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Examining the Impact of Creative Wales Production Funding



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Examining the Impact of Creative Wales Production Funding

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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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Glossary

Above-the-Line (ATL): Costs associated with senior creative roles such as writers, directors, producers, and principal cast.

Below-the-Line (BTL): Expenditure related to technical, operational, and logistical elements of production delivery, including crew, equipment, and services.

Crew: Individuals involved in the technical and operational aspects of production, such as camera, sound, set design, and production support.

Direct Impact: Economic effects generated directly by production activity, such as jobs and spending within the funded production itself.

Economic Contract: A Welsh Government agreement outlining commitments to economic strength, fair work, well-being, and low-carbon/climate resilience.

Full-Time Equivalent (FTE): a metric used to calculate the number of full-time employees if all employees worked full-time within a given context.

Gross Value Added (GVA): A measure of the value of goods and services produced in an area, industry, or sector of an economy.

Induced Impact: Economic effects resulting from household spending by those employed directly or indirectly through production activity.

Indirect Impact: Economic effects generated through the supply chain, such as spending by suppliers to the production.

Input-Output (I-O) Table: An economic model showing how different sectors of the economy interact, used to estimate the wider impact of production spending.

Inward Investment: Funding or production activity brought into Wales from outside, often by international or UK-based companies.

Intellectual Property (IP): Legal rights that result from intellectual activity in the industrial, scientific, literary, and artistic fields, such as scripts or formats.

Match Funding: Additional funding provided by sources other than Creative Wales, often required as a condition of receiving public funding.

Monitoring Data: Information collected from funded productions and the Welsh Government to track spending, employment, and other outcomes.

Production Funding: Financial support provided to help develop and deliver screen and digital content.

Recommissioned Series: A production that has been renewed for additional seasons or episodes beyond its initial run.

Scripted/Unscripted: Scripted refers to productions with a written script (e.g., drama, comedy); unscripted refers to factual or reality content.

Spillover Effects: Secondary benefits indirectly stimulated by production outputs, such as increased tourism or skills development.

1. Introduction and background

Launched in January 2020, Creative Wales is committed to nurturing a more inclusive, sustainable and prosperous creative industries¹. Sitting within the Welsh Government, Creative Wales seeks to drive sector growth, cultivate a world-class skills base, extend support to various segments of the industry, and position Wales as an ideal destination and hub for establishing creative businesses, as reflected in its priorities². Creative Wales supports the industry through:

- **Funding** – investing in businesses to help develop their projects and support the growth of Wales' creative industries. Funding includes the Creative Wales Development Fund (in content-based IP), Production Funding (the focus of this study), other sector and genre-specific funds (e.g. music, film and young content), and innovation support via programmes such as Media Cymru.
- **Skills and talent** – facilitating collaboration (e.g., across Welsh Government, businesses, higher education institutions, education, training providers and broadcasters) and providing funding for training opportunities and upskilling programmes (through the Creative Skills Fund).
- **Support and guidance** – advise and work with creative industry stakeholders and projects to further their development, including connecting individuals and businesses, signposting to specialist services and providing advice and guidance (e.g. through its Wales Screen service)

1.1. Programme overview

Creative Wales Production Funding is an investment mechanism supporting the growth and delivery of screen and digital content for international audiences. The fund is open to indigenous and inward investment companies for projects across scripted, unscripted, animation, and games genres. It is intended to increase the number, variety, and ambition of productions made in Wales.

The programme is designed to generate a broad range of economic, cultural, social and environmental benefits, including upskilling the workforce, creating employment, strengthening local supply chains, and enhancing Wales' global screen presence.

Between 2020/21 and the beginning of 2025, Creative Wales supported 47 screen and digital projects. Of these, 45 were in scope for this study and received a total of £23.7 million in Creative Wales funding³ (all figures in this report are presented in 2024/25 prices), including:

- Scripted: 30 productions, receiving £22.5 million

¹ [Creative Wales Policy and Research](#)

² [Priorities for the Creative Industries Sector in Wales](#)

³ All spend/funding figures have been inflated to 2024/25 prices using HM Treasury GDP Deflators (March 2025).

- Unscripted: 10 productions, receiving £520,000
- Animation: 4 productions, receiving £543,000
- Games: 1 production, receiving £150,000

1.2. Purpose of research

In September 2024, the Welsh Government commissioned Wavehill, alongside sub-consultants 4-consulting and Tom Fleming Creative Consultancy, to undertake an assessment of the impact of Creatives Wales' Funded Productions, as part of its Production Funding programme, specifically to:

- develop an overarching framework for assessing the range of impacts from funding productions in Wales;
- provide evidence to inform future actions and decisions on funding to the sector; and
- explore the wider impacts to identify and capture the programme's and funded productions' benefits and to understand how these contribute to the Welsh Government's broader policy goals.

1.2.1. Report structure

Chapter 2: Methodology – outlines the research design, data sources, analytical framework, and limitations of the study;

Chapter 3: Economic value of Creative Wales-funded productions – presents the findings of the economic modelling, including direct, indirect, and induced impacts, with further analysis by production characteristic;

Chapter 4: Wider spillover effects – explores the additional value generated by the programme, including tourism, education, skills, infrastructure, and cultural outcomes;

Chapter 5: Wider economic effects of Creative Wales-funded productions – provides qualitative analysis of non-quantifiable economic contributions made by funded productions;

Chapter 6: Wider social and cultural effects of Creative Wales-funded productions – examines funded productions' contributions to representation, community engagement, the Welsh language, and diversity both on- and off-screen;

Chapter 7: Case studies – presents four in-depth case studies that illustrate the varied impact of Creative Wales funding across different production types and scales; and

Chapter 8: Context review – summarises the wider socioeconomic and industry context to situate the findings from the assessment.

2. Methodology

This chapter sets out the methods and research activities undertaken in the assessment.

2.1. Overview

The assessment is based on a theory-based evaluation approach, underpinned by a well-defined Theory of Change (ToC) for the Creative Wales Production Funding Programme, as presented in Appendix B. This conceptual framework outlines the expected pathways through which programme activities are anticipated to generate economic, social, cultural, and environmental impacts in Wales.

The theory-based approach has been operationalised through a mixed-methods design that combines quantitative and qualitative evidence to test the underlying assumptions and causal mechanisms. Specifically, the assessment draws on:

- Monitoring and management data provided by Creative Wales;
- Desk-based literature and policy review, including relevant evaluations and sector analyses;
- Semi-structured interviews with key stakeholders, including Creative Wales staff, production companies, crew, and wider sector representatives.

This triangulation of multiple evidence sources strengthens the robustness of the findings, allowing for a comprehensive analysis of both measurable economic outcomes and broader qualitative impacts.

In addition, Input-Output (I-O) modelling has been used to estimate the economic contribution of production activity to the Welsh economy. This quantifies the direct, indirect, and induced gross value added (GVA), employment, and tax effects arising from production spend, as detailed further in Chapter 4.

The research benefited from the Welsh Government's recent publication of Supply-Use and I-O tables in March 2025. The core macroeconomic impact model used in this research is based on the published I-O table. The I-O model offers a flexible approach that can capture macroeconomic impacts on GVA, income, output (turnover), and employment.

Since the completion of the core analysis for this study, the Welsh Government has also published [indicative economic multipliers](#) derived from the same 2019 tables, including GVA, output and employment multipliers across key sectors⁴. The modelling approach used in this research is broadly consistent with the methodology used to develop these official multipliers. However, there may be small differences in the employment effects presented due to variations in how employment is estimated. This study used employment data derived directly from the Office for National Statistics Business Register and Employment Survey (BRES). In contrast, the Welsh Government's published multipliers draw on a

⁴ [Indicative economic multipliers \(input-output tables\): 2019 | GOV.WALES](#)

combination of BRES and Labour Force Survey data to account for total workforce estimates.

For more details on the methodology used as part of this study, please see Appendix C.

2.2. Methodology for this assessment

This assessment adopts an economic value framework that recognises the range of pathways through which Creative Wales-supported productions generate impact, including direct spend, supply chain effects, studio and infrastructure investment, screen-induced tourism, and skills development. The scope of the quantitative assessment was determined by the strength of the data, its attribution to Creative Wales funding, and alignment with the HM Treasury Green Book and accepted industry standards. Several potential value areas, including marketing, distribution, company profits, and merchandising, were excluded from modelling due to data limitations or weak attribution. However, these are discussed qualitatively where relevant. This ensures the estimates presented are conservative, evidence-led, and robust. A full description of the framework, scope and exclusions is provided in Appendix C.

2.3. Methodological limitations

While this assessment applies a robust and proportionate mixed-methods approach, it is important to acknowledge the methodological limitations that may influence the interpretation of findings:

- **Data availability and completeness** - the economic modelling presented in this report is based on a combination of realised spend (from final claims submitted by completed projects) and forecasted spend (for projects still in delivery at the time of assessment or those that have been delivered but did not provide detailed spend data). While most productions submitted sufficiently detailed data to enable analysis, inconsistencies in the granularity and structure of reporting across projects persisted. In some cases, only headline figures were provided without full disaggregation by spend category (e.g., crew, non-crew, or industry codes), limiting the accuracy of detailed breakdowns. Where data gaps existed, proxy assumptions were applied using benchmarks from comparable productions with a more complete explanation of the data.

Crucially, data submitted through claim forms did not reliably distinguish between salaried employees and freelance contractors, nor did it consistently report the number of individuals employed. As such, it was not possible to determine the total number of freelancers or overall headcount supported by Creative Wales-funded productions. Instead, the economic modelling relies on full-time equivalent (FTE) job estimates, derived from modelling assumptions that convert total expenditure into equivalent job-years. These figures reflect the average employment volume required to support the observed level of spend, rather than a count of individuals engaged.

Additionally, the absence of detailed geographic data, such as vendor postcodes or location-specific spend, meant that it was not feasible to undertake sub-national

analysis of economic impacts by region or local authority. Spatial analysis was limited to two of the four case studies presented in Chapter 7, where some location data was available. This analysis should be interpreted as indicative rather than comprehensive.

- **Attribution and additionality** - the report estimates gross economic impacts, the total value of activity associated with Creative Wales funding. However, no formal counterfactual has been modelled, and the analysis does not account for deadweight, displacement, or leakage. While qualitative evidence from consultations supports the case that Creative Wales funding was critical to enabling many productions to proceed, caution should be applied when attributing all observed impacts solely to the intervention.
- **Limited data on specific downstream activities** - this study does not quantify economic impacts associated with the marketing, broadcasting, international distribution of productions, or increased business income. Similarly, while there is qualitative and anecdotal evidence of wider spillover effects (e.g., merchandising and brand visibility), these could not be included in the quantitative analysis. As a result, the economic estimates presented should be viewed as conservative and focused solely on the production and immediate supply chain phases.

3. Economic value of Creative Wales-funded productions

This chapter assesses the economic impact generated by screen productions within Wales, supported by Creative Wales and associated match funding leveraged. It considers both the direct contributions of funded productions and the wider benefits realised through local supply chains and associated household income expenditure to the Welsh economy.

3.1. Production development

Creative Wales' production funding supports the creation and delivery of screen and games content, allocating resources specifically to the production phase. Funding from Creative Wales was described as playing a direct, and often pivotal, role in ensuring the commercial viability of screen productions. Several consultees (n=7) noted that many of these productions would not have proceeded without Creative Wales' financial support. In some cases, the funding enabled productions to be brought forward more quickly than would otherwise have been possible, or to conduct production activity within and across Wales. Creative Wales investment has also provided confidence to other investors, helped de-risk projects, and unlocked additional match funding.

During the application process, production companies are evaluated on their anticipated local expenditure in Wales, incentivising procurement from Welsh suppliers and promoting economic value within local supply chains.

It is important to note that this analysis captures only production-related expenditures. Although additional downstream investments are typically made in promotion, marketing, and broadcasting, these elements are not reflected within the current assessment. The primary reason for this omission is that monitoring data provided by projects focused solely on production spend. Downstream expenditure data was challenging to acquire from individual projects and was often held by external organisations or stakeholders.

3.1.1. Overview of production development and supply chain expenditure

Across the 45 projects analysed, Creative Wales committed £23.7 million in production funding, leveraging an estimated £263.9 million of production expenditure within Wales. This means every £1 of Creative Wales funding generated £11.15 in production spend in Wales⁵. Overall, funded projects directly contributed £287.6 million in spend within Wales, of which:

- £231.5 million has been verified through final claims from completed projects; and
- £56.0 million is forecasted expenditure from projects currently in delivery or yet to submit their final claims.

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

⁵ This figure was calculated by dividing the total production expenditure reported committed by match funders (excluding Creative Wales funding) by the value of Creative Wales production funding committed. All values have been adjusted to 2024/25 prices.

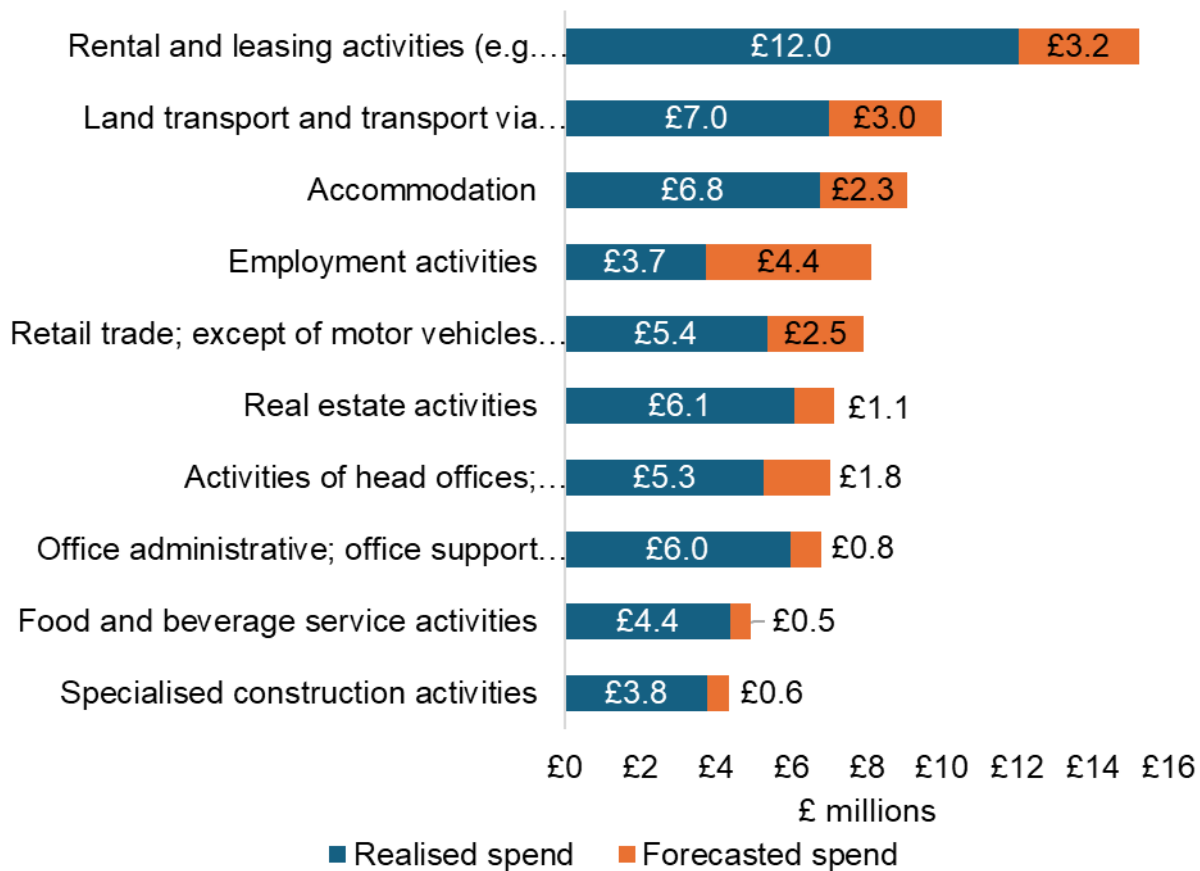
direct production spend is motion picture, video and television programme production, with £177.23 million in realised and forecasted spend. The next ten largest industries are shown in Figure 4.1 below.

