Screen Survey Wales 2021

University of South Wales
Prifysgol De Cymru

Ariennir yn Rhannol gan
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Creative Wales

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S4C: Yr Egin

Background to this Report

This report is produced by the University of South Wales with Creative Wales. It consciously aims to elevate the visibility of the film and TV production sector beyond the Cardiff Capital Region[1] (CCR), recognising that growth in this sector matters to the nation's whole economy. The screen sector in Wales is not limited to the Cardiff Capital Region. Screen Survey Wales 2021 maps some of the specific characteristics of the regional microclusters in west and north Wales and provides evidence of the specific challenges and opportunities facing firms, workers and learners in these regional screen economies.

[1] The Cardiff Capital Region (CCR) includes the 10 local authority areas in south east Wales – Blaenau Gwent; Bridgend; Caerphilly; Cardiff; Merthyr Tydfil; Monmouthshire; Rhondda Cynon Taf; Torfaen and Vale of Glamorgan.

About This Report

In January 2021 The University of South Wales published, Screen Work 2020 | Clwstwr, a detailed mapping of the wider screen sector in the CCR supported by funding from the Arts and Humanities Research Council accessed through Clwstwr. This report is freely available in English and Welsh from the Clwstwr website[2].

Screen Survey Wales 2021 significantly extends the geographic reach of our earlier mapping of the Cardiff Capital Region screen sector. The entirety of the research gathered in Screen Survey Wales was conducted during 2021, with data collection focussed on spring and summer when film and TV production was getting up and running after a long period of COVID19 lockdown. Consequently, it provides some revealing insights into the ongoing impact of the COVID19 pandemic on the film and TV sector operating across Wales.

A considerable academic and public policy literature now exists that argues for the importance of large urban clusters and the role place plays in shaping and growing the UK's creative economy. Substantial public investment has been made in recent years by both UK and Welsh Governments in strategic initiatives such as UKRI's Creative Industries Cluster Programme to help drive economic growth through innovation. Inevitably this concentration of resource and focus has given rise to questions about the significance of other regional areas or 'microclusters' that help shape the UK's creative economy. Increasingly we are starting to read arguments that challenge the exclusive focus on large urban economies. Screen Survey Wales 2021 speaks to that emerging agenda. It delivers findings that demonstrate the impact of specific regional infrastructure and work patterns in Wales' regional economies, and that evidence specific realities of working in the film and TV production sector outside the capital.

This report provides evidence and insight to help drive strategic action in support of the film and TV production sector across the whole of Wales. A skilled workforce is vital to the sector's future. The COVID19 pandemic has provided a profound challenge to the geography of creative labour revealing how much remote working is possible and how technology can provide routes to connect people across geographic boundaries that had seemed insurmountable. But it also provides evidence of how exclusionary practices, lack of strategic connectivity and infrastructure deficits continue to limit opportunities for learners, workers, and firms in the film and TV production sector.

The University of South Wales' civic mission is to work in partnership with others who see pressing skills gaps, needs and missed opportunities for building a more inclusive, ambitious and sustainable film and TV sector in Wales. It is time now to invest in skills, to invest in people, to invest in all the places where talent can be found and where it can excel.

[2] https://clwstwr.org.uk/

Executive Summary

The aim of Screen Survey Wales 2021 is to map the film and TV sector beyond the CCR and in doing so, to improve our understanding of these important regional economies'. Working in partnership with Creative Wales, the focus of this research is to explore the skills challenges and training needs of the industry across Wales. Though not the primary focus of this report, our research casts a light on the changes seen within the screen sector following the first 18 months of the COVID19 pandemic. The term 'pan-Wales' is used in this report to refer to all areas of Wales excluding the CCR.

S4C: Stock image

Findings

Finding 1: Creative Clusters in Wales

There are two creative clusters outside the CCR, one located in the north west of Wales and the other in south west Wales. Though significantly smaller in size in comparison to the Cardiff cluster, the creative industries represent a key growth sector in the regions, with predicted growth of 6% in north Wales[3] and 11.3% in south west Wales compared with growth on a national level of 3%[4].

