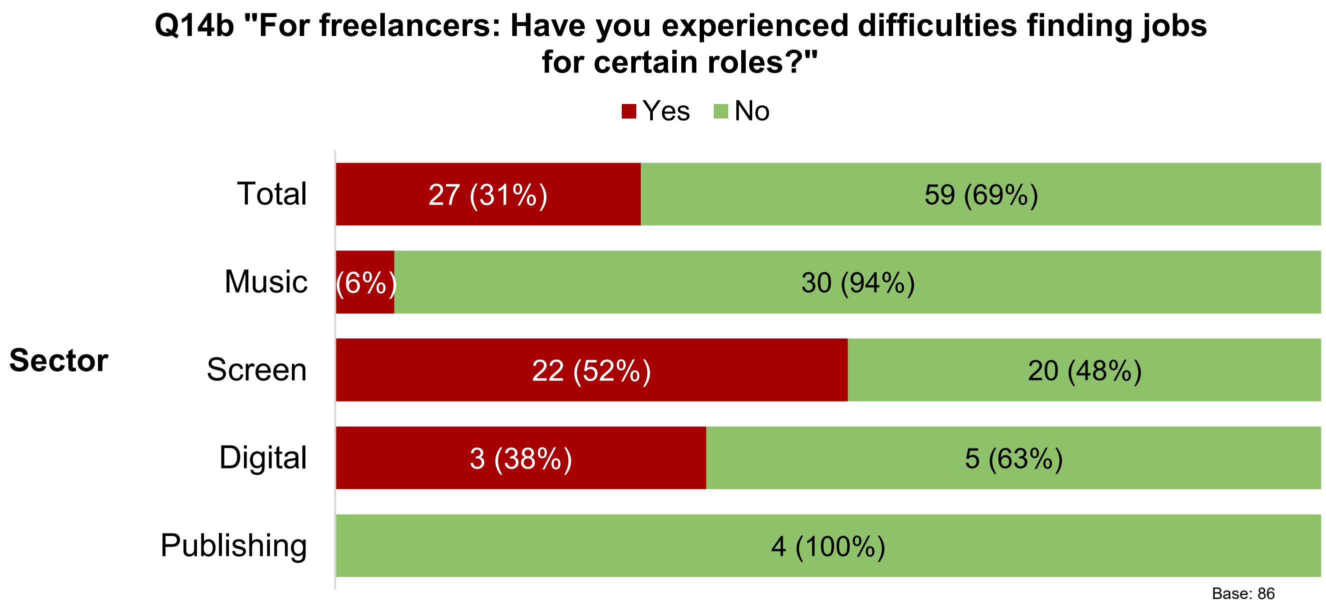
- Online sources (20%)
- Word of mouth (18%)
- Freelance directories, and agencies (4% each)

6.2 A significant proportion (63%) reported no recruitment activities.

What recruitment difficulties have businesses been faced with?



6.3 Looking at staff retention challenges, 8% of businesses overall had trouble keeping employees, and this trend was similar across sectors.