Production companies supported by Creative Wales procured a diverse array of goods and services from within Wales, spanning both creative and non-creative sectors, including the foundation economy, in support of the Welsh Government's commitment to its Economic resilience and reconstruction mission⁶. This included, but was not limited to:

- **Creative services:** freelance crew, technical specialists, post-production editing, sound mixing, and visual effects (VFX);
- **Operational and logistical services:** location hire and equipment rental; and
- **Professional and ancillary services:** insurance, legal and financial services, security, and administrative support.
- **Foundation economy:** catering and transportation.

⁶ [Welsh Government Economic resilience and reconstruction mission](#)

Figure 3.1: Realised and forecasted spend by 2-digit SIC industry (excluding motion picture, video and television programme production)



Source: Monitoring information

This varied pattern of procurement highlights the extensive reach of the screen and digital sector across the broader Welsh economy. Notably, spending was not confined to the creative industries but extended to general service sectors, reinforcing the cross-sectoral economic value of production activity that can be initiated with public funding.

3.1.2. Economic value of production development and supply chain expenditure

The total of £287.6 million in direct production expenditure, of which £125.6 million has been spent in lower-tier supply chains (indirect), is estimated to have made a substantial contribution to the Welsh economy. Headline impacts include:

- **Gross value added:** based solely on verified (realised) spend, the programme is estimated to have generated £127.8 million in GVA for Wales. When forecasted spend from projects still in delivery is included, the total GVA impact rises to £159.9 million; and

- **Employment impact:** it is estimated that production spend has supported approximately 2,270 FTE jobs in Wales based on realised spend. Including forecasted spend, the estimated total employment impact rises to 2,650 FTE jobs.

3.1.3. Income effects and induced economic contribution

In addition to business-to-business procurement, Creative Wales-funded productions generate significant household income through direct payments to cast, crew, and production staff, as well as indirectly to employees along its supply chain. These earnings are subsequently substantially, but not entirely, re-spent across the wider economy, giving rise to induced effects. This is when household consumption supports further economic activity, particularly in sectors such as housing, retail, food services, and local transportation. The total effect of this induced spend is estimated to generate approximately £18.0 million in GVA and support around 190 FTE jobs.

3.2. Total economic value

Between 2020/21 and 2024/25, Creative Wales allocated £23.7 million in production funding, which is estimated to have leveraged £287.6 million in total spend.

As a result, the programme is estimated to have contributed £177.8 million to the Welsh economy's GVA and to have supported approximately 2,835 FTE jobs over the five years. A breakdown of economic impact by effect type is presented in Table 3.1.

Table 3.1: Total economic value

Type of Impact	GVA	FTE Jobs
Realised		
Direct	£81.9 million	1,510
Indirect	£46.0 million	770
Induced	£14.2 million	150
Forecasted		
Direct	£21.7 million	270
Indirect	£10.4 million	110
Induced	£3.7 million	40
Total	£177.8 m	2,840

Source: Wavehill Analysis (2025). Please note that financial figures have been rounded to the nearest £100,000, and FTE jobs have been rounded to the nearest 10; therefore, the sum of individual figures may not tally with the totals presented.

These figures suggest that Creative Wales production funding has delivered significant value across multiple dimensions:

- For every £1 of Creative Wales production funding, this generated £6.76 in direct and indirect GVA⁷;

⁷ While this figure may appear modest, it reflects the specific characteristics of the Welsh screen economy and the methodological choices made in this evaluation. The figures are due to high levels of leakage and low

- The total direct GVA contribution of £103.5 million is approximately 26% of the total output of Wales' Film, Television (TV), Video, Radio, and Photography sector in 2023⁸;
- The total GVA contribution of £177.8 million is equivalent to 0.2% of total GVA in Wales in 2023⁹;
- 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 2023¹⁰; and
- For every direct job supported by the programme, an additional 0.6 FTE jobs were supported through the supply chain and induced effects.

3.3. Tax implications

The economic impact activity associated with Creative Wales' production funding is estimated to contribute £30.0 million in tax revenues on product (value added tax - VAT) and income tax. Due to data limitations, corporation tax, national insurance, and other indirect taxes have not been estimated, so the figures presented are conservative.

When including additional tax revenues derived from induced household income expenditure (i.e. spending by employees supported by the programme), the total fiscal contribution increases to an estimated £30.6 million. This implies that every £1 of Creative Wales funding returned around £1.29 to the Exchequer. This does not include additional fiscal contributions such as VAT from increased consumption or long-term tax contributions from enhanced career progression.

3.4. Analysis by production characteristics

To better understand the profile of the direct and supply chain effects resulting from production spend, an analysis has been conducted on production characteristics:

3.4.1. Analysis by type of production

Across the 45 projects analysed, Creative Wales awarded £9.3 million to 24 indigenous productions, £14.2 million to 20 inward investment productions, and £155,000 to one co-production. Focusing on direct and supply chain (indirect) impacts only, the analysis reveals notable differences in the scale and return on investment by production type:

profit margins within the film and TV industry in Wales. However, the modelling also reveals strong supply chain linkages, demonstrating that Welsh-based productions generate significant value across a broad range of sectors.

⁸ [DCMS Sectors Economic Estimates: Regional GVA 2023 - GOV.UK](#)

⁹ [Stats Wales Gross Value Added by area and component](#)

¹⁰ Welsh Government, '[Welsh Creative Industry Sector Economic and Labour Market Statistics, 2018 to 2023](#)', 29 October 2024

- Inward investment productions accounted for the largest share of total spend, with approximately £181.4 million in direct production development expenditure. These projects generated £102.2 million in GVA, equating to £12.74 in spend and £7.18 in GVA per £1 of Creative Wales funding. They supported an estimated 1,620 FTE jobs, at an average cost of £8,800 of public funding per job.
- Indigenous productions, while smaller in overall scale, delivered strong economic returns relative to the funding invested. With a total spend of approximately £104.2 million, they generated £56.4 million in GVA, equating to £11.24 in spend and £6.08 in GVA per £1 of Creative Wales funding. These productions supported 1,090 FTE jobs, at £9,210 per job.

Table 3.2: Economic impact and return on investment by type of production

Type of Impact	Indigenous	Inward Investment
Creative Wales production funding	£9.3 million	£14.2 million
Number of projects	24	20
Total direct production spend	£104.2 million	£181.4 million
Production spend per £1 of Creative Wales Funding	£11.24	£12.74
Total GVA	£56.4 million	£102.2 million
GVA per £1 of Creative Wales funding	£6.08	£7.18
FTE jobs	1,010	1,620
Cost per FTE job	£9,210	£8,800

Source: Wavehill Analysis. Please note that financial figures have been rounded to the nearest £100,000 and FTE jobs have been rounded to the nearest 10.

Note: GVA and FTE figures presented only include direct and indirect impacts¹¹

These findings highlight the value of a balanced funding strategy. Inward investment delivers scale and international exposure, while indigenous and co-produced projects deliver against the strategic objective to develop a more sustainable and resilient locally rooted screen and digital sector.

¹¹ Direct: Jobs created within funded productions (e.g. cast, crew, production staff) and among first-tier suppliers directly contracted (e.g. equipment hire, set construction, catering).

Indirect: Jobs in the wider supply chain (i.e. second-tier suppliers), such as manufacturing, transport, or professional services that support first-tier suppliers.

3.4.2. Analysis by genre

To further explore the nature of economic activity supported through Creative Wales' production funding, outputs were analysed by production format: scripted, unscripted, animation, and games. This analysis focuses on direct and supply chain (indirect) effects and provides insight into both scale and return on investment:

Scripted projects accounted for the majority of overall economic activity, generating £277.8m in total direct production spend and £154.8 m in total GVA. This equates to £12.37 in spend and £6.89 in GVA per £1 of Creative Wales funding, the highest return on investment across all genres. Scripted projects supported approximately 2,560 FTE jobs, implying a cost of £8,790 per FTE job created, which is the lowest among all other production genres. The data underscore the strategic importance of scripted formats as a primary driver of sectoral GVA and employment in Wales, as well as the cultural value of telling local or Welsh-influenced stories.

Unscripted productions delivered strong returns relative to their scale. With a total spend of £2.2 million, this generated £2.2 million in GVA, equivalent to £7.70 in spend and £4.24 in GVA per £1 of funding. These projects also supported 44 FTE jobs, resulting in a per-job funding cost of approximately £11,818. This suggests that while smaller in financial scale, unscripted content contributes to economic diversification and supports steady employment, particularly among small and medium-sized enterprises (SMEs).

Animation productions generated £2.2 million in GVA, equating to £8.62 in spend and £4.07 in GVA per £1 of funding and a cost of £13,846 per job created. The data indicate that animation offers good value in terms of output per pound, particularly given its links to highly skilled, design-intensive work in the creative supply chain.

The sole games production in the portfolio is estimated to generate £1.2 million in combined spend and £650,000 in GVA, equating to £4.32 in GVA per £1 of Creative Wales investment. It is further estimated to support 13 FTE jobs for £12,750 per job created. As a developing format, games appear to offer promising returns for relatively low investment, with future potential contingent on sector growth and continued targeted support.

Table 3.3: Economic impact and return on investment by production genre

Type of Impact	Scripted	Unscripted	Animation	Games
Creative Wales production funding	£22.5 million	£0.5 million	£0.5 million	£0.2 million
Number of projects	30	10	4	1
Total direct production spend	£277.8 million	£4.0 million	£4.7 million	£1.2 million
Production spend per £1 of Creative Wales Funding	£12.37	£7.70	£8.62	£7.78
Total GVA	£154.8 million	£2.2 million	£2.2 million	£0.6 million
GVA per £1 of Creative Wales funding	£6.89	£4.24	£4.07	£4.32
FTE Jobs	2,555	44	39	12
Cost per FTE job	£8,790	£11,950	£13,870	£12,750

Source: Wavehill Analysis. Please note that financial figures have been rounded to the nearest £100,000 and Jobs have been rounded to the nearest 10.

Note: GVA and FTE figures presented only include direct and indirect impacts

Overall, scripted content underpins the majority of economic impact associated with Creative Wales' production funding, reflecting both its financial scale and labour intensity. This is consistent with the programme's VfM expectations, which typically require a minimum 10:1 ratio of Welsh spend to Creative Wales funding for scripted projects. While unscripted and animation formats tend to operate at smaller scales, they often deliver competitive returns relative to their budget size, reflected in a lower VfM threshold of 6:1 for unscripted content. The games sector, while early in its development, presents an opportunity for strategic investment to stimulate growth in high-value, digitally led content creation.

3.4.3. Analysis by single series vs. recommissioned

Of the 45 Creative Wales-funded productions included in this analysis, 35 have confirmed their broadcast status. Of these, 19 were produced as single series and 16 have been recommissioned for additional seasons. The remaining 10 are either yet to air or awaiting confirmation of follow-on investment and are therefore excluded from this analysis.

Between 2020 and 2025, Creative Wales invested £8.5 million in single series and £8.7 million in productions which have been recommissioned for additional seasons. These investments supported £105.9 million and £101.5 million in direct production spend respectively, equating to a return of:

- £12.41 of production spend per £1 of Creative Wales funding for single series; and
- £11.62 per £1 for recommissioned series.

Focusing only on direct and supply chain (indirect) effects, this breakdown offers insight into how economic returns differ between initial series development and continued production.

Table 3.4: Economic impact and return on investment by production genre

Type of Impact	Single Series	Recommissioned
Creative Wales production funding	£8.5 million	£8.7 million
Number of projects	19	16
Total direct production spend	£105.9 million	£101.5 million
Production spend per £1 of Creative Wales Funding	£12.41	£11.62
Total GVA	£57.6	£57.8
GVA per £1 of Creative Wales funding	£6.75	£6.63
FTE jobs	1,054	1,035
Cost per FTE job	£8,095	£8,431

Source: Wavehill Analysis. Please note that financial figures have been rounded to the nearest £100,000 and Jobs have been rounded to the nearest 10.

Note: GVA and FTE figures presented only include direct and indirect impacts

Single series productions generated £57.6 million in GVA, supporting 1,054 FTE jobs. This represents £6.75 in GVA per £1 of Creative Wales funding, for a total of £8,095 per FTE job supported.

Recommissioned series generated £57.8 million in GVA and supported 1,035 FTE jobs, equating to £6.63 in GVA per £1 of funding, and a cost of £8,431 per FTE job.

These findings suggest broadly similar levels of economic return and employment impact between new and recommissioned series. While single series offer slightly higher leverage on production spend and GVA, recommissioned projects contribute to employment continuity and build on established infrastructure and skills. The near parity in outcomes reflects the strategic value of both investing in new content and sustaining successful IP, with both playing a complementary role in the growth and resilience of Wales' screen economy.

3.4.4. Analysis by Welsh language productions

Between 2020/21 and 2024/25, Creative Wales has allocated approximately £2.0 million across 10 Welsh-language productions, representing approximately 8% of total production funding. This investment reflects the programme's commitment to promoting cultural

diversity and supporting the Welsh Government's target of reaching one million Welsh speakers by 2050.

The total direct production spend associated with these Welsh-language projects is forecast to reach £30.2 million, equating to a leverage ratio of £10.40 for every £1 of Creative Wales funding. While slightly lower than the £12.31 per £1 ratio observed across non-Welsh-language productions, this still represents a strong return in terms of local economic activity.

Welsh-language productions are estimated to generate £10.7 million in GVA for the Welsh economy (realised and forecasted), equivalent to £5.47 in GVA for every £1 of Creative Wales investment. This compares to £6.87 per £1 generated by non-Welsh-language productions.

In employment terms, Welsh-language productions are estimated to support 180 FTE jobs, at an average cost of £11,126 in Creative Wales funding per job. This is approximately £2,347 more per job than the equivalent cost across non-Welsh-language productions, reflecting the typically smaller scale and lower budgets of Welsh-language projects.

Table 3.5: Economic impact and return on investment by type of Welsh language production

Type of Impact	Welsh language	Non-Welsh language
Creative Wales production funding	£2.0 million	£21.7 million
Number of projects	10	35
Total direct production spend	£20.4 million	£267.2 million
Production spend per £1 of Creative Wales Funding	£10.40	£12.31
Total GVA	£10.7 million	£149.2 million
GVA per £1 of Creative Wales funding	£5.47	£6.87
FTE jobs	180	2,470
Cost per FTE job	£11,130	£8,780

Source: Wavehill Analysis. Please note that financial figures have been rounded to the nearest £100,000 and FTE jobs have been rounded to the nearest 10.

Note: GVA and FTE figures presented only include direct and indirect impacts

While smaller in economic scale, Welsh-language productions deliver strategic and cultural value that extends beyond core GVA and employment metrics. As discussed in Section 6.2, these projects play a vital role in normalising the Welsh language in mainstream media, strengthening linguistic identity, and supporting Creative Wales' long-term vision for a bilingual and culturally vibrant screen sector.

3.4.5. Analysis by above-the-line and below-the-line spend

Production expenditure supported through Creative Wales funding can be broadly categorised into above-the-line (ATL) and below-the-line (BTL) spend. ATL refers to costs associated with senior creative roles such as writers, directors, producers, and principal cast. BTL spend encompasses the technical, operational, and logistical elements of production delivery.

Of the £287.6 million directly spent on production development between 2020 and 2025, £24.2 million (6%) was ATL spend and £389.0 million (94%) was BTL spend. This reflects the labour- and service-intensive nature of screen production, in which investment supports delivery and on-the-ground operations.

BTL activity is estimated to contribute the majority of economic value, generating an estimated £151.5 million in direct and indirect GVA and supporting 2,520 FTE jobs. This underscores the critical role of BTL spend in stimulating employment and embedding economic value within Welsh supply chains, studios, and crew networks.

ATL activity, while smaller in volume, still made a meaningful contribution. It generated £8.4 million in direct and indirect GVA and supported 130 FTE jobs. These roles tend to be higher paid and highly skilled, and their concentration in leadership and creative development is important for ensuring high-quality content and attracting productions to Wales.

Together, these figures illustrate how BTL expenditure anchors production value in local economies, while ATL spend supports creative excellence and content origination. A balanced funding model that enables both is essential to the health and competitiveness of the Welsh screen sector.

While non-crew spend typically delivers greater economic volume, crew expenditure is critical to the sector's creative identity, technical quality, and continuity. Ensuring that both areas are well supported remains essential to sustaining a competitive, resilient screen industry in Wales.

4. Wider spillover effects

While the direct and supply chain impacts of Creative Wales-funded productions are measurable to production activity itself, there are wider economic effects that fall outside the immediate production value chain. These spillover impacts refer to secondary benefits arising from production outputs, such as increased tourism, higher merchandise sales, and longer-term investments in infrastructure and skills.