Finding 2: Industry/ Education Collaboration

Our research found that only 40.7% of companies surveyed collaborated or worked with apprenticeships, Higher Education or Further Education providers, and the percentage of companies collaborating with other training providers was even lower, with only 37% reporting doing so.

Finding 3: Skills Gaps

There are numerous skills gaps currently impacting the screen industry pan-Wales in 2020-21. Specific named roles identified by more than one respondent included Editors, Edit Assistants, Researchers and Producers. Shortages in HGV drivers was also listed as one of the main problems facing service providers for the screen industry. The current crisis in HGV drivers points however to how dynamic the needs are in a changing industrial sector. Therefore, an annual survey of skills shortages is needed to provide up-to-date evidence of skills needs.

Finding 4: Mobile Workforce

The film and TV labour force pan-Wales shows high levels of mobility. Our research revealed that 80.7% of freelancers travelled or relocated for work over the past 12 months, with 46.1% travelling outside of Wales for work and 38.4% travelling to Cardiff. Of those surveyed, only freelancers based in north Wales found work in their locality.

Finding 5: A Sector of SMEs

The film and TV production sector pan-Wales overwhelmingly comprises SMEs. 59.3% of the companies we surveyed employed fewer than 4 members of staff.

[3] https://northwaleseab.co.uk/sites/nweab/files/documents/Skills%20Employment%20Plan%20A4.pdf
[4] http://online.flipbuilder.com/itet/kycm/mobile/index.html

Finding 6: Talent Highways

Film and TV production is a peripatetic industry and production is heavily reliant upon an efficient transport network; consequently, it requires access routes and infrastructure. In Wales, creative clusters are located along the main routes in and out of Wales. The importance of access to the "M4 corridor" for companies in South Wales is well documented. However, this report highlights the economic importance of the A55 and connectivity between the north Wales screen cluster and the screen production hub in North West England centred around Salford Quays. Several companies in this cluster noted that work was lost to companies outside of Wales due to their proximity to the main arteries of the M4 and A55.

Finding 7: Factual Content for Public Service Broadcasters

Public Service Broadcasters (PSBs) are vital to the TV production sectors in north and west Wales. Over 90% of content created by the larger production companies outside the CCR (employing between 25 and 55 employees) was for PSBs, namely S4C, BBC and Channel 4. While the Cardiff cluster is associated with the huge growth of drama production, outside this region it is factual and factual entertainment that are the dominant production genres.

Finding 8: Recruitment by Word of Mouth

Informal methods were listed as the main source of recruitment by companies and freelancers. 77.7% of companies listed word of mouth as a means of recruitment with 76.9% of freelancers listing personal contacts and networks as one of their main sources of finding work. Moreover, 29.6% of companies listed word of mouth as their sole method of recruitment. Over-reliance on networks and archaic hiring practices can make it difficult for new talent, especially from Black, Asian and Minority Ethnic communities and low socio-economic backgrounds to breakthrough into the industry. Despite recent industry initiatives, this reliance on word of mouth and existing networks for recruitment remains an impediment to increasing diversity across the sector.

Finding 9: Remote Working

55.6% of companies surveyed listed remote working as the most significant change to working patterns in the screen sector over the past 18 months. Remote working has not only affected the way in which people undertake their work, it has also impacted the way in which people receive both formal and informal on the job training. From a skills perspective, there is now a growing concern about how mentoring and shadowing can be meaningfully undertaken when people are not physically in the same space. Film and TV production (including post-production) is a team game where co-location has been the foundation of how people learn from each other.

Finding 10: Creative Wales from a Regional Perspective

Our research revealed perceptions that Creative Wales both prioritises the southeast and is not present in other parts of Wales. We found that the absence of a fully functional and informative communications channel is hindering Creative Wales' profile. Only 57.6% of freelancers surveyed had heard of Creative Wales. Of those, 33.3% were unsure of how Creative Wales could support them. Similarly, only 33.3% of service providers had heard of Creative Wales. In contrast 88.9% of production companies surveyed were aware of Creative Wales.