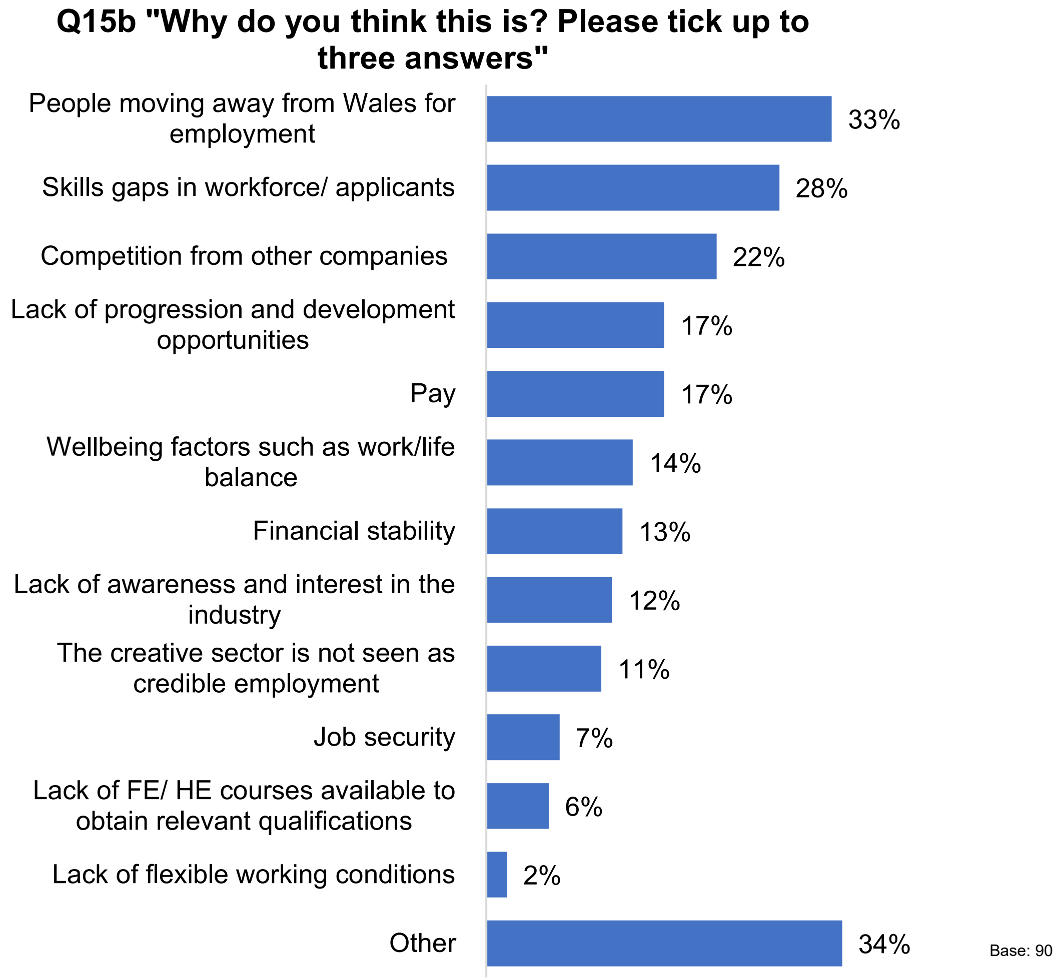


Freelancers face higher job challenges than businesses

6.4 A higher percentage of freelancers (31%) faced difficulties in finding jobs for certain roles compared to businesses (8%) experiencing challenges with staff retention. Additionally, within the freelancing sector, freelancers in the screen and digital sectors reported more difficulties (52% and 38%, respectively) compared to freelancers in the Music sector (6%). Four freelancers in the Publishing sector did not report any challenges in finding jobs for certain roles. It is important to note that this observation is based on a small sample size of four respondents, with similar low responses in the digital sector.

The sectors top 3 challenging roles to fill are:			
Music (20)	**Screen (83)**	**Digital (57)**	**Publishing (51)**
Sound Engineer	*Researcher*	*Designer/ Artist*	*Marketing (Director/ Manager/ Assistant)*
Bar Staff	*Runner/ Production Assistant*	*Programmer*	*Designer*
Lighting Engineers	*Editor*	*UX Specialist*	*Editor (including Assistant Editor/ Copy Editor/ Proofreader)*

Factors contributing to recruitment challenges for businesses



Q15b has been asked to those experiencing recruitment difficulties

Continuing struggles in skill acquisition and talent retention

6.5 Despite a decrease from 18% in the 2022 survey, 16% of businesses still encounter difficulties in filling specific roles, reasons cited above.

6.6 Other factors also contribute to these challenges, including concerns about wellbeing, financial stability, industry reputation, job security, limited educational opportunities, lack of flexible work conditions, as well as the impact of technological advancements on skill requirements and the need for ongoing training or upskilling. Respondents highlighted various factors influencing their experiences within the creative industry. Direct quotes reflecting their perspectives include:

Wellbeing factors

"Covid has made people not want to go back to work."

"Personal circumstances"

Financial stability

"Hard to compete with some London agencies allowing remote working and high levels of pay."

"The technical arm of the creative industry is shrinking due to poor working conditions and pay."

Industry perception

"No government encouragement for teaching of our ancient traditions or anything else in Cymraeg."

"Understanding of what is needed."

Job security

"Cwmnïau o Loegr yn symud mewn dros dro a chynnig cyflogau gwell – English companies move in temporarily and offer better wages."

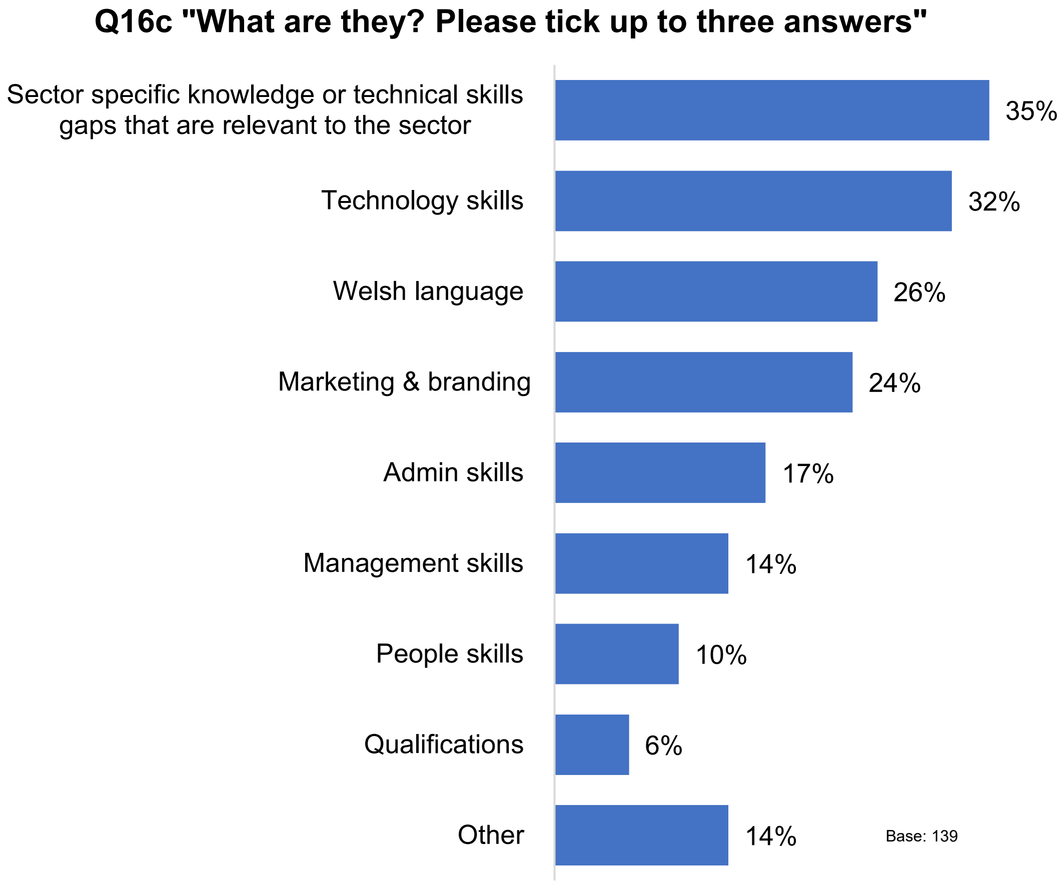
"Job needs come and go depending on the production currently on or time of year, so no set reason."

Limited education courses

"Lack of supply of AV engineers."

"Not enough trade."

What skills gaps are businesses faced with?



Q16c has been asked to those having a skills gap (both businesses and freelancers)

Sector-specific and technology skills are still an issue for some

6.7 Skills and training remain an issue for some in the industry. 21% of businesses lack certain skills, while 24% of freelancers need specific training.