While these effects are less easily attributable to a single production, they form an important part of the wider value ecosystem surrounding Creative Wales' support for the screen sector. A summary of estimated economic value from these spillover activities is presented in Table 5.1, which includes direct, indirect, and induced impacts where available. These findings are explored in greater detail in the following sections. Headline findings:

- Tourism accounted for the largest share of potential spillover impacts. Illustratively, this is estimated to contribute between £45.3 million and £226.4 million in GVA, supporting between 1,110 and 5,570 years of employment. However, it is important to note that tourism has not been the primary focus of this study, and these figures should therefore be treated as indicative only; for more information, see Section 4.1.1 for assumptions used. Nonetheless, the analysis highlights the significant influence that screen content can have on destination awareness and visitor behaviour.
- Film festivals and cinema-related activities, though smaller in scale, generated a combined £1.9 million in GVA and supported 50 years of employment, illustrating their value in driving cultural participation and localised economic activity.
- Education and skills interventions, outside of training delivered as part of the funded productions, contributed an estimated £0.8 million in GVA and supported 15 years of employment, reflecting Creative Wales' wider role in talent development and longer-term workforce resilience.

Table 4.1: Total wider economic value

	GVA (million)	Years of employment
Tourism – 0.5% attribution rate	£45.3	1,110
Tourism – 2.5% attribution rate	£226.4	5,570
Cinema	£0.7	16
Film festivals	£1.2	35
Education and skills	£0.8	15
Studios	£1.9	41

Source: Monitoring information. This table includes direct, indirect and induced economic impact. Please note that financial figures have been rounded to the nearest £100,000.

4.1. Tourism

The role of Creative Wales-funded productions in promoting Wales as a visitor destination emerged as a recurring theme during stakeholder consultations (n=8). The portrayal of Welsh stories, culture, and landscapes on screen was consistently cited as a driver of interest in visiting Wales, particularly when productions highlighted lesser-known towns, rural regions, and distinctive natural settings. One consultee noted that Creative Wales' focus on funding productions with strong Welsh portrayals, such as *Lost Boys* and *Fairies*, has delivered and continues to deliver tourism benefits.

Several consultees (n=4) specifically referenced high-profile series such as *The Pact* and *Sex Education* as significantly enhancing the visibility of Welsh landscapes, communities, and cultural landmarks. One consultee said that “the show has a particular look which showcases Wales and has definitely increased tourism to the Wye Valley due to the cultural impact on the area”. A frequently mentioned example was *Pen ar Y Bryn/Tree on a Hill*, filmed in and around Ystradgynlais, which consultees reported had “put this small village on the map and captures the landscape of the place” by showcasing its scenery to national and international audiences.

This qualitative feedback aligns with the academic literature on film and TV-induced tourism, which suggests that screen content can elevate the appeal of locations that were not previously considered tourist destinations¹². This occurs when audiences are motivated to visit places they have encountered through film or television, drawn by the storylines, scenery, or symbolic content. In this context, the Wye Valley (*Sex Education*) and Ystradgynlais (*Tree on a Hill*) are tangible examples where screen exposure may have led to increased tourism interest.

Additional examples cited during consultations, including *The Guest*, *The Pact*, and *Death Valley*, demonstrated how Creative Wales-funded productions showcased the diversity of Welsh landscapes, reinforcing perceptions of Wales as a visually distinctive and culturally rich destination. This supports findings from research on screen tourism, which identifies landscape, narrative, and character representation as “iconic” elements capable of stimulating visitor demand and shaping destination image¹³.

In addition to its economic value, screen tourism can enhance Wales' international profile, support local place-branding strategies, and generate pride in place for local communities^{14,15}. However, any increase in visitor numbers, particularly to remote or ecologically sensitive sites, will require careful management to ensure the long-term

¹² Dupont, N. (2021) [‘Local Aspects and Impacts of Film-induced Tourism’](#). The French Journal of Media Studies. (Accessed: 7th May 2025)

¹³ Riley, R., Baker, D. and S. Van Doren, C. (1998) [‘Movie induced tourism’](#). *Analysis of Tourism Research*, 25(4), pp. 919-935. (Accessed: 7th May 2025)

¹⁴ Jones, B. (2024) [Screen Tourism: Regional development, fan labour and sustainability](#) (Accessed: 22nd May 2025)

¹⁵ Welsh Government (2025) [Set-jetting: the latest trend showcasing Wales to the world](#) (Accessed: 22nd May 2025)

sustainability of both the natural environment and the communities that host screen tourism¹⁶.

4.1.1. Economic contribution of screen-induced tourism

Between April 2021 and 2024, Wales welcomed approximately 213.2 million day trips and 39.5 million overnight holiday trips from British residents, who collectively spent an estimated £13.0 billion in the Welsh economy¹⁷. This analysis specifically uses tourism data from 2021 to 2024, as the earliest Creative Wales-funded productions, *Roald and Beatrix: Tail of the Curious Mouse*, were broadcast in December 2020. Tourism data for the 2020/21 financial year has therefore been excluded due to limited potential for measurable impact within this period, as well as data gaps arising from the COVID-19 pandemic. 2024 represents the latest available tourism statistics.

It should be noted that not all Creative Wales-funded productions are intended to promote Wales as a screen tourism destination, nor are all set in recognisably Welsh locations. Likewise, some productions funded later in the period may not yet have been released or reached a wide enough audience to influence travel decisions. In addition, the analysis focuses solely on British residents due to data availability; potential overseas screen tourism impacts are not included. As such, this modelling provides an indicative estimate of the possible scale of screen-induced tourism.

This evaluation has not directly collected primary evidence on visitor attribution. Instead, these illustrative attribution rates have been derived from existing external evidence, including Visit Wales' Market Demand Study (2024), which found that 10% of respondents were planning to visit locations featured in film, television, or literature¹⁸. Additional context from the Great Britain Tourism Survey, shared by Creative Wales, provides further insight into motivation: 3% of visits to Wales between 2022-23 included a visit to a location associated with a TV series, film, or literature. When considering those who cited this activity as a small, main, or major reason for their trip, the weighted average falls to 2%; when considering only those for whom it was a main or major reason, it reduces to approximately 0.8%.

Broader evidence from VisitBritain¹⁹ and the British Film Institute (BFI) Screen Business Report²⁰ suggests attribution rates of around 1 in 6 (17%). However, these studies include international visitors to the UK and should therefore not be directly compared with the domestic-only data used in this analysis.

Based on this evidence and following consultation with the Welsh Government, a conservative attribution rate of 0.5% to 2.5% has been assumed to illustrate the potential additional value of screen-induced tourism from Creative Wales projects. This range reflects

¹⁶ [News Report Film Tourism: Blessing or a Nightmare for Travel Destinations, 2025](#)

¹⁷ [Stats Wales Domestic GB Tourism Statistics](#)

¹⁸ [Welsh Government, Tourism market demand reports, 2025](#)

¹⁹ Visit Britain (2024) [The influence of Film and TV locations on visits to the UK: Nation Brands Index 2023](#) (Accessed: 22nd May 2025)

²⁰ BFI (2021) [Screen Business Report](#) (Accessed: 22nd May 2025)

both the available evidence and a judgment-based adjustment to account for attribution uncertainty.

Applying this range, an estimated £65.2 million to £325.8 million in visitor spend between 2021 and 2024 can be linked to interest in screen-based content. This activity is estimated to have stimulated an additional £15.2 million to £76.1 million in supply chain (indirect) activity. Combined, this is estimated to have contributed £40.6 million to £203.0 million in GVA, supporting 1,050 to 5,270 person years of employment in Wales, or approximately 350 to 1,760 FTE jobs annually.

In addition, induced effects generated by household re-spending of income supported by direct and indirect screen-tourism activity are estimated to have contributed an additional £33.2 million to £166.0 million in spending. This has resulted in GVA of £4.7 million to £23.4 million and 60 to 300 person-years of employment, or 20 to 100 FTE jobs annually.

These figures demonstrate the substantial economic potential of screen-induced tourism as a spillover benefit of Creative Wales' production funding. While attribution is necessarily modelled and cannot be precisely assigned to individual productions, the evidence points to a link between on-screen representation of Welsh locations and increased tourism activity.

Table 4.2: Economic contribution of screen-induced tourism

Type of impact	Attribution rate – 0.5%		Attribution rate – 2.5%	
	GVA	Person-years of employment	GVA	Person-years of employment
Direct	£33.1 million	900	£165.7 million	4,520
Indirect	£7.5 million	150	£37.2 million	750
Induced	£4.7 million	60	£23.4 million	300
Total	£45.3 million	1,110	£226.4 million	5,570

Source: Monitoring information. Please note that financial figures have been rounded to the nearest £100,000 and jobs have been rounded to the nearest 10.

4.2. Exhibitions

Creative Wales-funded productions are not only a driver of economic activity during development and production but also contribute to Wales' screen economy through audience-facing exhibitions, namely cinema releases and film festivals.

Creative Wales also supports the Film Hub Wales scheme, 'Made in Wales', through grant funding. The scheme is designed to help Welsh cinemas by showcasing films made in Wales, either fully or partially, and with or without Creative Wales support.

4.2.1. Cinema releases

Two Creative Wales-supported productions in the scope of the study have secured cinema distribution in recent years: Kensuke's Kingdom and Almond and the Seahorse. These releases have delivered additional value beyond initial production expenditure by generating box-office revenue and stimulating cinema-related visitor activity in Wales.

Across both titles, box office attendance is estimated at approximately 30,200 tickets, generating £197,500 in total box office revenue. Based on tourism statistics²¹, these exhibitions are estimated to have contributed approximately £809,000 in direct visitor spend. Taken together, this activity is estimated to have supported £665,000 in GVA and approximately 16 person-years of employment across Wales. While modest in absolute terms, these outcomes highlight the potential for Creative Wales-supported cinema releases to generate place-based economic value.

4.2.2. Film and TV festivals

In addition to providing a platform for national and international recognition of Welsh creative talent, film and TV festivals generate economic activity through event-driven tourism and help strengthen the wider screen and digital ecosystem.

Since its establishment, Creative Wales has provided £81,000 in funding to support eight film and TV festivals, including Focus Wales, Wales Screen Summit and Iris Prize, among others. For four of these events, Creative Wales funding formed part of a wider funding picture totalling an additional £547,000. This combined funding contributed to the delivery of festival programmes, venue hire, marketing, staffing, and associated events.

Across the five festivals for which data is available, over 17,000 attendees were recorded. Visitor data suggests these events contributed approximately £677,000 in direct tourism-related spend, including accommodation, transport, food and drink, and retail. Based on total festival delivery and visitor spend (funding and match combined), the gross economic impact of these activities is estimated at £1.1 million in GVA and 33 FTE jobs within Wales through direct and indirect activity, which rises to £1.2 million in GVA and 35 person years of employment when induced effects are included.

Beyond immediate spend impacts, film and TV festivals help cultivate local creative networks, attract industry stakeholders and talent to Wales, and offer career-entry and promotional opportunities for emerging creatives.^{22,23} By strengthening audience engagement and international visibility, they play an important role in reinforcing Wales' identity as a hub for culturally rich, globally relevant screen content.²⁴

4.3. Studio

Creative Wales' production funding plays an important enabling role in building the conditions for long-term investment in Wales' screen and digital infrastructure. While the production funding programme does not directly fund physical infrastructure such as studios, by anchoring productions in Wales and signalling a supportive policy environment, Creative Wales has helped make the nation a more attractive location for inward

²¹ [Welsh Government Domestic GB Tourism Statistics, 2025](#)

²² Greenlight coverage (2025) [What Are Film Festivals' Importance and Impact?](#) (Accessed: 22nd May 2025)

²³ Ffilm Cymru Wales (2024) [Welsh cinema sector strengthened with Ffilm Cymru Wales funding](#) (Accessed: 22nd May 2025)

²⁴ National Assembly for Wales (2019) [Inquiry into Film and Major Television Production in Wales](#) (Accessed: 22nd May 2025)

investment. This positioning is important given the new studio developments, including Shinfield Studios in Reading in 2024 and wider global volatility, as discussed in Section 8.

As screen content demand continues to grow globally, producers and investors increasingly seek locations with both reliable production incentives and the physical infrastructure to support high-quality output. The consistent flow of productions supported by Creative Wales has helped demonstrate that Wales offers a skilled workforce, diverse locations, and a track record of delivery. This makes it a viable and attractive base for studio operators and investors.

Creative Wales-supported productions have made significant use of studio infrastructure across Wales. Where data was available, the studios listed in Table 5.3 were used by 17 funded productions. These examples illustrate the breadth of studio facilities that have supported productions and show how public funding has helped sustain the utilisation of existing studio capacity across Wales.

Importantly, the studio usage reflects a notable geographic spread, with facilities used in both South East Wales (e.g. Dragon Studios, Great Point Studios, Roath Lock Studios, Wolf Studios, Urban Myth Studios, Whisper Cymru Broadcast Hub) and South West Wales (e.g. Bay Studios, Swansea), supporting the concentration of the screen industry around Cardiff and Bridgend while also extending activity into surrounding areas. This distribution underscores the role of Creative Wales funding in driving regional economic impact, helping to ensure that the benefits of production spend are not confined to a single cluster but spread across multiple locations. This contributes to regional employment, skills development and the resilience of Wales’ screen production infrastructure.

Table 4.3: Studios based in Wales used as part of Creative Wales-funded productions

Studio	Location	Creative Wales productions hosted
Bay Studios	Swansea	1
Dragon Studios	Bridgend	4
Great Point Studios	Cardiff	2
Dragon Studios and Great Point Studios	Bridgend and Cardiff	1
Roath Lock Studios	Cardiff	2
Wolf Studios	Cardiff	2
Urban Myth Studios	Newport	3
Whisper Cymru’s Broadcast Hub	Cardiff	1

Source: Monitoring information

One of the most tangible examples of this wider enabling effect is the development of Aria Studios in Anglesey. The facility was part-funded by S4C, Creative Wales, and Rondo Media, with stakeholders noting that the growing pipeline of productions supported by the programme was a contributory factor in justifying the business case for developing new studio facilities in North Wales. One stakeholder noted that Creative Wales funding has “helped keep jobs in North Wales and given some skills development to staff as well as helped us build on the diversity of staff”. The presence of a vibrant and regionally distributed

production sector reduces risk for private investment and supports long-term infrastructure planning.

Analysis of the capital and operational expenditure to date suggests that Aria Studios has contributed approximately £1.9 million in GVA and supported 41 employment years within Wales' economy. These benefits are expected to grow as the site attracts further productions and becomes increasingly embedded within the national production ecosystem.

While the economic impact assessment presented below covers only the construction and operational effects of Aria Studios, it does not include the economic activity generated by site users and productions enabled by the site beyond those funded by Creative Wales.

Separate unpublished research by Aria Studios further underscores the value of on-site production. In 2024/25 alone, hosted productions, including a major US feature film, generated over £1 million in local economic impact and supported more than 150 freelancers. Additional benefits included new business for local suppliers (e.g., over £100,000 for a set construction company supporting five local artisans) and outreach activities engaging over 1,000 pupils and 345 students through studio tours and workshops. This wider activity underscores the studio's role as both an economic driver and a platform for skills, education, and community engagement.

4.4. Education and skills

Creative Wales' production funding model has played a key role in advancing workforce development and industry-specific training across Wales. This support has focused on expanding the local talent pipeline and developing skills aligned with the evolving needs of the screen and digital sectors.

A key theme to emerge from consultations was Creative Wales' role in supporting trainees to gain practical work experience across a variety of production companies and departments (n=10). This is through Creative Wales' mandate of paid training placements on funded productions. Creative Wales works with organisations including Sgil Cymru, Screen Alliance Wales, Culture Connect Wales, ScreenSkills and NFTS Wales to provide these opportunities to trainees and apprentices, enabling them to develop practical, job-relevant skills.

This is consistent with research from ScreenSkills on placements in the United Kingdom (UK) film and children's TV, which found that learning and training in the screen sector are intrinsically centred on work-based opportunities, with placements providing access to real-world experience, professional networks, and skill development that are essential for career progression.

Creative Wales monitoring data shows that, of the 43 productions with available data, they delivered opportunities for 425 trainees, and 48 trainees (across 34 productions) were given upskilling opportunities. These experiences helped trainees build professional networks, earn industry credits, advance within the creative sector, and enhance their employability.