Finding 11: Transparent Investment in Training

Our research found that greater transparency needs to be communicated to stakeholders when it comes to funding and training opportunities. Clear objectives should be a requirement of all training provision supported by Creative Wales. A common theme to emerge from the research was a desire to see investment in sustained medium- and long-term skills programmes as opposed to relying solely on short-term initiatives. Medium and long-term investment was seen as vital in supporting the private and publicly funded training sector. It was also seen as an opportunity to bring about change in areas that do not lend themselves to quick wins. These include areas such as diversity and inclusion and business capture skills.

Finding 12: Flexibility in Funding

Survey respondents were highly appreciative of the Production Fund and Development Fund, together with the considerable work undertaken by Creative Wales during the COVID 19 pandemic to support the screen sector in Wales. However, some felt that more flexibility was needed to support certain forms of content such as short-form content or hybrid art projects that do not easily fit either Creative Wales' Production and Development Funds or Arts Council Wales funding.

Recommendations

1. A sustainable film and TV sector in Wales requires investment in skills and training that extends beyond short-term responses to immediate crises. An action plan for skills must balance responses to short-term crises in the labour market with long-term planning and investment that can allow training providers and other stakeholders to deliver the transformational change required to build an inclusive workforce.

2. Creative Wales needs urgently to develop and publish its action plan for skills. This plan should include a clear vision of what Creative Wales wants to achieve in partnership with the sector across all of Wales in terms of the future workforce. This plan will gain trust and buy-in if it identifies clear and transparent criteria for its public investment in skills and workforce training and acknowledges the different priorities and needs across Wales.

3. A skills action plan that serves all of Wales must begin by recognising the different output and skills needs of the microclusters in Wales. It cannot focus exclusively on the CCR if it wishes to drive growth and inclusion in this sector across the whole nation. Creative Wales' action plan should target opportunities for growth in factual TV and in the capacity of production companies outside the CCR to win returning series commissions.

4. Creative Wales must ensure the specific skills needs and business opportunities of Wales' regional microclusters informs all its activity and is represented in the composition of its advisory groups and Board. The needs of these regional microclusters must feed directly into Creative Wales' skills action plan for the screen sector. Making engagement and representation throughout Wales a priority can only enrich Creative Wales' own standing among industry and training providers and therefore its capacity to deliver for all of Wales. In Wales, as elsewhere in the UK, "talent is everywhere but opportunity Is not[5]. Prioritising support for these regional clusters when it comes to talent retention and future skills development can only improve creative diversity and opportunity across the sector as a whole.

[5] https://www.artsmark.org.uk/news/de-montfort-university-and-arts-council-england-launch-talent25


Rondo Media

5

Long term training provision needs to be open to both online and in-person delivery dependent on user needs. Budgets should reflect the value of both kinds of provision. We should retain the improved accessibility offered by online training where it allows for a more inclusive and accessible offer. Remote mentoring needs to be part of any future training strategy.

6

Remote working needs to be considered holistically in planning future training provision and not seen as a silver bullet for engagement. Remote working, in itself, does not overcome barriers to inclusion.

7

Action is needed to support structural, medium-term partnerships between HE, FE and other training providers and production companies. Intervention is needed to help broker these partnerships. This is especially acute for micro and small production companies and educational and training providers not located in larger screen clusters.

8

Action is needed to address the skills shortage in Welsh-language multi-skilled work in production roles such as Edit Producers and Shooting Producers Directors.

9

Tailored business skills development for Wales' film and TV SMEs is urgently needed across Wales. This should be a core element of Creative Wales' action plan on skills and its partnership with the industry. A business leadership skills offer must speak the sector's language; it must work with a deep understanding of the sector's business models and challenges. A flexible offer is required given the sector's project-based working patterns and its reliance on a freelance workforce. Improved market intelligence, improved understanding of funding models in a converged media market, and improved business leadership skills are needed by the production sector if they are to capture business in a global converged market.

