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Examining the Impact of Creative Wales Funded Productions

Executive Summary

1. Research aims and methodology

- 1.1 Between 2020/21 and 2024/25, £23.7 million in funding was awarded to 45 screen and digital projects within the scope of this study, supporting scripted, unscripted, animation, and games content. This investment is estimated to have leveraged £263.9 million of production expenditure in Wales (all figures in 2024/25 prices). This equates to approximately £11.15 in estimated production spend in Wales for every £1 of Creative Wales funding.
- 1.2 While the full scale of production activity reported by the 45 funded projects in scope cannot be solely attributed to Creative Wales funding, many production leads consulted as part of this study reported that Creative Wales investment had enabled or accelerated their projects.
- 1.3 This evaluation adopts a theory-based and mixed-methods approach, combining economic modelling with stakeholder consultations with 31 individuals and secondary data review. A bespoke economic value framework was developed to capture the direct, indirect, and induced impacts of Creative Wales' Production Funding, including supply chain effects, workforce development, infrastructure spillovers, and screen-induced tourism.
- 1.4 Input-Output modelling was used to quantify economic impacts using the newly published 2019 Input-Output tables for Wales, marking one of the first applications of these tables in the screen sector. The approach aligns with HM Treasury's Green Book and accepted industry practice. Still, estimates are necessarily conservative due to limitations in the availability and granularity of monitoring data (e.g. lack of freelancer headcount, partial spend breakdowns, and incomplete geographic data). The findings should therefore be interpreted as a robust but cautious estimate of value generated by Creative Wales-supported productions.

2. Key findings - Economic impact and supply chain reach

- 2.1 Creative Wales' Production Funding during the period in scope of the study has delivered significant economic returns. Total production expenditure is estimated to generate £159.9 million in direct and indirect GVA and support 2,650 FTE jobs across Wales, rising to £177.8 million in GVA and 2,835 FTEs when induced impacts are included. This report's results imply:
- For every £1 of Creative Wales' production funding, this generated £6.76 in direct and indirect GVA¹;
 - The total direct GVA contribution from production spend of £103.5 million is approximately 26% of the total output of Wales' Film, TV, Video, Radio, and Photography sector in 2023²;
 - The total GVA contribution of £177.8 million is equivalent to 0.2% of total GVA in Wales in the latest available data for 2023³; and
 - The 1,780 direct FTE jobs supported equate to an average of 350 FTE jobs per annum, representing around 2% of total employment in Wales' digital and screen sector in 2023⁴.
- 2.2 The breakdown of direct production spend further shows the breadth of value generated by production spend. Unsurprisingly, the industry accounting for the greatest share (62%) of direct production spend is motion picture, video and television programme production, with £177.23 million in realised and forecasted spend.
- 2.3 These impacts are not limited to the screen and digital sector itself; analysis of production spend confirms a wide distribution of benefits across the foundational economy, particularly in accommodation, construction, logistics, and transport. This supports Welsh Government objectives to retain economic value locally, as outlined in Prosperity for All: Economic Action Plan and the Programme for Government 2021–2026.

Findings by production type

- 2.4 By production type, inward investment projects accounted for the largest share of total spend and generated approximately £7.18 in GVA per £1 of Creative Wales funding. Indigenous productions, while smaller in financial scale, delivered strong returns of £6.08

¹ While this figure may appear modest compared to similar impact assessments in other UK nations, it reflects the specific characteristics of the Welsh screen economy and the methodological choices made in this evaluation. In particular, the Welsh Government's new 2019 Input-Output Tables published in 2025 and used for this modelling, suggest that the film and TV industry in Wales generates substantially lower GVA for every £1 of spend. This is due to higher levels of leakage and lower profit margins within Wales' film and TV industry. However, the modelling also reveals strong supply chain linkages, demonstrating that Welsh-based productions generate significant value across a broad range of sectors.

² [DCMS Sectors Economic Estimates: Regional GVA 2023 - GOV.UK](#)

³ [Stats Wales Gross Valued added by area and component](#)

⁴ Welsh Government, ['Welsh Creative Industry Sector Economic and Labour Market Statistics, 2018 to 2023'](#), 29 October 2024

per £1 and supported higher levels of local employment, reflecting their role in building a sustainable domestic sector.