Some stakeholders (n=4) also positively referenced the Stepping Up programme for providing a structured pathway for trainees to move into more mid-range or senior roles. This was run by Sgil Cymru and previously co-funded by Creative Wales and ScreenSkills. Stakeholders said that the Stepping Up programme “was important within production as it gives experience to crew members and allows career development” and created “significant training opportunities due to the Creative Wales funding”. Consultees (n=2) also cited shadowing and mentorship as effective methods for Heads of Department (HoDs) to build capacity and confidence among early-career professionals.

These findings are underscored by research from the Creative Industries Federation and Arts Council England, which emphasises the importance of public investment in enabling production companies to provide training for those who go on to work within commercial creative businesses and the wider creative economy. Such investment helps to address skills gaps, supports career development, and strengthens the long-term sustainability and diversity of the creative workforce²⁵.

Between 2020 and 2025, Creative Wales has supported over 50 creative sector skills projects. This includes five training and skills initiatives on the funded productions in scope of this study, where Creative Wales has committed approximately £611,000, leveraging an additional £266,000 in match funding from industry and other partners, including:

- Culture Connect Wales provides mentoring and placement support tailored to diverse talent across the screen sector;
- Wellbeing Facilitators trained six individuals to engender more equal and positive working environments in screen productions;
- Creative Wales ensures that all its funded productions host at least one apprentice from Sgil Cymru’s Criw (North and South) programme, offering on-the-job training; and
- The Developing HoDs scheme, co-funded with ScreenSkills, supports the transition of experienced crew into Head of Department roles.

The total combined Creative Wales and match-funded investment totals £877,000, supporting both direct employment and a broader ecosystem of training providers, mentors, and programme delivery partners. The estimated economic contribution of this spend includes £807,000 in GVA to the Welsh economy and approximately 15 person-years of employment.

²⁵ [Arts Council England, Public Investment Public Gain, 2019 Report](#)

Case Study: Sgil Cymru Apprentice 1

An individual with an administrative background successfully transitioned into the film and TV industry through the Sgil Cymru apprenticeship programme. The programme enabled the apprentice to work on and gain experience across multiple Creative Wales-funded productions.

On their first production, *Black Cake*, the apprentice worked with senior team members on tasks such as drafting stunt contracts, liaising with finance teams, and serving as a production runner. This helped them develop an understanding of production coordination and build professional credibility.

The smaller-scale production *Until I Kill You* offered closer interaction with crew members and further opportunities for responsibility. During the apprenticeship, the individual also undertook a placement at Cardiff-based post-production company Gorilla, where they observed editing workflows and deepened their understanding of the full production cycle.

These cumulative experiences allowed the apprentice to build a diverse skill set and earn multiple production credits, an important factor in employability in the screen industry. Their growing network of professional contacts also led them to assist Line Producers with sourcing local talent for future productions.

Following completion of the apprenticeship, the individual secured a role as a Production Secretary on high-profile projects including *Casualty*, *Doctor Who*, *Generation Z*, and *The Scurry*. Their work on *The Scurry* led to further advancement into the role of Assistant Production Coordinator, and they were subsequently invited to continue in this capacity on *Under Salt Marsh*, a Creative Wales-funded production. The apprentice described this opportunity as a direct outcome of their training and of the trust they had built with production managers during earlier placements.

5. Wider economic effects of Creative Wales-funded productions

This chapter presents evidence on the wider economic outcomes associated with the Creative Wales Production Funding programme, including support for production companies, freelancers, and crew members, as well as for the screen and digital sector.

5.1. Supporting independent production companies

5.1.1. Sustainability and resilience of production companies

In line with the objectives set out in the Welsh Government's Economic Contract, particularly around fostering business resilience and attracting investment into the Welsh economy²⁶, stakeholders noted that the funding has contributed to greater resilience for production companies in two main ways.

- The increased volume of productions helps to ensure a stable pipeline of work for production companies, allowing them to retain and develop the experience of workers while gaining credits for in-house production staff (n=4); and
- A few consultees (n=3) noted that Creative Wales' funding had enabled production companies to diversify into new genres, which, in turn, had developed the experience and credits of their staff. For example, funding from Creative Wales enabled Yeti TV to produce a true crime series, which helped build trust with broadcasters and led to subsequent commissions.

These findings are also consistent with trends identified in wider UK industry reports, including those by the Creative Industries Federation and Arts Council England²⁷. The report highlights that public investment in the creative industries contributes to three key themes within the sector: talent, jobs and growth; innovation; and new models of investment. By providing training opportunities to address skills shortages and gaps within the sector, mitigating the risks involved in testing new ideas, and unlocking private and commercial investment, public investment supports the future prosperity and sustainability of these organisations.

5.1.2. Retention of intellectual property

Due to the evolution of film and TV financing away from the traditional studio system towards independent financing models, independent production companies often rely on a mix of funding sources to realise their projects²⁸. The rise in subscription video-on-demand (SVoD) platforms has led to greater prominence of co-productions with international production companies and inward investment from SVoD platforms.

While such arrangements can provide essential capital, evidence from two stakeholders and a recent House of Commons report highlights that they often require independent

²⁶ [Welsh Government Economic Contract with Businesses](#)

²⁷ [Arts Council England, Public Investment Public Gain, 2019 Report](#)

²⁸ [The Reaction Lab Blog: The Evolution of Film Financing: From Studio Systems to Independent Filmmaking](#)

production companies to forfeit some or all of their intellectual property (IP) rights. This can constrain long-term creative control, limit secondary revenue potential, and affect business growth²⁹. Access to regional funds reduces reliance on overseas commissioners, which, unlike UK public service broadcasters, are not subject to the same ‘terms of trade’ protections established under the Communications Act 2003³⁰.

Several stakeholders (n=6) emphasised that Creative Wales funding helps mitigate these pressures by enabling companies to retain greater ownership over their IP. This, in turn, supports long-term economic resilience by preserving secondary revenue streams (e.g., international sales and licensing) and allowing profits to be reinvested in business development.

One example cited by consultees was *The Pact*, produced by Little Door. Creative Wales funding was described as having enabled the company to retain IP rights and reinvest returns from the first two series into developing an in-house slate of projects. This led directly to the creation of *Under the Salt Marsh*, a ‘band 3’ production for Sky Studios, with IP retained by Little Door. As one stakeholder put it: “Creative Wales funding has been integral. It’s been the business stepping stones for us to get to this band 3 show”

Preserving IP ownership was seen by some stakeholders (n=6) as an important enabler of the sustainability of Welsh-based production companies, with wider and longer-term economic benefits – such as the creation of permanent contracts for staff and the resilience and growth of the screen and digital sector. One stakeholder noted that the main economic benefit of Creative Wales funding for production companies is that it “helps keep production work in-house and in Wales” and reiterated that “IP ownership is a revenue driver, contributing to the overall economy”.

These findings are consistent with wider industry research. A 2023 report by Oliver & Ohlbaum Associates concluded that IP retention by independent production companies plays a foundational role in international success³¹. By maintaining ownership of secondary domestic and international rights, production companies are better positioned to diversify income sources and maximise long-term value after initial licence periods expire.

5.1.3. Enhancing in-house capabilities

Some stakeholders (n=4) highlighted that Creative Wales funding enabled production companies to work on more ambitious or technically complex productions, thereby strengthening their internal capabilities and in-house expertise.

In addition to the example of *The Pact* referenced in Section 5.1.2, another notable case is Bumpybox, a Cardiff-based animation studio. Following the development of two IP-owned

²⁹ [British film and high-end television](#)

³⁰ [Communications Act 2003, c. 21](#). Under the Communications Act 2003, Public Service Broadcasters (PSBs) are subject to ‘terms of trade’ when agreeing terms for the commissioning of independent productions. They enable independent producers to retain intellectual property (IP) rights to their programmes and have an obligations to use independent producers for at least a defined minimum volume of their annual commissioning activities. SVoD platforms are not covered by terms of trade and therefore have no obligation to allow independent production companies to retain their intellectual property.

³¹ [Research Report for Pact, Celebrating 20 Years of Terms of Trade, Oliver & Ohlbaum Associates Ltd, 2023](#)

projects in Wales, one of which received support from Creative Wales, the company was invited by Lupus Films to co-produce Kensuke's Kingdom. This marked Bumpybox's first involvement in a UK animated feature film and significantly enhanced its operational and creative capacity, helping to establish its position within the animation sector.

5.1.4. Raising international profile and reputational capital

Several stakeholders (n=6) also noted that Creative Wales funding helped independent production companies enhance their international profile. As such, 44% of the projects received inward investment. In some cases, support enabled participation in high-profile co-productions, expanding visibility in global markets and strengthening relationships with broadcasters and distributors. An example of this is Bumpybox's involvement in Kensuke's Kingdom, which enabled it to co-produce an international feature film and demonstrate its capabilities to Lupus Films, leading to increased trust and a greater likelihood that Lupus Films would utilise the relationship on future projects.

5.2. Supporting freelancers and crew members

A key objective of Creative Wales' Production Funding programme is to strengthen the domestic workforce by ensuring that funded productions support local talent. As part of the programme's eligibility criteria, productions must employ at least 50% of their crew from Wales. Monitoring data show that, across 32 funded productions for which information was available, 29 in scope had over 60% of their crew from Wales.

Several stakeholders (n=6) highlighted the critical role of local freelance workers in enabling the delivery of screen productions commissioned in Wales, particularly in 'below-the-line' (BTL) roles such as camera, sound, set design, and production support³². It was noted that productions rely on freelance labour, much of which is local, making this cohort an essential part of the Welsh production ecosystem. One stakeholder from a London-based production company noted that the production, using Creative Wales funding, "widened their knowledge of high-quality freelancers and animation talent in Wales" and that they "went on to use in future productions".

5.2.1. Enhancing job security and stability

Stakeholders reported that the increased volume of productions supported by Creative Wales funding has provided more consistent opportunities for freelancers, contributing to improved job stability and continuity of employment (n=6). One stakeholder noted that the production meant they "reached out to more freelancers in Wales than they would normally, which has increased relationships and the likelihood of future productions in Wales". In a labour market characterised by its volatility and precariousness, this continuity was viewed as a key enabler for sustaining the freelance workforce in Wales³³.

The cumulative effect of on-the-job experience, combined with exposure to multiple productions and production teams, was noted to enhance freelancers' reputational capital,

³² Below the line refers to for the staff involved in the day-to-day filmmaking, encompassing pre-production, production, and post-production. Common below the line departments include Camera, Electrical, Production Design, Costume and Makeup.

³³ BECTU, [UK Film and TV Industry in Crisis](#), February 2024

particularly through the accrual of production credits. These network credits were considered important in improving freelancers' visibility and credibility in the sector, thereby increasing their likelihood of securing future work. This was seen as particularly important for early-career professionals, with stakeholders highlighting that repeated hiring was often based on prior performance and familiarity.

A further theme to emerge was the importance of relationship-building between trainees and HoDs. Exposure to HoDs across multiple productions was seen to facilitate trust and familiarity. This kind of relationship-building, along with the cumulative effect of regular freelance engagement, production credits, and increased industry visibility, will help grow and retain skilled creative professionals in Wales.

For example, two apprentices supported through Sgil Cymru attributed their progression into higher-skilled roles directly to relationships built with HoDs while working on Creative Wales-funded productions (see case study below).

Case Study: Sgil Cymru Apprentice 2

A year-long apprenticeship delivered through Sgil Cymru enabled this early-career professional to gain hands-on experience across three Creative Wales-funded productions: Black Cake, Steeltown Murders, and Tree on a Hill.

Working on Tree on a Hill provided the apprentice with increased responsibility and professional autonomy, as well as the opportunity to contribute to a Welsh-language production. Positive relationships built on set enabled the apprentice to have their own script reviewed by senior team members and receive informal mentorship with HoDs. Following the formal completion of the apprenticeship in July 2023, the apprentice was invited to remain involved during the post-production phase, gaining further technical knowledge and insight into the post-production process.

As a result of their work on Tree on a Hill and the relationships built through several other Creative Wales-funded productions, the apprentice was offered the opportunity to be a Production Secretary on The Undeclared War Series 2. The apprentice described this progression as unlikely without the foundation provided by the Sgil Cymru programme and the access to multiple Creative Wales-funded projects. The apprentice reflected this in a consultation: "People saw I was a good worker and wanted me as part of the team. Relationships built in my apprenticeship, and knowing who works well." Despite the increased responsibility, the production team supported their development through training courses and learning materials provided by Screen Alliance Wales.

Overall, the apprenticeship provided a strong foundation for career progression. It enabled the apprentice to gain industry credits, build relationships with professionals across multiple departments, and increase their visibility in the Welsh screen sector. Importantly, the opportunity to contribute to a Welsh-language production also strengthened their connection to Welsh culture and identity.

5.2.2. Workforce development through production experience

Several stakeholders (n=8) noted that Creative Wales-funded productions had contributed to the development of workforce skills and capabilities, particularly through opportunities to work across multiple projects. Repeated exposure to production environments enables freelancers, crew members, and early-career individuals to build their confidence, refine their craft, and take on greater responsibility over time. This was seen as particularly valuable for mid-career progression.

This cumulative, on-the-job development aligns with best practices in workforce development in the screen industries. Research from BFI³⁴ and WorldSkillsUK³⁵ highlights the importance of sustained exposure to production environments for helping individuals move from junior to mid- and senior-level roles.

One production lead described how working across a slate of funded projects and returning series enabled the same freelancers to progress from junior to supervisory roles, reducing future recruitment challenges and fostering a trusted crew base for future projects. This form of embedded growth not only supports individual career development but also enhances the production-readiness of the Welsh sector, giving incoming productions increased confidence in the local workforce.

Crucially, this also helps build a network economy within the Welsh screen sector, embedding local talent and infrastructure to support new productions, rather than relying on incoming professionals or losing skilled workers to more established hubs like London, the South East, or international markets. This “leaky” creative economy is an important consideration for Creative Wales: investing to ensure there are opportunities for talent to progress and experience rewarding careers in Wales.

5.3. Supporting the screen and digital sector

Creative Wales’ production funding plays a strategic role in strengthening Wales’ wider screen and digital ecosystem. This aligns with the Welsh Government’s designation of the screen and digital sector as a priority sector, contributing to both cluster development and sector resilience. Consultations identified four main pathways through which the funding has delivered wider benefits:

5.3.1. Strengthening the supply chain and local infrastructure

As part of the application process, production companies are assessed on their projected spend in Wales and their wider contribution to local economies. Several stakeholders (n=9) reported that Creative Wales production funding had incentivised companies to make greater use of Wales-based infrastructure and services across different stages of the production cycle, including post-production, electronic press kits, visual effects (VFX), and sound recording. One production lead said that “Welsh PEK company called Bright Branch

³⁴ [BFI, A Sustainable Future for Skills: the Report of the Screen Sectors Skills Task Force](#)

³⁵ [A report by Work Advance for WorldSkills UK, Skills for Success in the UK Screen Industries, 2024](#)

Media were great new collaborators”, along with Gorilla being a “key contact for post production going forward”.

Production leads (n=5) also noted that this increased engagement improved their awareness of the capabilities and reputations of local suppliers, heightening the likelihood of repeat collaboration. One frequently cited example was Gorilla TV, a Cardiff-based post-production company. Stakeholders explained that Creative Wales funding enabled production companies to engage Gorilla TV for the first time or broaden the scope of their involvement. In the case of Mad as Birds, initial collaboration with Gorilla TV led to a longer-term partnership, strengthening mutual trust and securing ongoing work for the supplier.

This form of supply chain engagement not only enhances the visibility and reputational capital of Welsh service providers but also fosters repeat business and long-term relationship-building, which are key components of cluster development and a resilient creative industries ecosystem in Wales.

Consultees (n=3) described how Creative Wales-funded projects had enhanced their future production capabilities by providing opportunities to trial new partnerships and strengthen trusted networks. In doing so, the programme is understood to contribute to the development of a more embedded and visible production base in Wales, supporting sector growth not only through immediate activity, but by building a longer-term pipeline of skilled professionals and suppliers.

5.3.2. Building enduring talent and creative networks

Some stakeholders (n=5) noted the value of relationships formed between production companies and freelance writers, directors, producers, composers and voice producers. For example, one production lead noted that “the production of one show helped build relationships with writers and HoDs, which were then used on a different show, which shows how the funding has allowed the production company to build up experience and talent in Wales”. These connections, particularly with HoDs, were viewed as particularly influential, helping sustain opportunities for the wider freelance workforce in Wales. The production lead noted that this has enabled the production company to build experience and talent in Wales and to secure longer-term contracts and employment continuity for crew members.