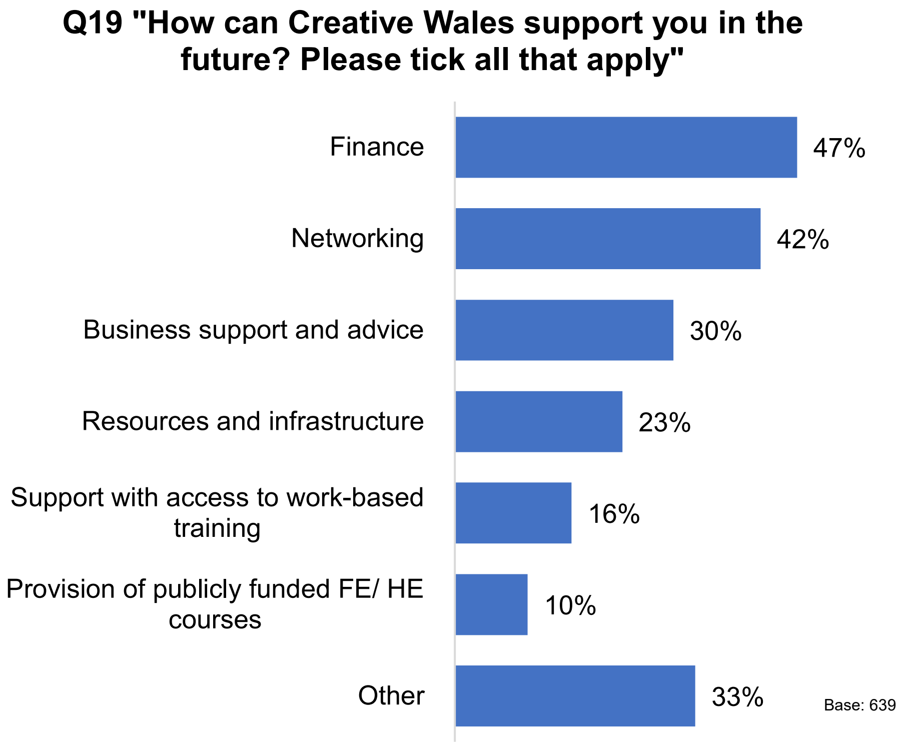
6.8 The most common areas where skills gaps exist include:

- Sector-specific skills (35%)
- Technology (32%)
- Welsh language ability (26%)

6.9 The survey also asks about businesses' investment in employee training and skill development. Nearly a third of businesses (29%) report offering training and skill-building programmes for their employees. However, the majority (71%) do not provide such opportunities.

7. Creative Wales

How can Creative Wales support the industry?



Priorities in 2023 are similar to 2022

7.1 In the 2023 survey, 61% of respondents have heard of Creative Wales, suggesting substantial awareness within the surveyed population. The awareness is highest among the screen and digital sector (76% and 65% respectively) but also higher with freelancers and employers/ directors/ owners of the company (65% and 62% respectively).

7.2 When asked about how Creative Wales can better support the sectors, as with the 2022 survey the top three areas that stand out are finance, networking, and business support and advice. In this survey, finance is still a top priority for almost half (47%) highlighting the need for financial help within the creative sector. Networking is another crucial aspect post-Covid with 42% expressing a desire for support in building connections. Additionally, 30% are interested in business support and advice.

7.3 Around a third (33%) of the responses fell into the ‘other’ category, showing various needs within the creative industry. Some key points from ‘other’ responses include businesses and freelancers seek support and collaboration in areas like recognising the technical side of the creative field, promoting and advertising, community and cultural support, and some mention a lack of awareness about Creative Wales and its services.

Recognition of technical skills

7.4 Some respondents highlighted the importance of acknowledging the technical side of the creative industries. They stress the need for a network of businesses and freelancers to sustain and enhance the Welsh creative industries over the longer term.

“Acknowledge the technical part of the creative industries and recognise that an entire ecosystem of businesses and freelancers is required.”

“Develop a route for apprenticeships into the AV / Creative Technical support industry. University qualifications are useless and just saddle graduates with debt and no practical skills.”

Active promotion and advertisement

7.5 Some respondents express the need for active promotion and advertising, both locally and for incoming productions. They mention improved signage, financial support for creating booklets, and advertisements for galleries and murals.

“Advertising and promoting at events, improved signage, money to produce a booklet about the gallery with examples of the work featured.”

“Active promotion to incoming productions of workers and skills available locally.”

Marketing and social media support

7.6 A common theme is the need for support in marketing and social media. Some respondents seek guidance on building online presence, while others desire help with platforms like Twitter, Instagram and LinkedIn.

“Help with marketing, especially assistance with social media as I’m dyslexic.”

“Help with Twitter, Instagram, and LinkedIn. I’ve got them but I don’t know how to use them.”

Advocacy and international promotion

7.7 Several respondents are interested in advocacy and support for film exhibition, promotion for Welsh artists, and international advocacy. They suggest supplying marketing materials, brokering relationships and promoting Welsh culture on an international scale.

“Advocacy on an international scale, artists are concerned about the environments across Europe.”

“Advocate and support for film exhibition and promotion for Welsh artists, that’s the area we really need big support.”

Community and cultural support

7.8 People want help to preserve and promote Welsh culture, including supporting language diversity and making culturally important films.

"If you are only going to support businesses, then you have a narrow vision for cultural and language diversity."

"Ensuring more equitable access to funding and support for Screenwriters."