10

Film and TV ambassadors should be identified and supported with resources to help drive change and innovation in Wales' SMEs. Ambassadors should focus on key areas of business opportunity such as innovation in content and IP creation across film, TV and games, and success in winning business beyond existing PSB commissions. Ambassadors could provide powerful peer to peer advocacy to SMEs that showcase how good practice on diversity and inclusion in recruitment, retention and wellbeing can be achieved and can bring about change that makes the industry a better place for everyone to work in.

11

Action is needed to improve the wellbeing of workers in film and TV. This includes freelancers who comprise a high percentage of this sector's workforce. Wellbeing must become integral to the industry's employment practices and workplace culture if public funding is to be invested in the sector. Tangible action to help bring about such transformational change is best delivered with partners including trade unions such as Bectu, Equity, the Musicians' Union, the National Union of Journalists and The Writer's Guild of Great Britain, industry representatives such as TAC and PACT and public funders such as Creative Wales, Ffilm Cymru and Public Service Broadcasters. Good practice, including, for example, work undertaken by CULT Cymru/ Bectu, and the rich resources produced on wellbeing by the Film and TV Charity[6] should be widely shared with the sector. Support should be given to SMEs to help them integrate these resources into their own policies and employment culture. Public funders can use such resources to actively support behaviour change and also to assess whether SMEs are actively playing their part in making tangible steps to improve wellbeing.

12

Mobility is one of the main barriers for individual workers to gain employment in film and TV in rural and semi-urban areas in Wales. This is especially acute in areas of higher-level socio-economic deprivation. A travel fund to support training opportunities, including access to filming locations at antisocial hours, would provide a tangible solution to help improve the chances of skilled employment in these areas.

[6] https://filmtvcharity.org.uk/your-support/mental-wellbeing/resources/supporting-your-team/

Introduction and Background

Over the past 12 months the screen sector in Wales has seen substantial growth in film and TV production. This includes both domestic production and investment from outside of Wales. Wales benefits from both remarkable landscapes and a talented workforce due to its established creative industries. However, as the demand for filming in Wales has increased, we are seeing shortages across the board in skilled production staff and service providers. Building on the Screen Work 2020 report that looked at the skills challenges and training needs of the industry in the Cardiff Capital Region, this research focuses on the rest of Wales, and aims to understand the state of the screen industry across Wales.

Once production resumed following the easing of COVID19 restrictions, Wales' screen sector has seen a boom in both international and domestic filming. From Severn Screen's Havoc (Netflix), Bad Wolf's His Dark Materials (BBC), Sky's Save The Cinema (Sky Cinema supported by funding from Ffilm Cymru) to Triongl/ Cwmni Da's Stad (S4C), Wales' film and TV industry is seeing its busiest period in recent years[7].

While the growth of the screen industry in Wales should indeed be celebrated, the sector looks very different post-lockdown. There has been a significant increase in the number of people working remotely, particularly those in managerial, administrative, and post-production roles, and COVID-safe working conditions on set have also brought new challenges. One area where these changes have had a significant impact is with the delivery of training and the opportunities available for on-the-job training. The increased demand on the industry has highlighted the real and current deficit in Wales' skilled screen workforce across the board, particularly in areas outside the Cardiff Capital Region. Previous research and press attention have often focused on international and network productions associated with non-domestic or CCR production houses and studios. To sustain this growing industry, a better understanding is needed of the screen sector across the whole of the nation and how investment can be directed to ensure that Wales can maintain this important industry.

[7] https://www.bbc.co.uk/news/uk-wales-58409551


The Light/ Y Golau: Filming on location in Llandovery

Methodology

Screen Survey Wales 2021 identifies the composition and characteristics of the film and TV sector beyond the Cardiff Capital Region and explores the available relevant vocational provision, skills challenges, and training needs within the industry. Industry and post-16 training providers were included in this dual-phased study with the aim of providing a comprehensive overview of the challenges facing the sector in north, mid and west Wales.