Two stakeholders noted the mutual benefits of university partnerships with productions, which provide students with practical experience and exposure to industry careers. One stakeholder reported that their trainees benefited from the collaboration with the University of South Wales, which provided mentoring support throughout the trainees’ time at the university.

5.3.3. Boosting inward investment and regional growth

Four stakeholders emphasised the role of Creative Wales’ funding in supporting regional growth and enhancing Wales’ attractiveness to international productions. Widening the exposure of HoDs and local talent was considered key to increasing commissioners’

confidence, particularly those from outside the UK, in Wales' capacity to host large-scale productions.

BCG analysis highlights that creating capabilities for talent to build sustainable careers is a supply-side intervention that helps increase confidence in the sector among foreign direct investors. A consultee from Sex Education, a show commissioned by Netflix, noted that the decision to film in Wales largely came from the fact that the production company "knew there was a good crew and infrastructure in Wales and wanted to use them". This shows there was confidence in the already present, strong infrastructure for the creative industries sector.

The growth of screen and digital hubs beyond South East Wales was also discussed, including increased production activity in Anglesey and Wrexham, with local businesses and creatives beginning to form micro-clusters in areas such as Caernarfon and Mid Wales.

6. Wider effects of the Creative Wales-funded productions

This chapter presents evidence on the wider social, cultural and environmental outcomes associated with Creative Wales' funded productions.

6.1. Social and cultural contributions of Creative Wales-funded productions

6.1.1. Workforce diversity and inclusive recruitment

There is emerging evidence from consultations that Creative Wales' production funding contributes to more inclusive and representative workforce practices within the Welsh screen sector by raising awareness of, and encouraging reflection on, wider considerations such as diversity and inclusivity as part of their application process – and therefore directly supporting the delivery of the Welsh Government's Workforce equality, diversity and inclusion strategy³⁶. This is supported by Creative Wales' requirement to either use a recognised training provider or to use open and fair practices in direct recruitment.

Several consultees (n=5) emphasised the importance of workforce diversity in enabling authentic storytelling. It was noted that diversity behind the camera, including among writers, directors, producers and HoDs, plays a critical role in shaping which stories are told and how they are portrayed on screen. This commitment to inclusive practice was reflected in several tangible ways across the productions examined:

- Five productions included in this study specifically referenced Equality, Diversity and Inclusion (EDI) commitments in their Economic Contracts, including actions to support inclusive recruitment.
- Two consultees noted that their production companies align with the BFI Diversity Standards to guide equitable opportunity and representation in staffing and content development.
- Four consultees described efforts to widen participation in the sector through platforms such as Culture Connect Wales, which were used to attract a more diverse range of trainees and early-career professionals. These practices were seen as essential not only for fair access but also for ensuring that a wider range of lived experiences and cultural perspectives inform storytelling.

6.1.2. Depiction of communities

Many consultees (n=4) noted that Creative Wales-funded productions have contributed to more authentic and inclusive on-screen representation of diverse communities and lived experiences. For example, *The Guest* was cited as a production that portrayed social class dynamics through the story of two women from different socio-economic backgrounds. Similarly, productions such as *Lost Boys and Fairies* and *Sex Education* were described as other examples which accurately portrayed intersectional race, gender and sexual lived

³⁶ [Programme for Government](#)

experiences of diverse communities and tackling difficult themes such as disability, trauma and shame.

Stakeholders involved in these productions provided anecdotal evidence that they have raised awareness and given others who relate to the experiences on screen increased pride and confidence. One production lead noted that “there is pride in place and more connection to people’s hometown through the production. People loved to see their hometown or city on television and recognised the places being filmed”.

These findings are supported by wider research on the impact of diverse and inclusive media content³⁷. Research indicates that diversity in popular film and TV enables the accurate portrayal of the lived experiences of both over- and underrepresented groups in society, helping reduce stereotypes and misconceptions. Other research supporting this point shows that inclusive content fosters deeper understanding among viewers from minority backgrounds and identities³⁸.

6.1.3. Community engagement

Several consultees (n=5) highlighted examples of wider community engagement generated through the funded projects. This included creative collaborations with local cultural groups, public engagement through screenings and events, and involvement of local businesses and amateur groups in production activity:

- One prominent example was *Lost Boys and Fairies*, which embedded local queer culture into the production by hiring Cardiff-based drag performers and queer community members as extras, showcasing music from 15 local artists, and working in partnership with a local queer film festival. As one production lead noted, this not only provided financial support to local performers but also helped raise the visibility of their community on prime-time television, contributing to cultural representation and pride.
- Other productions engaged directly with local residents through public screenings and interactive events. For example, *Kensuke’s Kingdom* was screened in Cardiff, with a post-show Q&A featuring the director and creative team, offering local audiences the opportunity to engage with the production and learn about the filmmaking process.
- Several productions also involved community organisations and amateur groups. One production worked with an amateur dramatics company and held outreach sessions at local colleges to raise awareness of career pathways in the creative industries beyond acting and directing. Another collaborated with a local rugby team and engaged local artists as extras in protest scenes.
- Several production leads also noted the significance of filming on location within Welsh communities, which led to indirect engagement through the use of local

³⁷ [Diversity and representation in TV and movies and why it matters, 2022](#)

³⁸ [Article, On-Screen Representation Means More Than Just Identity. It’s About Context, 2023](#)

facilities and services (e.g. catering, accommodation, and transport). In some cases, this contributed to a sense of regional pride with residents expressing enthusiasm at seeing familiar landmarks or communities depicted on screen.

Taken together, these activities illustrate how Creative Wales-funded productions can generate local cultural and civic benefits through community engagement. This contributes to greater awareness of the sector, strengthening local cultural identity, and fostering positive perceptions of the screen industries among residents and audiences in Wales. Wider literature³⁹ supports these claims, showing that social cohesion and the encouragement of public discourse are fostered by productions that integrate community engagement on-screen.

6.1.4. Healthier and safer production environments

Creative Wales' monitoring data indicate that four of the productions included in this study engaged a wellbeing facilitator as part of their crew. The role formed part of a wider pilot initiative, delivered in partnership with CULT Cymru from September 2022 to March 2023, in which ten production companies across Wales incorporated wellbeing facilitators to support the mental health of cast and crew⁴⁰. Following the successful pilot initiative, the wellbeing facilitator project has been funded year on year.

Wellbeing facilitators are intended to support the wellbeing of those employed on productions and help to identify and mitigate wellbeing risks through early intervention and ongoing support. At the time of this survey, the role was in the early stages of adoption. Initial feedback suggested that wellbeing facilitators can contribute to safer, more inclusive working environments and may offer a scalable model for the broader screen sector in Wales.

Case Study: Wellbeing facilitator role on Creative Wales-funded productions

The wellbeing facilitator has worked on several Creative Wales-funded productions over the past three years, providing an independent, neutral, third-party wellbeing presence and signposting to professional support. Their responsibilities typically include developing a mental health and stress risk assessment for productions in advance. This may include sensitive or particularly provocative topics related to the script, schedule, or production location.

The wellbeing facilitator described their role as enhancing their own professional development by expanding their skill set and informing their production work with a stronger emphasis on duty of care. Being embedded within productions has also increased exposure to HoDs and decision-makers, helping to normalise the inclusion of wellbeing facilitators in future work.

³⁹ [America's Youth and Community Engagement - Josh Pasek, Kate Kenski, Daniel Romer, Kathleen Hall Jamieson, 2006](#) & [Production Perspectives on Audience Engagement: Community Building for Current Affairs Television](#)

⁴⁰ [Caring for mental health in the Film and TV sector in Wales. 2023](#)

“It has been amazing to be part of this movement, making work work better for people so they can be their best selves at work and creating an environment where they can do that.”

The wellbeing facilitator also highlighted the value of establishing ‘wellbeing feedback loops’, a mechanism for sharing anonymised insights and good practice from each production. These can be compiled into guidance and recommendations for future projects, helping production leads embed better mental health practices across the industry.

6.2. Welsh language and Welsh portrayal contributions of Creative Wales-funded productions

Creative Wales’ production funding supports the Welsh Government’s strategic goal of reaching one million Welsh speakers by 2050, as set out in Cymraeg 2050⁴¹. The Welsh language is not only a cornerstone of national identity but a cultural asset that shapes the distinctiveness of Wales’ creative output. Across consultations and monitoring data, there is emerging evidence that funded productions are contributing to both the visibility and use of the Welsh language on screen and within production environments.

6.2.1. On-screen representation of the Welsh language and identity

Some stakeholders (n=4) noted that Welsh language visibility in mainstream productions helps generate awareness and interest among both fluent speakers and learners. This type of content was seen as a soft driver of language use, supporting a wider ecosystem of visibility, pride and uptake.

Several production leads (n=6) highlighted how Welsh language and identity are increasingly integrated into the creative content of funded productions, even where Welsh is not the dominant language. For example, *The Pact*, *Lost Boys* and *Fairies* blended Welsh and English in their scripts, reflecting the bilingual reality of life in Wales. Consultees saw this as contributing to cultural authenticity and normalising the use of Welsh on mainstream platforms.

The Cardiff-based animation studio Bumpybox noted that its work on *Tiny Buds*, which featured strong Welsh accents and was broadcast on S4C and ITV, had a visible cultural impact. The representation of regional accents and Welsh settings was described as helping to promote Welsh identity to broader audiences, particularly younger viewers, while challenging stereotypes and improving the cultural relevance of children’s media.

6.2.2. Enabling Welsh language production and distribution

Since its inception, Creative Wales has co-funded 10 Welsh-language productions in partnership with S4C, the national Welsh-language broadcaster, representing more than one in five of the 45 productions within the scope of this study. The economic value and return on investment of Welsh-language productions are presented in Section 3.4.

⁴¹ [Cymraeg 2050: Welsh Language Plan](#)

These investments have contributed to the development, broadcast and consumption of a wide range of Welsh-language content spanning drama, factual and entertainment genres. Evidence from the 2022/2023 impact assessment of S4C by Wavehill found that⁴²:

- 86% of Welsh-speaking viewers felt that S4C was important to the Welsh language⁴³;
- Viewers widely recognised the channel's role in promoting and normalising Welsh language use;
- Content was seen as fostering cultural pride and reflecting a modern, plural Wales.

Creative Wales' support for S4C commissions complements these outcomes, providing funding stability and creative opportunities for production companies to develop and deliver Welsh-language content to a high standard.

6.2.3. Welsh language off-screen

Beyond screen representation, several production leads emphasised that Creative Wales funding supports a Welsh-language production environment behind the camera. It is considered that supporting Welsh-speakers in production will help develop bilingual workplaces, enable crew to work in their native language, and ensure that economic benefits are retained locally. Stakeholders noted (n=3) that enabling Welsh speakers to live and work in Wales, particularly in creative sectors where out-migration is common, contributes to social wellbeing, community stability, and language preservation.

There were also views (n=2) that productions working bilingually or predominantly in Welsh promoted greater pride in the language and culture among cast and crew. This was highlighted by an apprentice, who noted that the "main benefit of the production was that they were around Welsh speakers", which made them "realise how important the Welsh language is and helped them connect with Welsh culture and heritage".

6.2.4. Portrayal of Wales

The depiction of Welsh culture on screen was also commented on by stakeholders, who noted that Creative Wales funding enabled the representation of Welsh stories and landscapes.

One key impact was increased visibility of Welsh locations in screen content. Productions such as *The Guest*, *The Pact*, *Sex Education* and *Tree on a Hill* were reported by consultees to have showcased different sides to Wales by increasing the visibility of smaller Welsh towns and backdrops on screen. As such, a production lead commented on the fact that the project "completely encapsulated Welsh culture by representing Welsh countryside and cities, which shows a different light of Wales and is representative of different Welsh culture". According to stakeholders involved in each production, in some cases this had cultural and social significance for places such as the Wye Valley (*Sex Education* filming location), Ystradgynlais (*Tree on a Hill*) and Rhyl (*Hafiach*), contributing to a stronger sense

⁴² [Report - Assessment of S4Cs Economic and Social Impact 2022-23.pdf](#)

⁴³ S4C 2022–23 Image Tracking Survey, Beaufort Research (2023)

of local identity and increased interest in these areas from wider audiences – a sentiment agreed by some stakeholders (n=4).

In addition to location-based representation, consultees also emphasised the importance of storytelling that reflects distinctively Welsh narratives. Productions such as Madfabulous and The Peace Particle were cited as examples of “untold Welsh stories” brought to the screen through public funding. The Peace Particle, in particular, was noted by stakeholders for its unique focus on Welsh scientists at CERN and for promoting scientific collaboration through Welsh. This was viewed as both culturally and educationally impactful, particularly given the underrepresentation of science content in Welsh-language media.

6.3. Environmental contributions of Creative Wales-funded productions

Creative Wales’ production funding aims to support inclusive and sustainable economic growth in Wales. As set out in the programme’s application guidance⁴⁴, one of the core funding principles is to prioritise projects that contribute to the Welsh Government’s well-being and environmental goals.

6.3.1. Production development emissions

Creative Wales-funded productions are estimated to generate a total of 33,460 tonnes of CO₂ equivalent (CO₂e). This figure includes emissions associated with direct production activities, local supply chain expenditure, and embedded emissions from goods and services procured outside Wales.

This translates to approximately 116 tonnes of CO₂e per £1 million of production spend, a figure that is 17% lower than the benchmark used for comparative analysis – the Scottish Government’s Carbon Assessment of its 2025 to 2026 budget⁴⁵. This suggests that Creative Wales-supported projects have a lower-than-average emissions intensity.

These findings are based on modelled estimates derived from I-O analysis using sector-specific carbon multipliers. While precise project-level emissions reporting was not available for all productions, these aggregate estimates provide a useful indication of carbon intensity across the programme.

6.3.2. Sustainability coordinators

Creative Wales has supported the integration of sustainability coordinators into funded productions as part of a growing emphasis on low-carbon working practices. These roles, developed in conjunction with Media Cymru’s sustainability coordinator training programme, enable trainees to apply their learning in live production environments and build industry networks. The programme is delivered by a full-time sustainability lead and coordinator based at Severn Screen.

⁴⁴ Welsh Government, [Creative Wales Production Funding Application Guidance](#), May 2023

⁴⁵ The [Scottish Government’s carbon budget report](#) suggests that for £63.5 billion of spending they generate 8.9 million tonnes of carbon – equating to 140 tonnes of CO₂e per £ million of spending

Sustainability coordinators are embedded throughout the life cycle of a production, identifying opportunities to reduce environmental impact across the supply chain. Examples cited by two stakeholders included:

- Partnering with local organisations to reuse or compost food waste;
- Procuring suppliers and services locally to reduce transport-related emissions;
- Donating unused costumes and materials to community groups post-production.

Notably, high-profile productions such as *Havoc*, which received Creative Wales funding, have demonstrated the role's potential to improve production sustainability in practice.

6.3.3. Screen New Deal

The development of the sustainability coordinator role aligns closely with the BFI's Screen New Deal: Transformation Plan for Wales, which provides a strategic roadmap to transition the screen sector toward net zero. This plan, published in 2023, builds on the original UK-wide Screen New Deal (2020) and was co-led by Creative Wales, in partnership with Arup, the BFI, Ffilm Cymru Wales, and Media Cymru.

The production of '*Havoc*' served as an early case study in this transformation process. Insights from its sustainability coordination fed directly into the plan, demonstrating how environmental best practices can be operationalised on large-scale productions. This coordination between funding, practice, and policy offers a replicable model for embedding sustainability within Wales' screen infrastructure.

6.3.4. Wider environmental contributions

Several stakeholders (n=13) highlighted that environmental sustainability is an important part of the funding application process and productions that could demonstrate contributions were viewed more favourably – this not only raised awareness of the importance of sustainability but also encouraged behavioural change:

- **BAFTA Albert certification** - one of the main ways productions demonstrated their environmental contributions was through the attainment of a BAFTA Albert certification. Albert certification involves completing a carbon footprint calculator to forecast emissions and benchmark against future production. The process also involves being paired with a member of the Albert team at BAFTA, who will propose a series of recommendations to the production to reduce its environmental impact. Every production lead consulted as part of this research was working on productions that had received Albert certification.
- **Implementation of sustainable practices** - several stakeholders (n=7) noted that they had already implemented many of their recommendations, including using an electric vehicle fleet and non-diesel generators for productions, banning single-use plastics on set and using vegan caterers to reduce the carbon footprint of their food consumption.