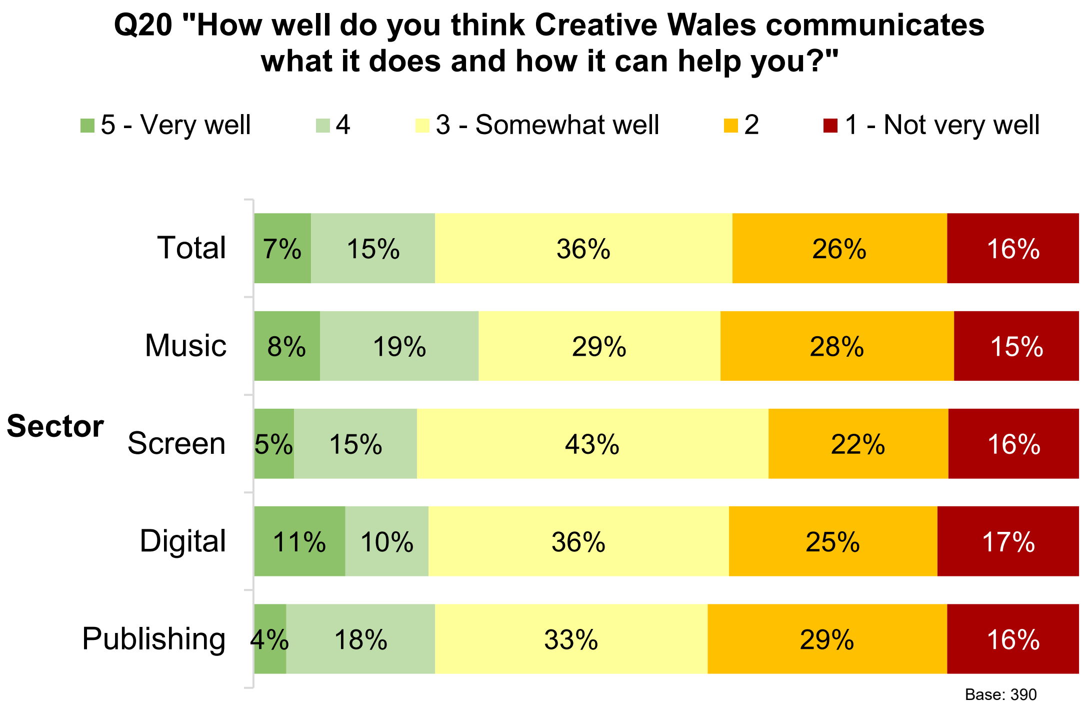
Uncertainty and lack of awareness

7.9 Some respondents express uncertainty about Creative Wales and its offerings, while others say they don't need or seek support.

"I don't really know - I didn't know help was out there."

"I'm not sure exactly what they do. I don't really need any of the above."

Communication with the creative industry

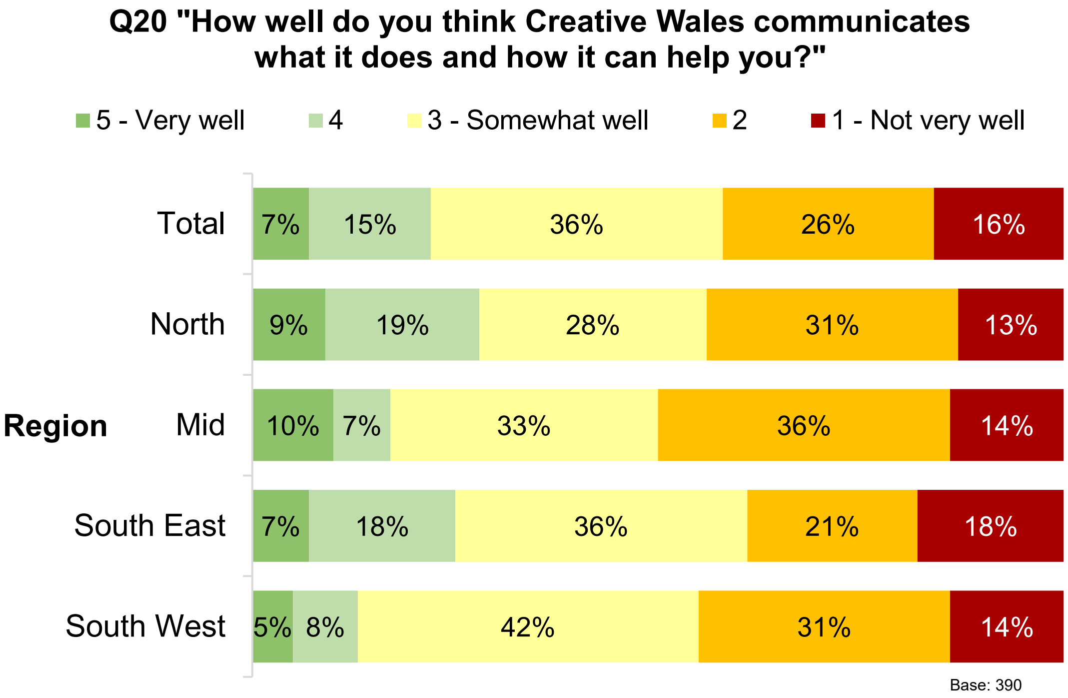


Q20 has been asked to those aware of Creative Wales

7.10 When looking at how well Creative Wales talks about what it does and the help it offers, opinions differ across different areas. For instance, those in the digital sector tend to think Creative Wales communicates well, with 11% saying they do this very well. The music sector also sees the communication positively, with 27% rating it as very well or well.

7.11 Among those who know about Creative Wales, 22% think it communicates very well or well overall. However, more than two fifths (42%) rate it at the lower end of the scale, which means there is room to make it better. These findings suggest that Creative Wales could improve its messaging, especially about what it does and how it helps the creative industries in Wales.