- 2.5 Scripted content was the primary driver of economic impact, generating over 95% of total GVA and employment supported. However, unscripted, animation, and games projects also delivered competitive returns relative to their size, contributing to sector diversity and creative innovation.
- 2.6 Recommissioned series delivered a marginally lower GVA per £1 than single-series projects (£6.63 per £1 to £6.75 per £1, respectively) but played an important role in supporting employment continuity and maturing intellectual property.
- 2.7 Welsh-language productions represented one in five funded projects and generated £5.47 in GVA per £1 of investment. While smaller in scale, these projects are critical to promoting cultural and linguistic sustainability and directly contribute to the goals of Cymraeg 2050.

Spillover benefits

- 2.8 Beyond the direct impacts of production spend on the Welsh economy, the programme's value extends through a range of spillover effects. Most notably, screen-induced tourism has emerged as a major channel of secondary economic contribution. This report's illustrative modelling suggests tourism linked to Creative Wales-supported productions could contribute between £45.3 million and £226.4 million in GVA and support between 1,110 and 5,570 years of employment or just under 1,400 jobs. This aligns with Welcome to Wales: Priorities for the Visitor Economy 2020–2025 and demonstrates the value of screen content in supporting place-branding and destination marketing.
- 2.9 Other spillovers include indirect contributions from studio development, cinema exhibition, film festivals, skills, education and outreach activity, as well as public-facing cultural events such as the Iris Prize and Wales Screen Summit.

3. Key findings - Wider effects of Creative Wales-funded productions

Workforce development and progression pathways

- 3.1 The programme has also provided a strong platform for workforce development and progression. More than 425 trainees were supported through funded productions (within the scope of the study, this figure rises to 500 when considering the full Creative Wales portfolio to date). Many participants were able to build professional networks and gain repeat experience, supporting progression into more senior roles within the industry. This is consistent with objectives in More Than a Job, the Welsh Government's employability plan; the Young Person's Guarantee; the Welsh Government's Programme objective to increase apprenticeships and advance commitments within the Employability and Skills Plan; and the Creative Skills Action Plan to widen access and diversify the creative industries workforce.

Industrial development and sector resilience

- 3.2 In terms of industrial development, several production companies reported expanding their in-house capabilities, retaining intellectual property, or scaling up operations as a result of support from Creative Wales. This has strengthened the capacity and resilience of the

domestic screen sector, improving Welsh companies' ability to compete globally and attract inward investment. These effects support the Welsh Government's Wales Innovates: Creating a Stronger, Fairer, Greener Wales strategy and the ambition to grow high-value sectors with export potential.

Cultural and linguistic impact

- 3.3 Between 2020/21 and 2024/25, Creative Wales has allocated £2.0 million across 10 Welsh-language productions, representing approximately 8% of total production funding and equivalent to more than one in five of those in scope. This investment contributes to greater visibility of the Welsh language and contemporary Welsh identity on screen, while also supporting Welsh-speaking crew and supplies. This reflects the programme's commitment to promoting cultural diversity and is aligned with Cymraeg 2050, supporting the Welsh Government's policy objective of reaching one million Welsh speakers by 2050.

Social inclusion and community engagement

- 3.4 Many productions also promoted wider social value. A number specifically sought to improve representation through inclusive recruitment, diverse casting, and storytelling grounded in Welsh communities. Others engaged local residents through consultation, location filming, or outreach work. These contributions supported local pride, cohesion, and cultural participation.

Environmental performance

- 3.5 Environmental sustainability has also been a visible feature of delivery. Every production lead consulted as part of this research was working on productions that had received Albert certification, and most reported implementing greener production practices, such as low-carbon transport, digital set documentation, and the use of sustainability coordinators. These practices reflect a growing maturity in the sector's climate response and contribute to Wales' legally binding emissions reduction targets under the Environment (Wales) Act 2016. The average carbon intensity per £1 million of production spend stood at approximately 116 tonnes of CO₂e, 17% lower than the carbon assessment of Scotland's 2025-2026 budget (140 tonnes of carbon per million of spending)⁵.