- **Environmental storytelling and audience awareness** - two consultees also highlighted the role of content in promoting environmental awareness. Productions that embed sustainability themes or address climate-related issues were seen as having a dual impact, both through operational practices and through contributing to public discourse on the environment.

Case Study: Sustainability coordinator role on Creative Wales-funded productions

As part of their role, the sustainability coordinator ensures productions follow Albert Certification, taking action to reduce carbon emissions and engaging crew members on sustainable working practices – including using green supply chains such as hotels and accommodation which are run on 100% green energy and identifying local providers who follow environmental practices and putting them in contact with production leads.

On Havoc, the sustainability coordinator introduced some innovations to improve the environmental performance of the project:

- **Food waste management:** partnering with an anaerobic digestion plant in the Welsh Valleys to convert food waste into biogas and fertiliser;
- **Energy infrastructure:** installing 100% green energy electric vehicle charging points; and
- **Recycling and reuse:** coordinating the donation of materials and props to a local childcare company, schools, and colleges; and using a local supplier to recycle polystyrene.

As a result of these practices, the production secured research, development, and innovation funding from Clwstwr to enable the Maximising Havoc project—an in-depth study of the sustainable filmmaking techniques used on Havoc to share and embed learnings and systems for future productions.

Building on this success, Severn Screen secured additional funding from Media Cymru to launch a sustainability coordinator training programme, which trained six individuals to support environmentally responsible production practices. Creative Wales-funded industry placements complemented this.

The alignment with the Well-Being of Future Generations (Wales) Act 2015 and wider sustainability goals (UN) has strengthened recognition of the social and environmental responsibilities of production. In particular, Creative Wales funding has contributed to embedding these values in operational practice, helping overcome traditional barriers in the sector, such as tight budgets and the fast-paced nature of production.

7. Case studies

This chapter presents four case studies, drawing together both quantitative and qualitative evidence, to illustrate and explore in greater depth the economic and wider contributions of Creative Wales-funded projects.

7.1. Sex Education, Eleven Films

Sex Education, the multi-award-winning Netflix original series produced by Eleven Films, was one of the first productions to receive support from Creative Wales (under its former Welsh Government structure) in 2018. The production was drawn to Wales not only for the scenic and distinctive landscapes of the Wye Valley in Monmouthshire, but also because of the availability of a skilled and reliable workforce and production infrastructure already present in Wales.

The production team noted that Creative Wales' regional funding was critical in closing a gap in the finance plan, which helped secure the Wye Valley as the primary filming location. This supported Eleven's creative vision of placing the show in a "secret, quirky, mystery location to viewers" while enabling the entire production to remain in Wales.



Creative Wales' support facilitated widespread economic and workforce benefits, with each series achieving greater value for money and providing crew with progression opportunities. This aligns with the production funding guidance, ensuring a better return on investment from returning series. A majority of the crew and freelancers employed were based in Wales, and the production relied heavily on local suppliers, including those in accommodation, catering, transport, kit hire, and equipment. This boosted demand across the regional supply chain.

In total, the combined production spend for seasons three and four was £16.9 million, with Creative Wales contributing £1.0 million, equivalent to 6% of the total. This investment is estimated to have supported £9.6 million in direct and indirect GVA and 170 FTE jobs within Wales. When including induced effects, the total rises to £31.3 million in GVA and 180 FTE jobs.

In addition to direct economic and employment benefits, Sex Education also played a key role in workforce development through a bespoke trainee scheme implemented by Eleven Film. Delivered in partnership with the University of South Wales, the scheme, which sought to expand the Welsh crew base for potential future production in Wales, paired trainees with mentors and followed their progress throughout their time at university. Netflix supported this collaboration through in-person talks and Q&A sessions, raising awareness of industry opportunities among early-career entrants.

Eleven Film also worked with partners, including Sgil Cymru and 6ft From the Spotlight, to access trainees and wellbeing facilitators. Applications were prioritised from

underrepresented groups, including those from lower socio-economic backgrounds and individuals with hidden disabilities. The primary aim of the trainee system was for trainees to enter higher-paid, more skilled positions on completion of the scheme, fully supported by mentors and a healthy production environment.

The trainee scheme aimed to provide a pathway into skilled roles for local talent. According to the production team, many trainees have gone on to secure further work in the Welsh creative industries, contributing to the development of a more sustainable and diverse workforce. This was enabled by the returning series that Creative Wales funding helped facilitate, providing progression opportunities for many trainees and longer-term contracts that fostered greater experience and career development.

The series's cultural impact was also considerable. Sex Education has been widely praised for its inclusive storytelling, with on-screen narratives exploring diverse gender identities, sexualities, and lived experiences. Off-screen, the show has had a notable impact on tourism in the Wye Valley, generating increased interest in its filming locations among domestic and international visitors. With over 20 million global viewers, Sex Education has significantly raised the visibility of rural South Wales on the international stage, contributing to cultural tourism and perceptions of Wales as a distinctive and desirable production destination.

Key Learnings:

- Creative Wales' funding was pivotal in closing a finance gap that secured Wales as the filming location.
- The production delivered substantial local economic benefits, increased value for money for each returning series, and employed Welsh-based crew and freelancers, as well as engaging a wide range of regional suppliers.
- A bespoke trainee scheme, in partnership with the University of South Wales and supported by Netflix, helped build a pipeline of skilled Welsh talent.
- The production actively supported underrepresented groups, including those from lower socio-economic backgrounds and individuals with hidden disabilities.
- The series gained international recognition for its inclusive storytelling, while also boosting tourism in the Wye Valley.

7.2. Willow, Lucasfilm

Based on the 1988 film of the same name, Willow is a fantasy adventure television series produced by Lucasfilm for Disney+. Given the series' genre, Willow's producers sought a location that offered both medieval and fantasy landscapes for filming, as well as nearby high-quality production facilities. Initial scouting had identified several locations in Eastern Europe. However, funding from Creative Wales, combined with the suitability of the location, ensured that producing Willow in Wales would result in both high quality and financial viability.



Support and funding from Creative Wales allowed Lucasfilm to base itself at Dragon Studios in Pencoed for the duration of the production. Creative Wales' funding also ensured that many opportunities to work on Willow were offered to Welsh workers, with 69% of the workforce based in Wales.

Willow's production also supported new entrants into the creative sector, with Lucasfilm's in-house trainee programme enrolling 25 local people to work across each of the departments. Lucasfilm also collaborated with Little People UK, using accessibility coordinators to ensure sets and filming locations were accessible to cast and crew. Welsh businesses also benefited significantly from the production, serving as key primary suppliers to Lucasfilm, especially for set construction, transportation and catering.

In total, Willow's production spend was £51.8 million, with Creative Wales contributing £4.7 million, equivalent to 9% of total spend. This investment is estimated to have supported £31.2 million in direct and indirect GVA and 550 FTE jobs within Wales. When including induced effects, the total rises to £34.5 million in GVA and 580 FTE jobs.

Overall, Lucasfilm were incredibly positive about their experience working with both Creative Wales, Dragon Studios and the wider creative industries across Wales, highlighting their expertise and professionalism. Since Willow, Lucasfilm have used locations across the Bannau Brycheiniog National Park to film scenes for The Acolyte, a Star Wars television series. Many Welsh freelancers have continued to work on other Lucasfilm productions based across the UK, further increasing their exposure and experience within the sector.

Key Learnings:

- Creative Wales funding ensured that producing Willow in Wales would be financially viable and was a factor in the expansion of Dragon Studios.
- Almost three-quarters of the Willow workforce was based in Wales.
- Lucasfilm has continued to use Welsh locations for their work and drawn on Welsh talent for productions across the UK.

7.3. The Pact, Little Door

The Pact is a prime-time drama series commissioned by BBC Wales and produced by Cardiff-based Little Door. As a complex and ambitious Welsh-set drama, the project faced a financing gap in its early stages. Funding from Creative Wales was essential in closing this gap and enabling the series to go into production. The investment completed the financing package, providing the final piece of the funding plan that enabled the producers to unlock co-financing from US studio Lionsgate, secure a strategic partnership with Gorilla TV, and draw down direct equity from Little Door. This ensured the successful delivery of both Series 1 and 2.



The production also helped to build and strengthen key relationships across the Welsh creative industries. Notably, Little Door partnered with Cardiff-based Gorilla TV for post-production, cementing a relationship that led to further collaborations on Series 2 and subsequent projects. A Welsh writer already known to the company was brought into The Pact, gaining new exposure and further embedding local talent into future development work. Lead actress Rakie Ayola returned in Series 2 not only as a performer but also as Executive Producer, illustrating the production's role in developing creative leadership.

The production also supported multiple training and inclusion initiatives, including placements via ScreenSkills, Make a Move, and Ffilm Cymru's Foot in the Door programme. Across both series, trainees gained practical experience across departments such as makeup, sound, and production. The team also delivered workshops in collaboration with the University of South Wales, offering insights into the show's financing and production pipeline. Recruitment for training roles was supported via Culture Connect Wales, helping ensure more diverse representation in the crew.

Along with this, a core principle of The Pact was diversity both on and off screen, in line with Little Door's core values and a testament to the Welsh HoDs at Little Door on The Pact. The series authentically represented Wales by blending urban and rural landscapes and by incorporating bilingual dialogue, with characters using both Welsh and English naturally. This reflected the linguistic reality of life in Wales and contributed to the normalisation of the Welsh language in mainstream television drama.

In terms of cast diversity, a standout feature of the show was the inclusion of a wholly Black Welsh family as the central family in Series 2. The show gave Welsh actress Abbey Hearn the opportunity to take on her first major role after graduating from the Royal Welsh College of Music and Drama. This role allowed her to act alongside diverse talent, including other Black and mixed-race actors, in a Welsh-based drama, contributing to the broader representation of underrepresented voices in Welsh television.

The filming continued for 145 days across Wales for Seasons 1 and 2 of The Pact, with Welsh crew comprising between 79% and 87% of the production workforce. The combined production spend for both seasons totalled £12.6 million, of which Creative Wales

contributed £1.0 million, equivalent to 8% of total spend. This investment is estimated to have supported £6.7 million in direct and indirect GVA and 120 FTE jobs within Wales. When including induced effects, the total rises to £7.4 million in GVA and 130 FTE jobs.

Although geographic data covers approximately 66% of spend due to data quality limitations, it indicates that 75% of production expenditure occurred in Cardiff, where Little Door is based. The remaining 25% was distributed across 11 other local authorities in Wales, with Rhondda Cynon Taf (11%), the Vale of Glamorgan (4%), and Caerphilly (2%) receiving notable shares. Additional areas, including Bridgend, Newport, and Carmarthenshire, also benefited from localised spend. This spatial pattern highlights the production's role in supporting Cardiff's established creative cluster while also contributing to the wider regional economy across South Wales.

Key Learnings:

- Creative Wales funding was essential for closing the financing gap on this project.
- The production also helped to build and strengthen key relationships across the Welsh creative industries.
- The production has become an effective platform for inclusive talent development by integrating training programmes and partnerships that offer inclusive access to practical sector experience.
- The production consciously showcased a diverse Wales.

7.4. Ty Gwydr/The Greenhouse, Little Bird

Ty Gwydr is a six-part Welsh-language reality TV series commissioned by S4C and produced by Little Bird. Targeted at a Generation Z audience, the show combines entertainment with environmental themes, delivering an 'eco-crime' storyline in each episode. Creative Wales' funding enabled Little Bird to produce its first-ever reality-style TV format, expanding both the company's creative portfolio and production capability.



Creative Wales funding played a critical role in ensuring the safe delivery of the production. According to the production lead, the funding enabled the recruitment of sufficient crew, thereby avoiding reliance on a skeleton crew. This was essential for meeting health and safety requirements, particularly given the challenges of filming in the remote locations of Hidden Valley Yurts and Lake House in Chepstow. The production generated direct economic benefits for the area through location fees and supplier partnerships. These included working with a local woollen weaving group and an outdoor adventure company, which provided bespoke rafts and equipment for scenes filmed on a nearby lake.

In total, Ty Gwydr's production spend was £372,000, with Creative Wales contributing £62,000, equivalent to 17% of the total. This investment is estimated to have supported £185,000 in direct and indirect GVA and 4 FTE jobs within Wales. When including induced effects, the total rises to £206,000 in GVA.

Although geographic data covers approximately 85% of spend due to data quality limitations, it indicates that 44% of production expenditure occurred in Cardiff, where Little Bird is headquartered. The remaining 56% was distributed across 12 other local authorities in Wales, with the Vale of Glamorgan (17%), Gwynedd (11%), and Carmarthenshire (9%) receiving notable shares. This spatial footprint demonstrates how relatively small-scale productions can deliver wide-ranging economic value across multiple regions of Wales, particularly in rural and semi-rural settings.

The project also introduced new ways of working. A wellbeing facilitator, funded through CULT Cymru, was embedded into the production, helping raise awareness of wellbeing roles among both crew and contributors. Following the experience, Little Bird confirmed plans to use a wellbeing facilitator on future projects. The production also provided training opportunities, bringing new crew into the fold, including a local crew member the company intends to rehire, and gave the director their first opportunity to work on Welsh reality television.

For on-screen contributors, Ty Gwydr helped raise profiles via S4C's Hansh platform. Behind the camera, the production provided meaningful creative input opportunities for the crew, including close collaboration with the series director. The experience gained was especially valuable for those entering or transitioning into the reality TV genre.

Sustainability was a core theme of the series and the production itself. Little Bird, known for its environmentally conscious values, used the show to promote greener behaviours through storylines and production practices. Alongside its sister company Green Wing, Little Bird is developing a carbon footprint management app for production companies, informed in part by their work on Ty Gwydr.

Overall, Ty Gwydr represents a successful example of Creative Wales funding enabling innovation in Welsh-language content, supporting the development of new production genres, and embedding sustainable practices and wellbeing principles into delivery. The series helped grow sectoral capacity in both creative and operational areas while contributing to the visibility of Welsh culture and environmental awareness on screen.

Key Learnings:

- Creative Wales funding supported the safe delivery of a new production genre.
- The project also introduced new ways of working by embedding a wellbeing facilitator, which set a precedent for future productions.
- Environmental themes were core to both the storyline and production practices, which have informed the development of a carbon footprint management app for production companies.

8. Context review

This chapter summarises the wider socioeconomic and industry context in which the Creative Wales Production Funding programme has operated since its inception in 2020. It explores the ongoing economic effects arising from external factors such as the COVID-19 pandemic, the cost-of-living crisis, and the UK's exit from the EU, assessing how these have influenced both the delivery of funded productions and their broader economic outcomes. The purpose is to provide a wider understanding and baseline against which the programme's impacts can be understood and assessed.

8.1. Britain's exit from the European Union

After the UK formally left the European Union (EU), the UK and EU signed the Trade and Cooperation Agreement on the 31st December 2020. The deal does not allow the UK the same liberties it had as a member state, which has had ramifications for businesses, including on recruitment (end of freedom of movement).

Due to the reliance on freelancers by the creative industries, Brexit has had a disproportionately negative impact on the industries' ability to hire foreign talent due to the new barriers to the single market. Ending the free movement of workers, stricter visa policies, and a more complex migration system have increased the cost and difficulty for the UK creative industries to hire EU workers, leading to a reduction in the number of EU workers they employ⁴⁶.

Several stakeholders, including production leads (n=7), highlighted that the increased administration and associated fees have led to higher costs for recruiting freelancers and crew members, and for transporting kit and equipment from the EU. These bureaucratic burdens may decrease if agreement on a potential UK-EU mobility scheme is reached⁴⁷.

8.2. The COVID-19 pandemic

The COVID-19 pandemic had a significant impact on the creative industries, particularly in sectors reliant on physical workplaces, specialist equipment, and collaborative environments such as film and television production. Many stakeholders (n=13) highlighted that restrictions on movement and workplace access, along with health and safety constraints and increased contingency costs, led to widespread disruption and, in many cases, the cessation of filming activity altogether.