Methods

Data collection began in April 2021 and ran until late September 2021. A mixed methods approach was adopted using surveys, interviews, and desk research.

Our research aims were to:

1. Map the film and TV production companies operating within the screen sector pan-Wales.

2. Identify the main challenges facing companies and freelancers working in the sector pan-Wales.

3. Assess the training, vocational and educational provision post-16 that exists for the screen sector pan-Wales.

4. Identify skills shortages and training needs that are hindering the sector's capacity to be sustainable and grow pan-Wales.

5. Understand the impact COVID19 has had on the industry from a training and skills perspective.

6. Identify barriers in the public and industry understanding of Creative Wales's mission, available support, and investment strategy for the sector across Wales.

Defining the Film and TV Sector

In order to be included companies or organisations needed to be:

1. active companies producing film and TV content for public broadcast,

2. providing services (e.g. drones, camera equipment, stunts) for film and TV productions,

3. working from an operational base in Wales but outside the 10 local authority areas comprising the Cardiff Capital Region. We excluded companies whose main output is promotional, 'client led' screen production for the purpose of PR, communications, marketing, brand promotion of a product or service, influencer type online content development and games companies.

Desk Research

Mapping of film and TV production companies was undertaken by using Companies House and FAME databases. There are substantial limitations with using SIC codes to accurately identify film and TV companies because the codes themselves are notoriously vague and are often not well understood by companies when they classify themselves. Data cleansing was therefore needed to sense check initial searches.

We used the FAME Database through Bureau Van Dijk. FAME offers comprehensive information on public and private companies in the UK and Ireland. It enables researchers to search individual companies and identify how their economic activity is classified and the type of economic activity they conduct.

Company data from FAME was utilised accessing the Standard Industrial Classification of Economic Activities (SIC) focusing on primary and secondary SIC codes, covering a range of areas where organisations self-classify as a business that produces professional screen content as a core activity. All data gathered from FAME was downloaded in May 2021. We initially identified SIC codes that directly relate to what is classified broadly as 'Audio Visual Sectors'. This was followed by a cleanse of the dataset of all the companies that did not meet the inclusion criteria.

Companies were then checked against recent financial reports filed to Companies House and whether the company had an up-to-date website or social media presence. We 'sense checked' with industry organisations and affiliates with current sectoral knowledge regarding 'live' organisations operating in Wales outside of CCR. We also cross-checked with submissions to the industry census survey.

We excluded companies whose main output is promotional content, for example promotional videos for commercial firms outside the creative industries sector. There were two test cases: StoryJar, which produced two short drama films, and Focus Shift Films, which produced one short drama film. These were excluded from the list due to their main activity. Further research may be undertaken to examine the impact of these agencies and influencer-type online content development in Wales.

It became quickly clear that Tinopolis is a special case in the creative industry landscape in the whole of Wales. It has multiple companies registered as subsidiaries, companies that act as the legal-financial arm, as well as the 'parent' company (DMWSL 660 and DMWSL 678). These were excluded because they do not produce content, as far as it was possible to ascertain. We also excluded companies that are part of Tinopolis, registered in Wales, but operate outside of Wales. This is because we did not want to skew the data to imply a greater concentration of companies than exists in practice.

Finally, we excluded companies that are special purpose vehicles (SPVs), and freelancers who have a registered company. This is because the present research is aimed at determining the skills shortage in the sector that companies face and how they provide training. Freelancers are much more likely to be the ones utilising training rather than offering training services.

At the time of conducting this desk research, 34 active 'companies' that produce and distribute film and TV content pan-Wales (including 2 subsidiaries of Tinopolis) were identified (see Map 1). 18 of these companies were set up in the last 10 years (see Figure 1). A further 26 service providers (companies that provide camera equipment, drones, stunts, and similar) were identified through the SIC code sift (see Map 2). Additional companies not captured during our desk research also completed our survey with the majority of those being service providers who may not have used the primary and secondary Audio Visual SIC codes. This highlighted the difficulties of mapping these companies based on the data taken from the FAME database.