4. Context review

- 4.1 The context in which this funding was delivered was marked by a series of structural and geopolitical shifts that transformed the operating landscape for screen production, affecting Creative Wales and funded production outcomes. Britain's exit from the European Union introduced uncertainty around talent mobility, co-productions, and access to funding. The COVID-19 pandemic led to severe disruptions across supply chains, production timelines, and audience behaviours, creating lasting change in working practices and accelerating digital distribution. Meanwhile, growing reliance on global streaming platforms reshaped content commissioning, with increased competition for visibility and IP ownership. Industrial action in the US (e.g., the WGA and SAG-AFTRA strikes) further underlined the volatility of

⁵ [Scottish Budget 2025 to 2026: Carbon assessment](#)

the international market. Against this backdrop, the programme's ability to sustain production, retain talent, and support local content development underscores the importance of public investment.

5. Conclusion

- 5.1 In summary, Creative Wales' Production Funding has generated important and multi-dimensional public value. It has strengthened Wales' economic base, upskilled the workforce, enhanced cultural and linguistic representation, and raised Wales' international profile as a place to live, work, and create. These impacts demonstrate how targeted public investment in screen content can advance a wide range of government priorities, from inclusive economic growth to Welsh language normalisation and environmental sustainability.

Examining the impact of the Creative Wales Funded Productions

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Social and economic research
Ymchwil cymdeithasol ac economaidd

Between 2020 and 2025
Creative Wales awarded...

£23.7m

in funding to

45

screen and digital projects

This investment is expected to
leverage

£263.9m

of production expenditure in
Wales
(2024/25 prices)



This equates to approximately

£11.15

in estimated production
spend in Wales for every

£1

of Creative Wales funding

When including induced impacts, total production expenditure is estimated to generate...

Every

£1

of Creative Wales
production
funding generated

£6.76

in direct and indirect GVA



2,835

In full time equivalent jobs
in Wales



£177.8m

In Gross Value Added (GVA) in
Wales

The total direct GVA
contribution of production is...



of the total output of Wales's
'Film, TV, Radio, and
Photography' sector in 2023

Screen-induced tourism linked to Creative
Wales-supported productions could
contribute up to...

£226.4m in GVA

and support up to...

1,400 full time equivalent jobs

Wider effects of
Creative Wales's
Funded Productions
includes...

Workforce & Progression Pathways
more than



425

trainees were supported through
funded productions

Cultural & Linguistic Impacts
investing



£2m

across 10 Welsh-language
productions aligning with Cymraeg 2050

Industrial Development & Sector
Resilience



Production companies
reported having:

- Expanded in-house capabilities
- Scaled-up operations
- Retained intellectual property

Environmental Sustainability



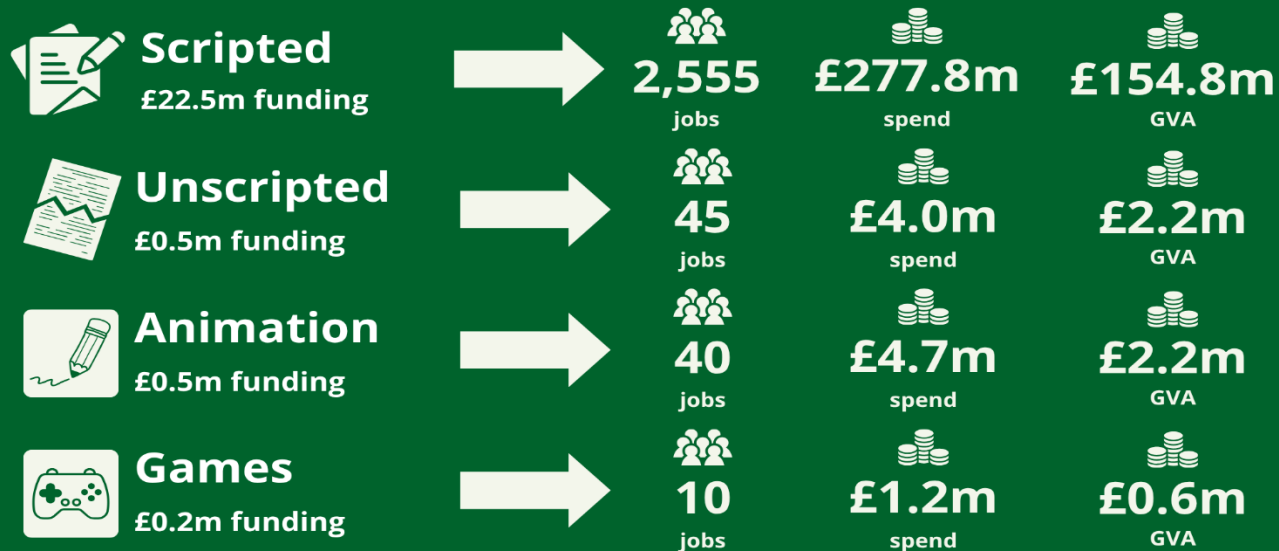
Creative Wales-
supported projects
have a lower-than
average carbon
emissions intensity