Differences by region



Q20 has been asked to those aware of Creative Wales

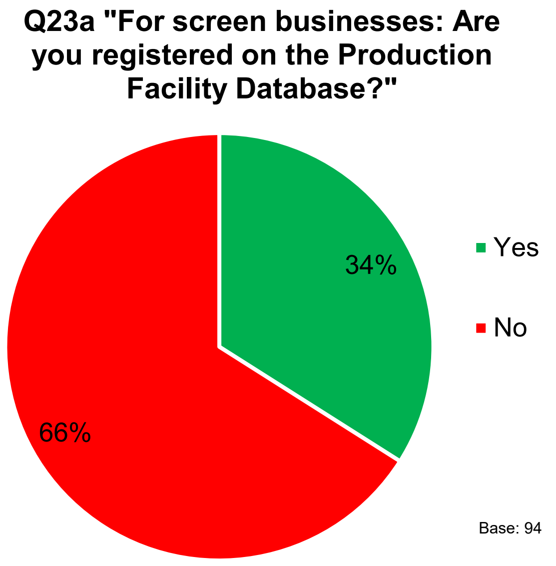
7.12 Feelings about how well Creative Wales communicates its activities and support vary across of the regions of Wales, much like across sectors. While the North and South East regions have higher proportions of positive ratings for Creative Wales' communication, with 28% and 25% respectively, the Mid region shows a lower rate of positive ratings at 17%.

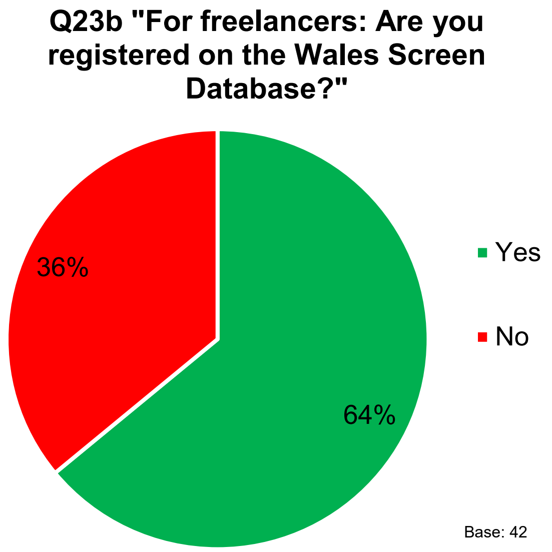
7.13 Although preferred communication channels were not asked about in 2022, the 2023 results show that 87% of people prefer to receive news and information from Creative Wales via email with many respondents from the music and digital sectors preferring this method. Telephone follows at 12%, while social media, postal mail, and other methods are less preferred. When it comes to social media channels used for business, respondents rely on:

- Facebook (60%)
- Instagram (49%)
- LinkedIn (32%)
- X (previously Twitter) (26%)

7.14 This shows a diverse range of platforms used by people for professional networking and information sharing. When comparing these platforms across different sectors, variations are noticeable, with Facebook being popular among those in the music sector and Instagram slightly more favoured among those in the screen and music sectors.

8. Other channels





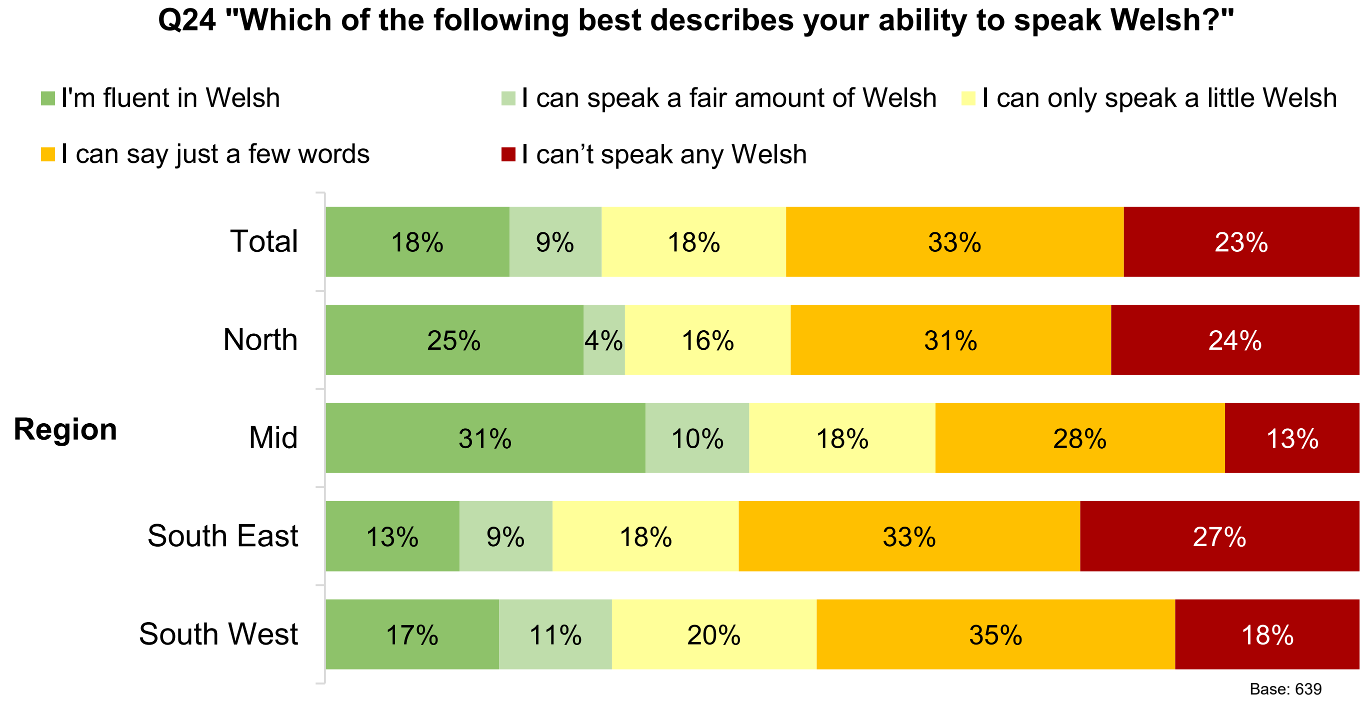
Q23a/b has been asked to those in the screen sector

Opportunities for improved visibility and collaboration

8.1 In the screen sector, more than a third of businesses are registered on the Production Facility database, while freelancers show a higher rate of registration on the Wales Screen Freelance Crew database.