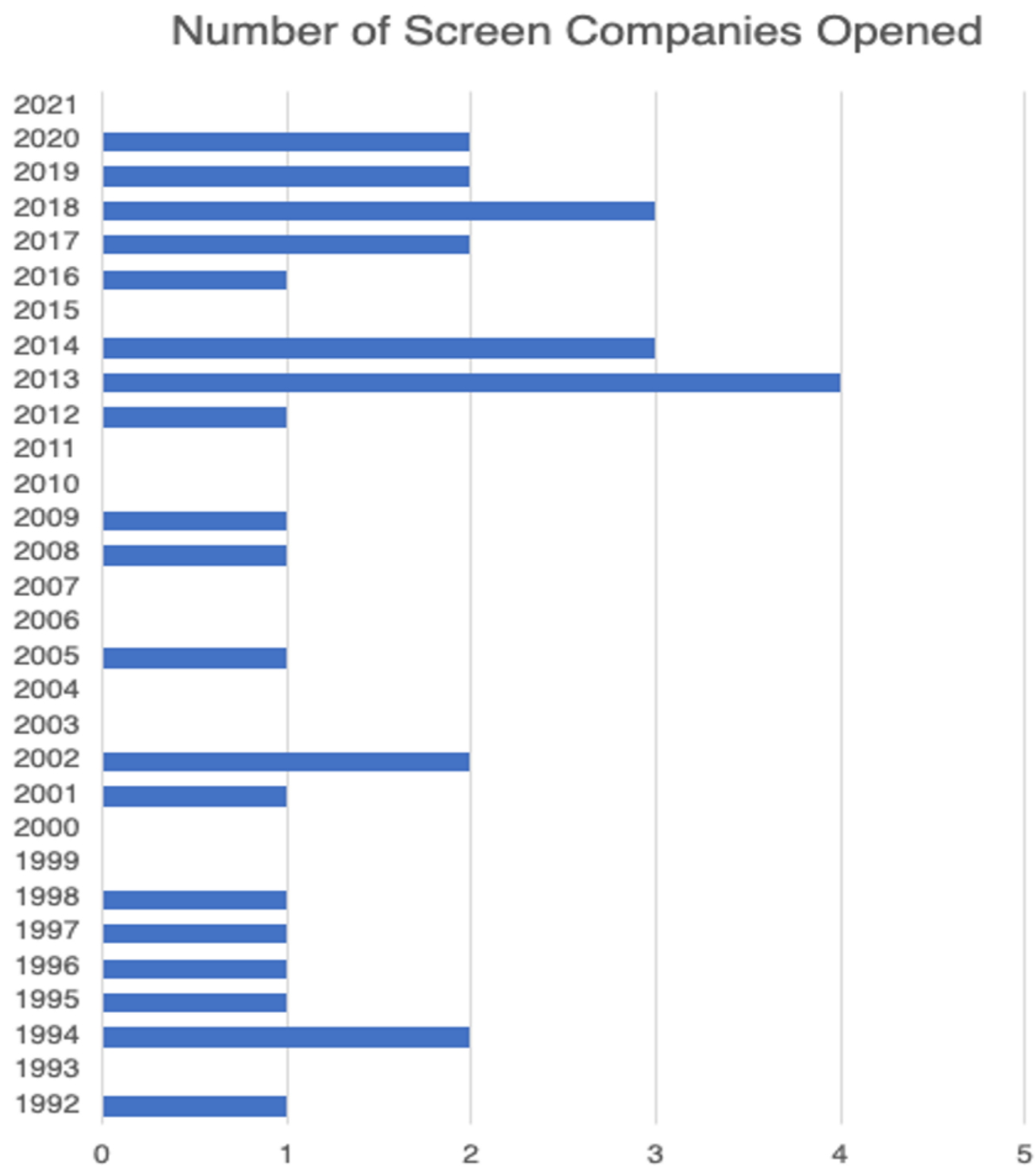