Between Q4 2019 and Q2 2021, output across the UK's creative industries contracted by 37% in real terms⁴⁸. This sharp reduction in production activity significantly reduced the availability of work, resulting in widespread income and employment losses for freelancers and crew members, who represent a substantial proportion of the sector's workforce. This

⁴⁶ [Post-Brexit migration and accessing foreign talent in the Creative Industries](#), Creative Industries Policy & Evidence Centre, 2023

⁴⁷ [News Story- New Agreement with EU to benefit British People, 2025](#)

⁴⁸ [Impact of government policy on the creative sector, 2021](#)

contributed to a 13% fall in GVA between 2019 and 2020 in the UK film, TV, radio and photography sub-sector⁴⁹.

8.3. Inflationary pressures

The Bank of England has reported that the reopening of global economies following the COVID-19 pandemic led to rising energy prices and the early onset of inflationary pressures⁵⁰. These were particularly acute in sectors such as food, raw materials, and agricultural products, with UK inflation peaking at 11.1% in the 12 months to October 2022⁵¹.

Many stakeholders (n=10) consulted in this study consistently highlighted ongoing financial pressures stemming from the pandemic, Brexit, and the broader cost-of-living crisis. Elevated production costs persist, particularly for inputs such as equipment, insurance, location hire, accommodation, fuel, and crew rates. Stakeholders specifically noted sustained budget constraints due to rising overheads and higher borrowing costs, exacerbated by higher interest rates. This has resulted in tighter production budgets, smaller crew sizes, adjustments in filming locations to reduce expenditure, and a general scaling back of more ambitious or costly project elements. Moreover, stakeholders linked these sustained cost increases directly to declining commissioning activity, noting that production budgets have not returned to pre-pandemic norms.

Inflationary pressures have also created significant access barriers for individuals looking to enter or remain in the creative industries. Rising living costs have made it increasingly difficult for early-career professionals, particularly freelancers and those in training roles, to sustain themselves in low-paid or unpaid entry-level positions⁵². A report by Creative Access (2023) found that 82% of current or aspiring workers in the creative industries cited the cost-of-living crisis as a significant barrier to accessing or progressing in the sector⁵³.

8.4. Evolving market and consumption of TV and Film

The UK film and TV industry responded strongly to the COVID-19 pandemic in 2021, with record production investment reaching £5.6bn⁵⁴. In Wales, Creative Wales supported the return to production through its investment in War of the Worlds Season 2, which became the first high-end TV drama to begin filming under the new COVID-19 safety guidelines established by the British Film Commission. Creative Wales also helped to shape these important guidelines, ensuring they were fit for purpose for productions filming in Wales.

This growth was driven in part by a surge in demand for content across both domestic and international markets following a production pause during the COVID-19 pandemic. However, since late 2022, many stakeholders have reported (n=7) significant industry

⁴⁹ [University of Birmingham, The economic impact of COVID-19 on the creative industries, 2023](#)

⁵⁰ [UK inflation since the pandemic: How did we get here and where are we going?, Speech by Jonathan Haskel, 2023](#)

⁵¹ Ibid.

⁵² [Creative Mentor Network, The Cost of the Cost of Living on Creativity](#)

⁵³ [Significant Cost Barrier in Creative Industries, 2023](#)

⁵⁴ [The Guardian News Article, UK film and TV industry bounces back from Covid with record £5.6bn spend](#)

instability characterised by declining commissioning volumes, increased market fragmentation, and heightened economic uncertainty.

Viewing habits have increasingly moved from linear broadcast schedules to on-demand, subscription-based streaming platforms such as Netflix, Amazon Prime Video and Disney+. Watching on scheduled TV channels is forecast to drop from 67% of total long-form TV viewing in 2022 to 35% by 2034 and 27% by 2040⁵⁵. This shift has also led to discussions among terrestrial broadcasters about further developing their own on-demand offers⁵⁶. Broadcasters began to face increasing financial pressure, partly due to declining audience share and a broader fragmentation of advertising revenue, as advertisers diverted spend to social and digital platforms such as YouTube and TikTok. These pressures contributed to a decline in commissioning activity by terrestrial broadcasters from late 2022 into 2023, with scripted TV commissions falling by 18% in 2023⁵⁷. Stakeholders noted that reduced commissioning volumes have disproportionately impacted mid-sized, regionally focused, or experimental projects, especially those from independent UK producers, as commissioners increasingly prioritise high-end dramas with internationally recognisable talent aimed at global audiences.

Compounding the issue, the industry had over-commissioned during the post-pandemic boom, anticipating sustained high demand. When market demand began to plateau and fragment, the industry underwent a sharp correction. Commissioners responded by prioritising high-end dramas featuring internationally recognisable talent to attract global consumers. This was a commercially driven shift that has narrowed opportunities for mid-sized, regionally focused or experimental projects, particularly those led by independent UK producers.

This evolving landscape has had a direct impact on the freelance workforce, which comprises a substantial proportion of employment in the screen sector. Falling commissioning volumes and rising production costs have resulted in job losses, reduced work opportunities, and growing precarity for freelancers⁵⁸, especially those working on one-off or smaller-scale productions or those typically supported by independent and terrestrial broadcasters.

A further trend is the growth of extended reality, such as augmented or virtual reality (AR, VR), and its increasing pervasiveness in the experience economy. This challenges traditional TV models and impacts the costs of developing new content due to the high levels of investment in R&D required, as well as the increasingly specialised skills required. As a result, people with new and evolving skill sets will enter the industry in the coming years.⁵⁹

⁵⁵ [Ofcom Report: Future of TV Distribution, 2023.](#)

⁵⁶ [BBC News Article: How can traditional British TV survive the US streaming giants? 2025](#)

⁵⁷ [How the BBC is defying a UK commissioning downturn, 2024.](#)

⁵⁸ [Forging Freelance Futures Report](#)

⁵⁹ [Gensler Research Institute and The Immersive Experience Institute: Evolving Immersive: The 2025 Immersive Entertainment and Culture Industry Report](#)

8.5. US Writers Guild of America and SAG AFTRA strikes

In 2023, the Writers Guild of America (WGA) and the Screen Actors Guild – American Federation of Television and Radio Artists (SAG-AFTRA) went on strike over concerns about pay, streaming residuals, and the potential impact of artificial intelligence on creative professions. Writers in particular highlighted the challenges posed by shorter series formats and fewer repeat commissions on streaming platforms, which have contributed to lower overall earnings and fewer long-term employment opportunities.

Several stakeholders (n=5) consulted for this study emphasised that these strikes intensified existing instability in the sector, exacerbating financial uncertainty and significantly reducing commissioning activity. Respondents noted that the industrial action coincided with broader economic pressures, including inflation and Brexit-related disruptions, collectively creating a ‘double whammy’ of market contraction. While two stakeholders reported being relatively insulated due to their specific market positions or local connections, others experienced significant delays, increased budgetary pressures, and overall reduced opportunities.

The strikers drew attention to the precarity of employment in the screen sector, which is heavily dependent on freelance workers and project-based work. Many workers face income uncertainty, with periods of intense activity followed by extended gaps in employment⁶⁰. The industrial action had knock-on effects in the UK, bringing global production to a standstill and delaying the release of several high-profile movies⁶¹. This further impacted the precarity of employment for already vulnerable UK film and TV freelancers until November 2023, when the strikes ended. However, by shifting the focus to prioritise Welsh stories and content during this particularly challenging period, Wales retained a strong pipeline.

8.6. Responses and support from Creative Wales

Some stakeholders (n=4) emphasised the critical role played by Creative Wales in responding effectively to external economic pressures, particularly those related to the COVID-19 pandemic. Stakeholders specifically noted Creative Wales’ responsiveness in swiftly addressing the financial burden of COVID-related safety protocols, enabling productions to continue despite escalating costs.

However, two stakeholders highlighted structural limitations in Creative Wales’ funding model, noting that because the organisation typically provides supplementary rather than full production funding, it has not been able to fully offset commissioning reductions or address the substantial budget constraints faced by production companies. While this reflects broader challenges in the market, it is important to recognise that Creative Wales is not intended to underwrite full production budgets, but rather to act as a strategic co-investor supporting projects with strong potential impact. Further, the timing of Creative Wales’ financial support, typically disbursed post-production, has created additional

⁶⁰ [British film and high-end television](#)

⁶¹ [The Guardian News Article: Already vulnerable’: UK film and TV workers feel the pinch from US strike, 2023](#)

pressures for some companies, requiring interim financing arrangements that incur higher borrowing costs.

8.7. Economic context of the creative industries sector

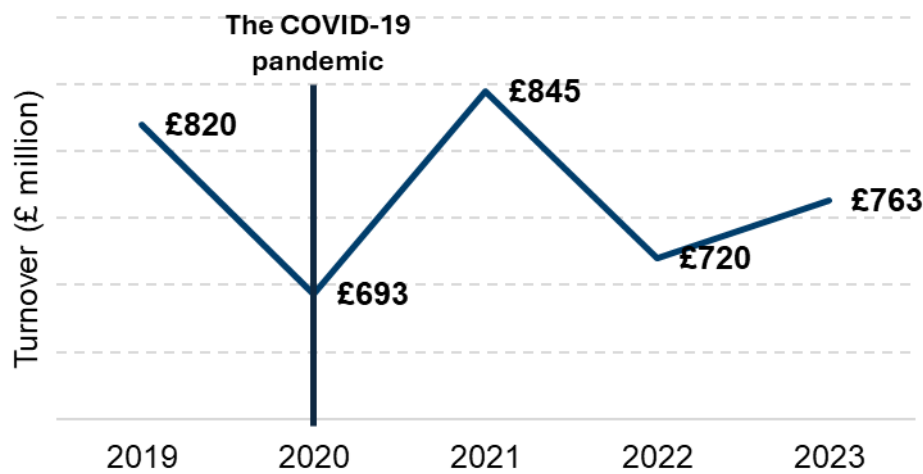
This sub-section provides an overview of the economic contribution of the creative industries in Wales. It presents key indicators to contextualise the sector’s development during a period marked by significant structural and external challenges. These insights provide a reference point for interpreting the Creative Wales Production Funding programme’s impacts on the sector and the wider economy, as assessed in the rest of the report.

Due to data availability, only some variables are available using the Creative Wales definition of the creative sector. Where the data is unavailable, for example, GVA, the creative industries Department for Culture, Media & Sport (DCMS) creative industries subsector definition is used, which encompasses all creative occupations within film, TV, video, radio and photography⁶².

8.7.1. Turnover

The digital and screen sectors in Wales turned over £763 million in 2023, accounting for 50% of the total turnover in Wales’ creative industries⁶³. This has fallen by 7% since 2019, when the digital and screen sub-sectors turned over £820 million⁶⁴.

Figure 8.1: Turnover (£ million) of digital and screen sub-sectors, 2019 to 2023



Source: Welsh Government, 2024, Welsh Creative Industries Sector Economic and Labour Market Statistics, 2018 to 2023

While the number of businesses in the digital and screen subsectors increased from 1,495 to 1,710 between 2019 and 2023⁶⁵, the reduction in total turnover for the two subsectors

⁶² Department for Culture, Media & Sport: Creative Industries Economic Estimates

⁶³ Welsh Government, ‘Welsh Creative Industry Sector Economic and Labour Market Statistics, 2018 to 2023’, 29 October 2024

⁶⁴ Ibid.

⁶⁵ Ibid.

indicates that average turnover per business has decreased between 2019 and 2023. This may be indicative of the market downturn, leading to lower turnover per business due to reduced commissioning by terrestrial broadcasters and market fragmentation from lower advertising revenue opportunities.

8.7.2. Gross value added (GVA)

In 2023, the creative industries contributed an estimated £1.23 billion in GVA to the Welsh economy, accounting for 1.5% of total GVA in Wales⁶⁶. This reflects a 14% increase since 2019, when the sector's GVA stood at £1.1 billion. For comparison, the creative industries accounted for 2.9% of total GVA in Scotland and 5.7% across the UK in 2022.

The subsector relevant to Creative Wales (film, TV, video, radio and photography) generated £405 million in GVA in 2023⁶⁷. This subsector accounted for 33% of total GVA from the creative industries in Wales, as defined by DCMS in 2023, up from 31% in 2019. The subsector accounted for 72% of the creative industries as defined by Creative Wales⁶⁸ in 2023, up from 62% in 2019.

8.7.3. Jobs

There are an estimated 16,900 people employed within the digital and screen subsectors in Wales in 2023, comprising 48% of employment in the creative industries sector⁶⁹. The number of people employed in the digital and screen sub-sectors has increased by 16% between 2019 and 2023⁷⁰.

In terms of workforce composition, 35% of those employed in the digital and screen subsectors were self-employed in 2021, whereas across Wales, self-employed people made up 12% of those in employment⁷¹. Across the whole of the creative industries in Wales, the self-employed make up 48% of the workforce, a proportion that has marginally declined since 2019, when it comprised 51% of employment in the industry. However, it is important to note that these figures are derived from the ONS' Annual Population Survey, which does not capture freelancers working on short-term contracts or project-based roles unless they self-identify as self-employed. As a result, official statistics are likely to underestimate the full scale of freelance working within the sector. Clwstwr's recent report on the size and composition of the creative industries in Wales reports that freelancers could make up close to 50% of the workforce⁷².

⁶⁶ DCMS, '[DCMS Sector Economic Estimates: Regional Gross Value Added 2023](#)', 3 July 2025

⁶⁷ [DCMS Sectors Economic Estimates: Regional GVA 2023 - GOV.UK](#)

⁶⁸ This includes: Film, TV, video, radio and photography, publishing, and music, performing and visual arts.

⁶⁹ Welsh Government, '[Welsh Creative Industry Sector Economic and Labour Market Statistics, 2018 to 2023](#)', 29 October 2024

⁷⁰ Ibid.

⁷¹ Welsh Government, '[Welsh Creative Industry Sector Economic and Labour Market Statistics, 2018 to 2023](#)', 29 October 2024

⁷² Clwstwr, '[Report Update: The Size and Composition of the Creative Industries in Wales in 2022](#)', July 2023

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Annexe A: Stakeholder List

Organisation	Role
Lupus Films	Joint Managing Director
Bad Wolf	Chief Operating Officer
Mad As Birds	Production Lead
Cwmni Da	Business Affairs Manager
Triongl / Duchess Productions	Managing Director
Yeti	Creative Director
Little Door	Co-Owner
Duck Soup Films	Producer
Boom Cymru	Finance Director
Bumpybox	Producer and Co-Director
BBC Studios	Head of Production for Comedy
Quay Street Productions	Chief Operating Officer
Playground Entertainment	Director
Playground Entertainment	Production Executive
Telesgop	Chairman
Lucasfilm	Production Executive
Little Bird	Creative Director
Eleven Films	Director of Production
Gorilla	
Screen Alliance Wales	Managing Director
Screen Alliance Wales	Education and Training Manager
TAC	General Manager
TAC	TAC Chair
British Film Commission	Head of Production UK

6ft From the Spotlight

Severn Screen

Freelance

Freelance

Wellbeing Coordinator

Sustainability Coordinator

Sgil Cyrmu Apprentice

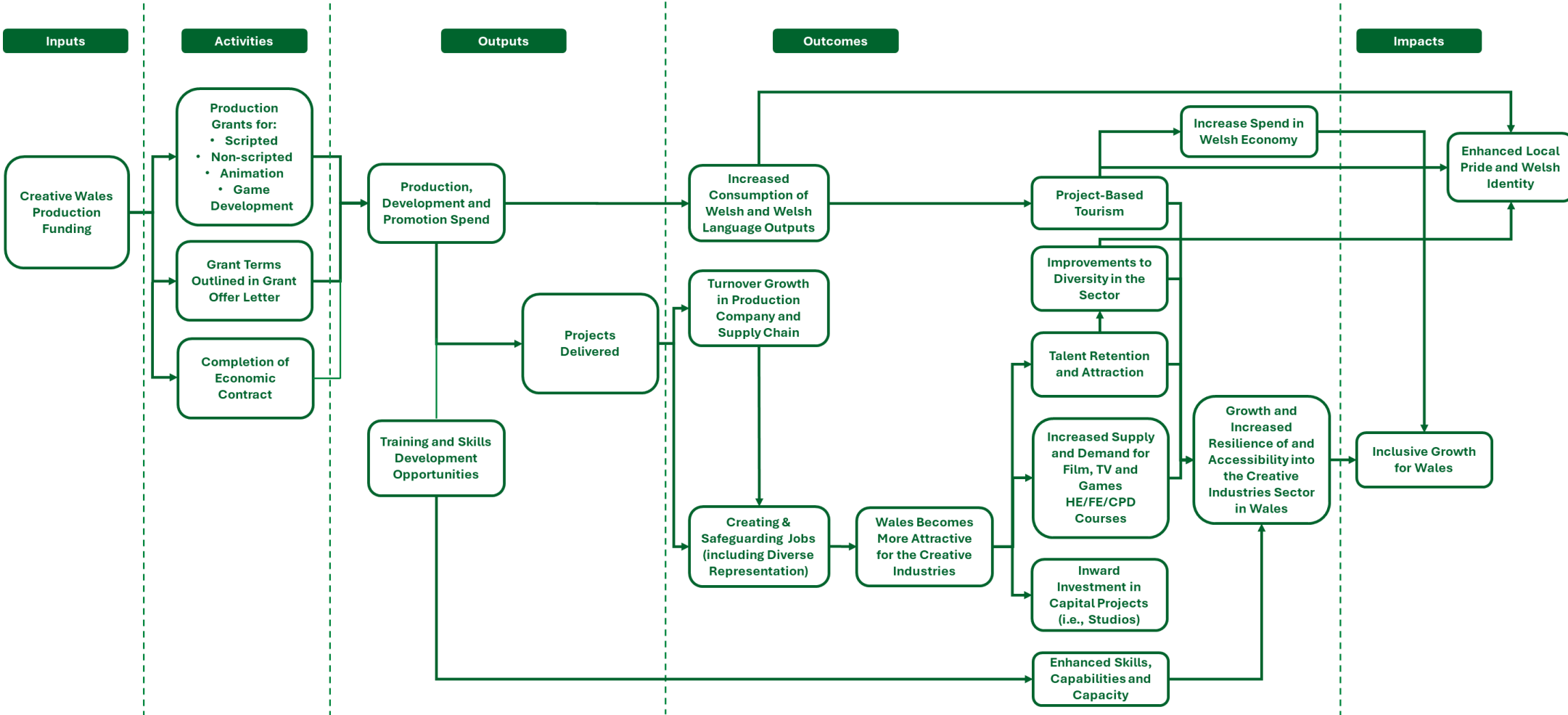
Sgil Cyrmu Apprentice

Sgil Cyrmu Apprentice

Location Manager

Line Producer

Annexe B: Creative Wales Production Funding Theory of Change Model



Annexe C: Detailed Methodology

Theory of change

The Theory of Change provides the foundation for a theory-based evaluation. It sets out a logical framework describing how programme activities, such as production funding, are expected to lead to short-, medium-, and long-term outcomes.