Social Inclusion & Community
Engagement

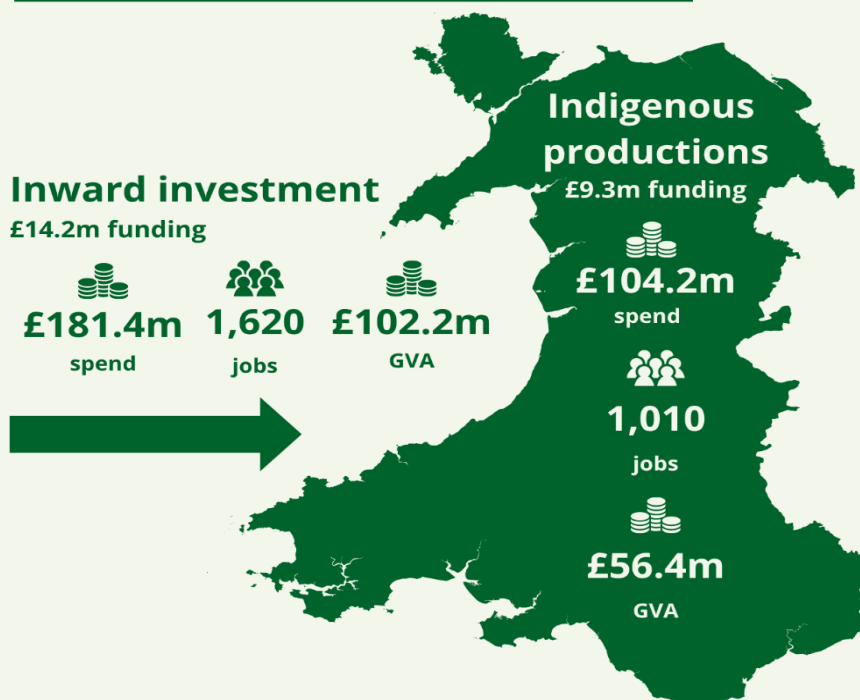


- Inclusive recruitment
- Diverse casting
- Storytelling grounded in Welsh communities

When broken down by Genre:



Looking at production type:



Welsh language productions

£2.0m funding



Every **£1** of Creative Wales production funding Generated **£10.40** spend and **£5.47** GVA

Above-the-line vs Below-the-line:

94%

of spend was Below-the-line (crew, technical, operational)

£151.5m direct and indirect GVA **2,520 jobs**

6%

of spend was Above-the-line (writers, directors, principal cast)

£8.4m direct and indirect GVA **130 jobs**

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Ymchwil cymdeithasol ac economaidd

Full Research Report: Pang, M, Gallagher, P, Dennis, G, Maher, R, Merali-Younger, S, Marsh, R and Fleming, T (2025). *Examining the Impact of Creative Wales Production Funding*. Cardiff: Welsh Government, GSR report number 115/2025

Available at: <https://www.gov.wales/examining-impact-creative-wales-funded-productions>

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

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.
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