8.2 This indicates that businesses and freelancers in the creative industry are registering and engaging to some extent. Yet, there is still opportunity for more participation to boost visibility and collaboration within the sector.

9. Welsh language capabilities



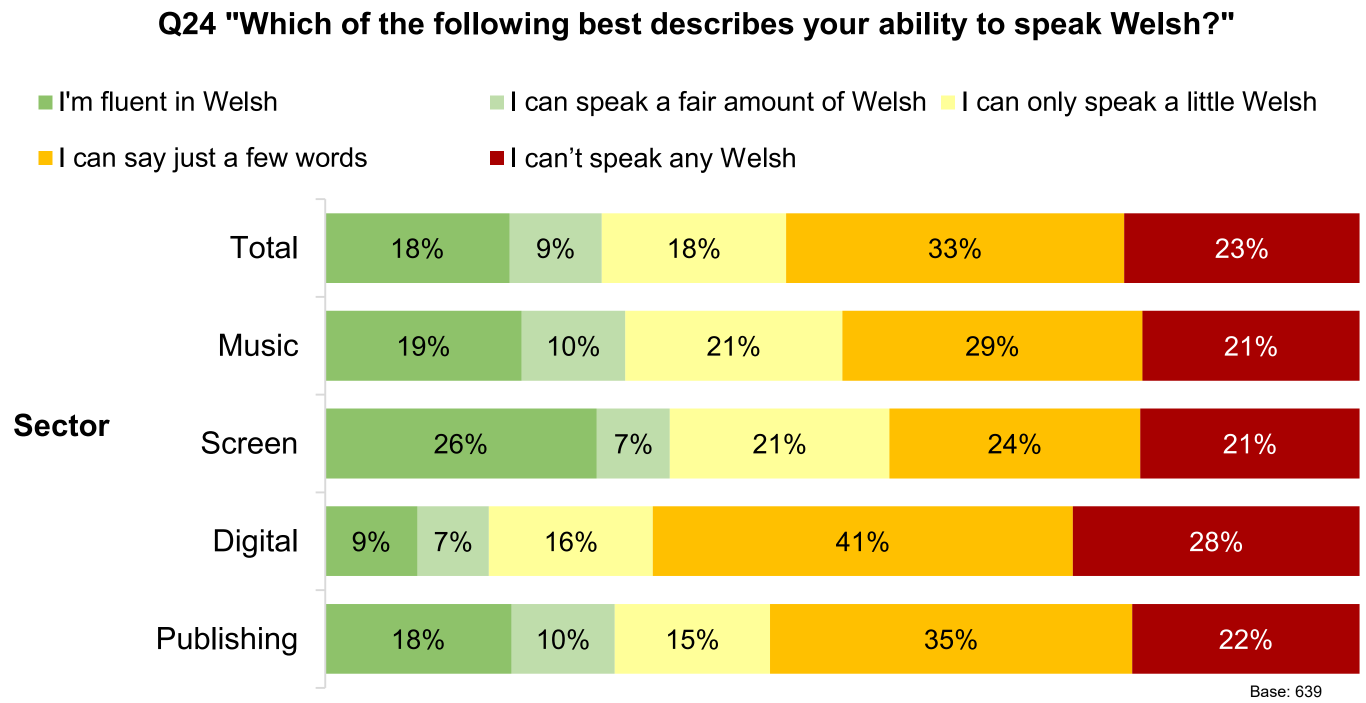
One in four can speak Welsh, either fluently or a little

9.1 Welsh language ability is consistent with 2022 findings, with 18% of respondents being fluent in Welsh and 33% able to speak a few words. As of the latest available data[4], approximately 29% of the population in Wales can speak Welsh, with around 19% being fluent speakers. However, ability levels may vary depending on the region and demographic factors.

9.2 Welsh language ability levels of respondents vary regionally, for instance in the South West over half (55%) can either speak a few words or speak only a little Welsh. In the Mid region, 41% report some ability (fluent or speak a fair amount of Welsh) to speak Welsh, with 31% being fluent. The South East has the highest percentage of respondents with no Welsh proficiency at 27%.

4 Source: [Annual population survey 2022-2023]

Differences by sector



9.3 Proficiency in Welsh language differs among creative sectors, with the Screen industry showing the highest fluency at 26%, while the Digital sector shows the lowest ability levels.

10. Implications for Creative Wales

Tailor initiatives for creative growth in Wales

The insights drawn from business aspirations, reported turnover changes, and sector confidence provide a strategic roadmap for Creative Wales.

Tailoring initiatives to address key priorities identified by businesses, such as profitability, marketing and sustainability, could enhance support for the creative industries.

Aligning support efforts with these identified needs ensures a more impactful and responsive approach, developing a thriving creative network in Wales

Boost opportunities

Identification of skills gaps, recruitment challenges, and the demand for sector-specific skills uncovers significant opportunities for Creative Wales to help with addressing workforce development needs.

The results indicate that developing targeted programmes to bridge these skills gaps, enhance technology training, and foster collaboration with educational institutions would be beneficial.

By addressing these industry-specific skills requirements, Creative Wales can play a critical role in encouraging a skilled and adaptable creative workforce, contributing to the sector's continued growth.

Recommendations for inclusive and supportive initiatives

The suggestion is to design initiatives that not only promote diversity within the creative sector but also support Welsh language initiatives and address wellbeing concerns.

Continue to drive growth across the creative industries

The ongoing need for financial help, networking, and business support highlights the current needs of the creative industry. The results have shown the role of Creative Wales as a facilitator providing essential financial support, promoting networking opportunities, and offering business advisory services. Through these efforts, Creative Wales can contribute to the resilience and prosperity of the creative community in Wales.

Increase visibility and reinforce collaboration

While awareness levels of Creative Wales are positive, there is room for improvement in communication effectiveness.