The ToC was developed iteratively during the early stages of the assessment and has been informed by stakeholder consultations and early evidence gathering; existing policy documents and programme objectives; and a review of comparable studies in the creative industries.

The ToC is used as a testing framework throughout the evaluation, providing a structure against which evidence is mapped and causal pathways are interrogated. This enables the assessment to go beyond simple output measurement and to explore the extent to which Creative Wales funding contributes to wider public value.

Tasks undertaken for this assessment

A range of research activities were undertaken to inform the assessment of Creative Wales' production funding programme. These tasks are summarised below:

Review and analysis of monitoring data and reports

The assessment included a detailed review of monitoring information, reporting documents, and contract materials provided by Creative Wales. This comprised:

- **Thematic analysis of 24 economic contracts** between the Welsh Government and beneficiary production companies. These contracts required recipients to set out current activities and future commitments across four thematic areas: Economic Strength and Adaptability, Fair Work, Promotion of Well-being, and Low Carbon and Climate Resilience. This analysis helped identify recurring commitments to wider social and economic outcomes. Alignment with the Welsh Government's priorities is essential for companies to apply for and access Welsh Government funding.
- Compilation and analysis of production spend data submitted by 37 of the 45 supported productions in scope. This data informed the economic impact model and included:
 - 16 returns, which provided total spend by category across the lifetime of the production, varied in detail from summaries of spend by department to broad spend categories.
 - 21 returns, which provided details on every transaction that occurred during the production's lifetime.

These data sources formed the quantitative foundation of the I-O modelling set out in Chapter 4.

Stakeholder interviews

Between October 2024 and April 2025, 35 semi-structured interviews were conducted with stakeholders across the screen and digital media sectors, including:

- Five **members of the Creative Wales team** involved in programme delivery and management;
- Six **sector stakeholders**, including representatives from the independent production sector, British Film Council, Screen Alliance Wales, and a Cardiff-based post-production house;
- Seventeen **production company leads** from projects in receipt of Creative Wales funding (out of a total of 35); and
- Seven **freelancers, crew members, or trainees** who worked on one or more Creative Wales-funded productions.

These interviews explored stakeholder perspectives on the economic, social, cultural (including the Welsh language), and environmental impacts of production funding, particularly on individuals, businesses, communities, and the sector more broadly.

Literature review

A targeted review of academic and policy literature was undertaken to situate the findings within the wider evidence base. This included recent evaluations of screen funding schemes in the UK, studies on screen tourism and economic multipliers, and academic literature on the wider effects of the screen and digital sector.

National datasets and statistical sources

Relevant datasets were drawn upon to benchmark and contextualise the analysis, including:

- Office for National Statistics (ONS): such as Business Register and Employment Survey (BRES) and UK Business Count (ABS);
- Welsh Government Statistics: including GVA and Tourism Performance for Wales;
- Creative sector datasets: DCMS Sector Economic Estimates and Welsh Creative Industry Sector Economic and Labour Market Statistics.

These sources were used to validate modelling assumptions, estimate baseline conditions, and benchmark the contribution of Creative Wales-funded activity relative to the wider economy.

Methodology for this assessment

Economic value framework and scope

This assessment adopts an economic value framework that recognises the diverse mechanisms through which Creative Wales-funded productions generate economic impact.

These include both direct outputs, such as production spend and employment, and wider effects relating to infrastructure development, screen tourism, and skills investment.

To ensure transparency and methodological rigour, each potential value pathway was assessed against three criteria:

- **Attribution:** can the value be reasonably linked to Creative Wales funding?;
- **Data availability:** are reliable data available to support quantitative estimation?
- **Methodological alignment:** does the proposed measurement approach align with HM Treasury Green Book principles, accepted industry standards and or underpinned by literature?

The following value categories were included in scope for quantitative assessment:

- **Production and development spend:** expenditure by production companies on suppliers and services located in Wales;
- **Supply chain effects:** indirect economic activity generated through procurement from Welsh businesses;
- **Salary expenditure:** additional economic activity arising from income earned by workers and subsequently spent in the local economy;
- **Studio and infrastructure investment:** economic contributions linked to capital investment in production facilities with a demonstrable link to Creative Wales funding;
- **Screen-induced tourism:** visitor spending linked to the visibility of Welsh screen content in domestic or international markets;
- **Skills development and training:** economic and social value generated through apprenticeships, trainee placements, and targeted talent development;
- **Cinema exhibition and film festivals:** operational spend by festivals and cinemas, and associated visitor expenditure linked to Creative Wales-supported projects.

Several potential value areas were excluded from quantitative modelling, either due to insufficient data or limited attribution to Creative Wales funding, including:

- **Production distribution (including marketing and promotion) and broadcasting,** where financial data were not systematically available and the attribution of downstream economic effects to Creative Wales funding could not be reliably established;
- **Production company profits or commercial returns** (including leveraging intellectual property rights, see Section 5.1 for more information) and employment, where data were unavailable or self-reported and not consistently verifiable;

- **Higher and further education (HE/FE) course-related expenditure**, due to the difficulty in linking this spend to specific Creative Wales interventions; and
- **Retail merchandising impacts**⁷³, including music, fashion, or publishing revenues linked to Creative Wales-supported productions, where there was limited evidence of benefit to Welsh-based retailers.

Where relevant, these exclusions have been addressed qualitatively elsewhere in the report. This approach ensures that the economic assessment remains evidence-led, conservative in its estimate, and aligned with best practice in public value evaluation.

Economic impact scope

This assessment defines economic value in two principal terms:

- **Employment supported by financial year**: measured as the number of FTE jobs, including paid trainee placements, required to deliver Creative Wales-funded productions and meet associated goods and services demand; and
- **GVA**: a measure of the economic output generated through production activity, calculated as the difference between output and intermediate consumption.

In addition to GVA and employment, the economic modelling assesses a range of related indicators within the wider economic value framework, including:

- **Spend**: total production-related expenditure retained within Wales, assessed in terms of:
 - **direct spend**, which includes immediate payments to suppliers and staff;
 - **indirect spend**, which captures the secondary economic activity generated through supply chain purchases made by those suppliers; and
 - **induced spend**, which refers to household re-spending of wages earned by individuals employed directly or indirectly through production activity;
- **Return on investment (RoI)**: defined as the amount of attributable economic value (GVA) generated in Wales for every £1 of Creative Wales' production funding invested; and
- **Tax revenues**: public sector revenues generated through employment, supplier transactions, and re-spending effects;
- **Carbon emissions**: modelled estimates of CO₂e emissions;

⁷³ <https://www.citma.org.uk/resources/reaching-for-the-stars-how-merchandising-became-the-film-industry-s-golden-ticket-blog.html#:~:text=Consumers'%20demand%20for%20merchandise%20has,the%20merchandise%20related%20to%20it.>

- **Economic multipliers:** measured as the ratio of total (direct, indirect, and induced) impact to direct impact, providing insight into the wider effects of production activity.

ROI and multiplier effects are also analysed by production type, including breakdowns by:

- **Commissioning model:** single series versus recommissioned projects;
- **Production origin:** indigenous, co-production, or inward investment;
- **Genre:** e.g. scripted, unscripted, animation, or games; and
- **Language:** projects produced in the Welsh language.

Other key modelling parameters and considerations include:

- **Time period of assessment:** the analysis covers activity from 2020–21 (the start of Creative Wales production funding) to the beginning of 2025, with all financial values presented in 2024/25 prices;
- **Forecasted impacts:** for the 12 projects still in delivery at the time of the study's commission (i.e. funded in 2024/25) or for which Welsh Government had not yet verified claims and no detailed spend form was provided to Wavehill, economic impacts have been modelled separately using projected Welsh spend figures submitted to the Welsh Government at the time of funding approval; and
- **Quality of spend:** a distinction is made between ATL costs, such as fees for senior creative roles, and BTL delivery and operational costs. The analysis includes both categories where data are available, drawing on a mix of submitted claims data and modelling assumptions.

Impact modelling

The economic impact modelling undertaken for this assessment draws on a combination of administrative data from Creative Wales and official statistics on the Welsh economy.

The impacts were calculated using the I-O tables for Wales, reflecting the state of the economy in 2019, published by the Welsh Government in March 2025. The tables provide the basis for a macroeconomic model for Wales showing how the resources provided by Creative Wales sustain turnover, GVA and income (wages). The tables were supplemented with employment data from the Business Register and Employment Survey (BRES).

The impacts presented show the direct effects of turnover, GVA, income and employment sustained by organisations supported by Creative Wales, as well as the indirect impacts created through the creative sector supply chains. The macroeconomic impact for Wales also shows induced effects, with wages paid to employees spent on the high street creating further economic output and jobs in communities across Wales.

The model was extended using data from the tables to show the impacts on some taxes not captured within the GVA estimates. The fiscal impact analysis focused on taxes on production (e.g., VAT) and income tax. Due to data limitations, corporation tax, national

insurance and other indirect taxes have not been estimated, so the figures presented are likely conservative. The model was further supplemented by carbon data drawn from the Office for National Statistics (ONS) Environmental Accounts.

Note: Before the release of Wales-specific IO tables in March 2025, the most recent publicly available set was from 2007. As a result, the industry standard in recent years has been to use IO tables from other UK nations, most commonly those produced by the ONS for the UK and by the Scottish Government, as a proxy when modelling economic impacts in Wales. This report is one of the first to apply the newly published Wales IO tables to an impact assessment and sets a precedent for more locally representative modelling going forward.

Initial comparisons reveal marked differences between the Welsh, UK, and Scottish IO multipliers for the film and television sectors (IO categories 59 and 60). Specifically, the Welsh IO tables indicate that, for every £1 of production expenditure, the industry generates approximately £0.21 in GVA, compared to £0.38 using UK multipliers⁷⁴ and £0.46 using Scottish multipliers⁷⁵. This reflects higher levels of leakage, a greater proportion of imported goods and services, and a smaller share of retained value within the Welsh economy.

Identification and assessment of wider outcomes

Chapters 5 and 6 of this report examine the wider economic, social, cultural, and environmental outcomes associated with Creative Wales' production funding. Given the nature of these outcomes, much of the supporting evidence is qualitative, although quantitative estimates have been included where feasible.

This part of the assessment draws on a broad range of primary and secondary evidence sources, including interviews, monitoring data, case studies, and existing literature, collected through the research tasks outlined in Section 2.3, to enhance the credibility and robustness of the conclusions presented.

⁷⁴<https://www.ons.gov.uk/economy/nationalaccounts/supplyandusetales/datasets/inputoutputsupplyandusetales>

⁷⁵<https://www.gov.scot/publications/input-output-latest/>

Annexe D: Inflating Prices

All financial figures presented in this report have been inflated to 2024/25 prices using HM Treasury GDP Deflators (March 2025)⁷⁶. This approach ensures comparability across projects funded in different years and provides a transparent basis for assessing the real value of production funding over time. The deflator applied reflects the annual percentage change in the GDP price index, as published by HM Treasury.

Figures are adjusted to account for changes in the value of money due to inflation, enabling stakeholders to understand the true purchasing power and impact of funding allocations. This adjustment is standard practice in public sector economic analysis and aligns with HM Treasury Green Book guidance⁷⁷.

The table below provides a breakdown of the funding awarded (and, where unavailable, Creative Wales' Offer based on their Award Letter) to each production in current prices, alongside the corresponding inflated figure for 2024/25.

Table A.1: Studios based in Wales used as part of Creative Wales-funded productions

Project Name	Awarded funding in current prices (£)	Awarded funding in 2024/25 prices (£)
Sex Education S3	£432,178	£505,491
War of the Worlds S2	£750,000	£877,227
Roald and Beatrix: Tail of the Curious Mouse	£224,674	£262,787
Wonders of the Celtic Deep	£77,000	£90,062
Kensuke's Kingdom	£100,000	£117,651
The Rubbish World of Dave Spud S2	£140,000	£163,749
His Dark Materials S3	£2,000,000	£2,339,273
Willow	£4,000,000	£4,678,545
The Pact S1	£576,574	£678,345
Havoc	£2,042,500	£2,403,022
Jamie Johnson S6&7	£335,000	£394,131
The Almond and the Seahorse	£91,000	£107,062
Rain: The Untold Story (aka Rain Stories)	£30,258	£35,599
Y Golau / The Light in the Hall	£463,003	£508,834
Sex Education S4	£450,000	£494,543
Wolf	£500,000	£549,493
The Pact S2	£330,000	£362,665
The Truth About My Murder	£25,000	£27,475
American Doomsday / Super Volcano	£53,900	£59,235

⁷⁶ [GDP deflators at market prices, and money GDP - GOV.UK](#)

⁷⁷ [The Green Book \(2022\) - GOV.UK](#)

Project Name	Awarded funding in current prices (£)	Awarded funding in 2024/25 prices (£)
Black Cake	£750,000	£824,239
4 Stories: On the Edge S4	£65,000	£71,434
Un Nos ola o Leuda/One Moonlit Night	£119,931	£131,802
Steeltown Murders	£370,040	£370,040
Newffion	£32,920	£34,171
Pren ar a Bryn / Tree on a Hill	£500,000	£519,004
The Way	£510,000	£510,000
Lost Boys and Fairies	£429,000	£445,306
Creisis	£165,113	£181,457
Until I Kill You / aka Delia Balmer	£200,000	£207,602
The Rubbish World of Dave Spud S3	£120,000	£131,878
Men Up	£150,000	£155,701
House of the Dragon S2	£493,104	£511,846
Out There	£310,000	£321,783
Ty Gwydr / The Greenhouse	£60,202	£62,490
Cleddau / The One That Got Away	£270,000	£270,000
Maid of Sker 2	£150,000	£150,000
World's Biggest Cruise	£14,024	£14,024
Minibuds	£130,000	£130,000
Death Valley	£400,000	£400,000
Hafiach	£90,000	£90,000
The Guest (aka Let Me In)	£415,046	£415,046
The Undeclared War S2	£500,000	£500,000
All the Burtons	£35,000	£35,000
The Peace Particle	£30,000	£30,000
Young Sherlock	£2,500,000	£2,500,000

Source: Monitoring information