Enhancing communication strategies to reach a wider audience, particularly through the preferred channel of email, is important according to the results. Addressing feedback for more effective engagement ensures that Creative Wales stays a transparent and accessible partner, strengthening collaboration within the creative community.

Registration rates on certain databases present clear opportunities for Creative Wales to enhance visibility and collaboration. Encouraging more businesses and freelancers to join databases will boost collaboration, making the creative network stronger. This will enhance the effectiveness of Creative Wales' support efforts by fostering a more connected sector.

Sector outlook

The results on Welsh language proficiency reflect sector and geographic variations.

To celebrate and support the Welsh language, initiatives should be applied to ensure inclusivity and acknowledge the cultural richness of the creative industries. By actively engaging with the Welsh language, Creative Wales contributes to the preservation of cultural heritage and promotes a vibrant and diverse creative landscape.

2022 compared to 2023

Comparing the 2022 findings with 2023, there are both continuities and some changes in the findings. The ongoing demand for financial help and networking support is evident in both surveys, showing an ongoing need within the creative industries. While the digital sector continues to show higher confidence levels than other creative sectors, some businesses still face skills shortages, particularly in filling high-level roles, echoing the 2022 findings.

In contrast, the recent findings show small changes indicating a shift in focus towards helping businesses grow in specific ways, like making more profit and becoming more sustainable. Further changes in the 2023 survey highlight the importance of increasing awareness and collaboration, recognising communication gaps and promoting registration on certain databases.

11. Creative Wales Industry Survey Questionnaire

Creative Wales Industry Survey 2023

About the business

Q1 **Which of the following subsectors is your business/ are you currently active in?**

- Music ❑
- Screen ❑
- Digital (including Animation, Games, Immersive, Createch) ❑
- Publishing ❑

Q2 **In which local authority is your business/ are you 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 ❑
I am an employee of the company ❑
I am an employer/ director/ owner of the company ❑

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 structure of the business (e.g., sole proprietorship, partnership, corporation)?**

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

____

Q6a **Do not ask freelancers: In total, how many full-time equivalent employees and casual staff are employed by the business?**

Record value below ❑
Don't know *(do not read out)* ❑

Q6b **Please enter an approximate number below, if not known tick don't know above:**

____

Q6c **Please can you estimate the number of permanent employees and casual staff the business has?**

- 1-9 employees (Micro business) ❑
- 10-49 employees (Small business) ❑
- 50-249 employees (Medium-sized business) ❑
- 250 or more employees (Large business) ❑
- Don't know *(do not read out)* ❑

Q7a **We are interested in exploring the diversity of the creative workforce, so we're interested to find out how diverse the sectors are at leadership level in a bit more detail.**

How would you describe yourself?

- Man ❑
- Woman ❑
- Non-binary ❑
- Another ❑
- Prefer not to say ❑

Q7b **What is your ethnicity?**

- White ❑
- Asian, Asian Welsh or Asian British ❑
- Black, Black Welsh, Black British, Caribbean or African ❑
- Mixed or Multiple ethnic groups ❑
- Other ethnic group ❑
- Prefer not to say ❑

Other ethnic group (please specify)

____

Is that...?

White Welsh, English, Scottish, Northern Irish or British ❑
White Irish ❑
Gypsy or Irish Traveller ❑
Roma ❑
Other White ❑
Prefer not to say ❑

Other White (please specify)

____

Is that...?

Indian ❑
Bangladeshi ❑
Pakistani ❑
Chinese ❑
Any other Asian background ❑
Prefer not to say ❑

Other Asian background (please specify)

____

Is that...?

Caribbean ❑
African background ❑
Any other Black, Black British or Caribbean background ❑
Prefer not to say ❑

Other Black, Black British or Caribbean background (please specify)

____

Is that...?

White and Black Caribbean ❑
White and Asian ❑
White and Black African ❑
Any other mixed or multiple background ❑
Prefer not to say ❑

Other mixed or multiple background (please specify)

____

Is that...?

Arab ❑
Any other ethnic group ❑
Prefer not to say ❑

Other ethnic group (please specify)

____

Q7c **What is your nationality?**

Welsh ❑
English ❑
Scottish ❑
Northern Irish ❑
British or Irish ❑
Another ❑

Another (please specify)

____

Q7d **Are you disabled?**

Yes .... ❑
No .... ❑
Prefer not to say .... ❑

Do not ask freelancers:

Employment

Q8 **Do not ask freelancers/employees: In the last year, how many people did your business employ that are...?** *Please enter an approximate number where possible, if not known leave blank.*

Full-time staff	________________
Part-time staff	________________
Freelancers	________________
Apprentices	________________
Trainees	________________
Volunteers	________________

Turnover

Q9 **What are your business priorities for the upcoming financial year?** *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 ❑

Other (please specify)

____

Q10a **Compared to your last financial year, has your turnover increased or decreased?**

- Increased ❑
- Decreased ❑
- No change/ stayed the same ❑

Q10b **If increased or decreased: Compared to your last financial year, by how much has this** *{increased / decreased}***?**

- Less than 1% ❑
- 1-20% ❑
- 21-40% ❑
- 41-60% ❑
- 61-80% ❑
- 81-100% ❑

More than 100% ❑
Don’t know ❑

Q10c **If increased: What do you think contributed to this change?** *Please tick all that apply*

Increased business/ work available ❑
Increased public funding available ❑
Impacts from the Covid-19 pandemic ❑
Impacts from increasing cost of living ❑
Increased awareness of the business/ my work ❑
Increased consumers or participation in the sector I work ❑
Other ❑
Other (please specify)

____

Q10d **If decreased: What do you think contributed to this change?** *Please tick all that apply*

Decreased business/ work available ❑
Decreased public funding available ❑
Impacts from the Covid-19 pandemic ❑
Impacts from increasing cost of living ❑
Decreased awareness of the business/ my work ❑
Decreased consumers or participation in the sector I work ❑
Other ❑
Other (please specify)

____

Q11 **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 in the next financial year?**

1 – Not at all confident ❑
2 ❑
3 – Somewhat confident ❑
4 ❑
5 – Very confident ❑

Q12 **What sources of funding did you receive in your last financial year?** *Please tick all that apply*

Arts Council of Wales ❑
Business rates grants ❑
Council grants ❑
Creative Wales/ Welsh Government grants ❑
Self-employment grants ❑
I did not receive any funding ❑
Other ❑
Other (please specify)

____

Skills and recruitment

Q13 *For businesses:*

In the last 12 months, where have you recruited and how? *If they mention via a training scheme, ask which one. Please tick all that apply*

Freelance directory .... ❑
Online sources .... ❑
Through an agency .... ❑
Through HE/ FE channels .... ❑
Word of mouth .... ❑
Via a training scheme (please specify) .... ❑
Other .... ❑
Not applicable/ have not recruited .... ❑

Which training scheme? (please specify)

____

Other (please specify)

____

Q14 (music) *If yes, music*

What roles did you recruit for? *Please tick all that apply*

Sound Engineer .... ❑
Bar Staff .... ❑
Security/ Door Staff .... ❑
Merch Sales .... ❑
Cleaners .... ❑
Equipment Hire .... ❑
Vehicle Hire .... ❑
Lighting Engineers .... ❑

Electricians ❑
Ticketing ❑
Other ❑
Other (please specify)

____

Q14 (screen) *If yes, screen*

What roles did you recruit for? *Please tick all that apply*

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 ❑
Other (please specify)

____

Q14 (digital) *If yes, digital*

What roles did you recruit for? *Please tick all that apply*

- 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 ❑

Other (please specify)

____

Q14 (publishing) *If yes, publishing*

What roles did you recruit for? *Please tick all that apply*

- Publisher ❑
- Editor (including Assistant Editor/ Copy Editor/ Proofreader) ❑
- 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 ❑

Other (please specify)

____

Q14a *For businesses:*

Have you experienced difficulties with staff retention in the last 12 months?

Yes ❑
No ❑

Q14b *For freelancers:*

Have you experienced difficulties finding jobs for certain roles?

Yes ❑
No ❑

Q15a *For businesses:*

Have you faced challenges filling specific roles?

Yes ❑
No ❑

Q15b (music) *If yes, music*

Which roles have been challenging to fill? *Please tick all that apply*

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

Other (please specify)

____

Q15b (screen) *If yes, screen*

Which roles have been challenging to fill? *Please tick all that apply*

- 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 ❑

Other (please specify)

____

Q15b (digital)

If yes, digital

Which roles have been challenging to fill? *Please tick all that apply*

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 ❑

Other (please specify)

____

Q15b (publishing) *If yes, publishing*

Which roles have been challenging to fill? *Please tick all that apply*

- Publisher ❑
- Editor (including Assistant Editor/ Copy Editor/ Proofreader) ❑
- 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 ❑

Other (please specify)

____

Q15c *If Q15a = Yes:* **Why do you think this is?** *Please tick up to three answers*

- Competition from other companies ❑
- Financial stability ❑
- Job security ❑
- Lack of awareness and interest in the industry ❑
- Lack of FE/ HE courses available to obtain relevant qualifications ❑
- Lack of flexible working conditions ❑
- Lack of progression and development opportunities ❑
- Pay ❑
- People moving away from Wales for employment ❑
- Skills gaps in workforce/ applicants ❑
- The creative sector is not seen as credible employment ❑
- Wellbeing factors such as work/life balance ❑

Other ❑

Other (please specify)

____

Q15d *For freelancers:* **In the last 2 years, have you considered leaving your profession?**

Yes ❑

No ❑

Q16a *For businesses:* **Do you have any skills gaps in your workforce or foresee any in the next year?**

Yes ❑

No ❑

Q16b *For freelancers:* **Do you have specific professional development needs?**

Yes ❑

No ❑

Q16c *If yes:* **What are they?** *Please tick up to three answers*

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 ❑

Other (please specify)

____

Q17 *For businesses:* **Do you provide training and skills development for your staff?**

Yes ❑
No ❑

Creative Wales

Q18 **Have you heard of Creative Wales?**

Yes ❑
No ❑

If no at Q18, read out: **Creative Wales are a Welsh Government agency set up in 2020 to support the creative industries in Wales. They harness the power of the creative sectors, drive growth in the economy and help build a prosperous future for Wales.**

Q19 **How can Creative Wales support you in the future?** *Please tick all that apply*

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

Other (please specify)

___

Q20 *If yes at Q18:* **Using a scale of 1 to 5, where 1 is not very well and 5 is very well, how well do you think Creative Wales communicates what it does and how it can help you?**

1 – Not very well ❑
2 ❑
3 ❑
4 ❑
5 – Very well ❑

Other channels

Q21 **How would you prefer to receive news and information about what Creative Wales does and how it can support you?** *Please tick all that apply*

Email ❑
Telephone ❑
Social media ❑
Post ❑
Other ❑

Other (please specify)

____

Q22 **Which social media channels do you rely on for business purposes?** *Please tick all that apply*

LinkedIn ❑
Facebook ❑
X (Previously Twitter) ❑
Instagram ❑
Pinterest ❑
YouTube ❑
TikTok ❑
WhatsApp ❑

Tumblr ❑
Yelp ❑
Snapchat ❑
Other ❑

Other (please specify)

____

Q23a *For businesses:* **Are you registered on the Production Facility Database?**

*To register as a company on the Wales Screen **Production Supplier** database*

Yes ❑
No ❑

Q23b *For freelancers:* **Are you registered on the Wales Screen Database?**

*To register on the Wales Screen **Freelance Crew** database (previous professional experience of working in Film/ TV is required)*

Yes ❑
No ❑

Welsh language

Q24 **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 ❑