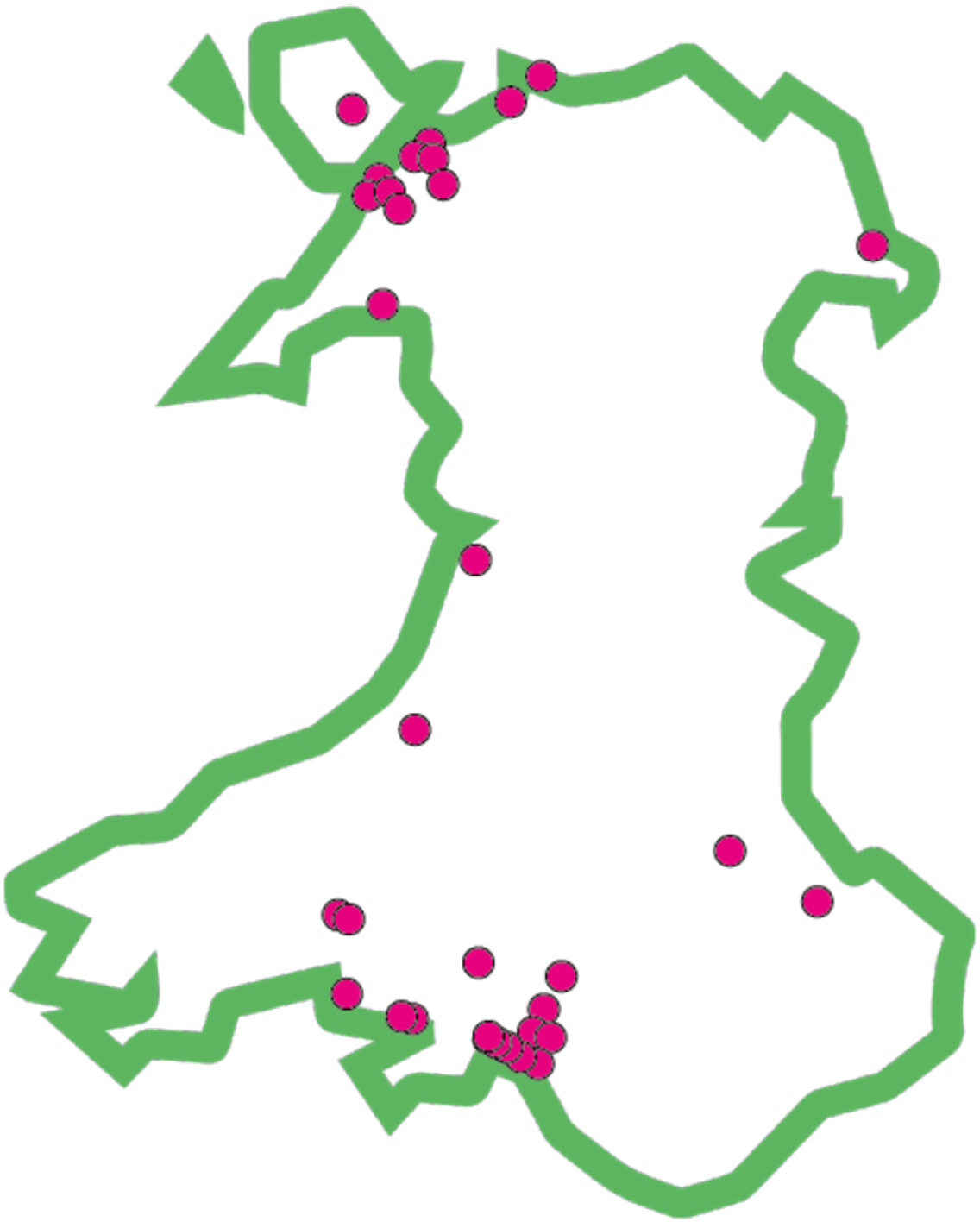
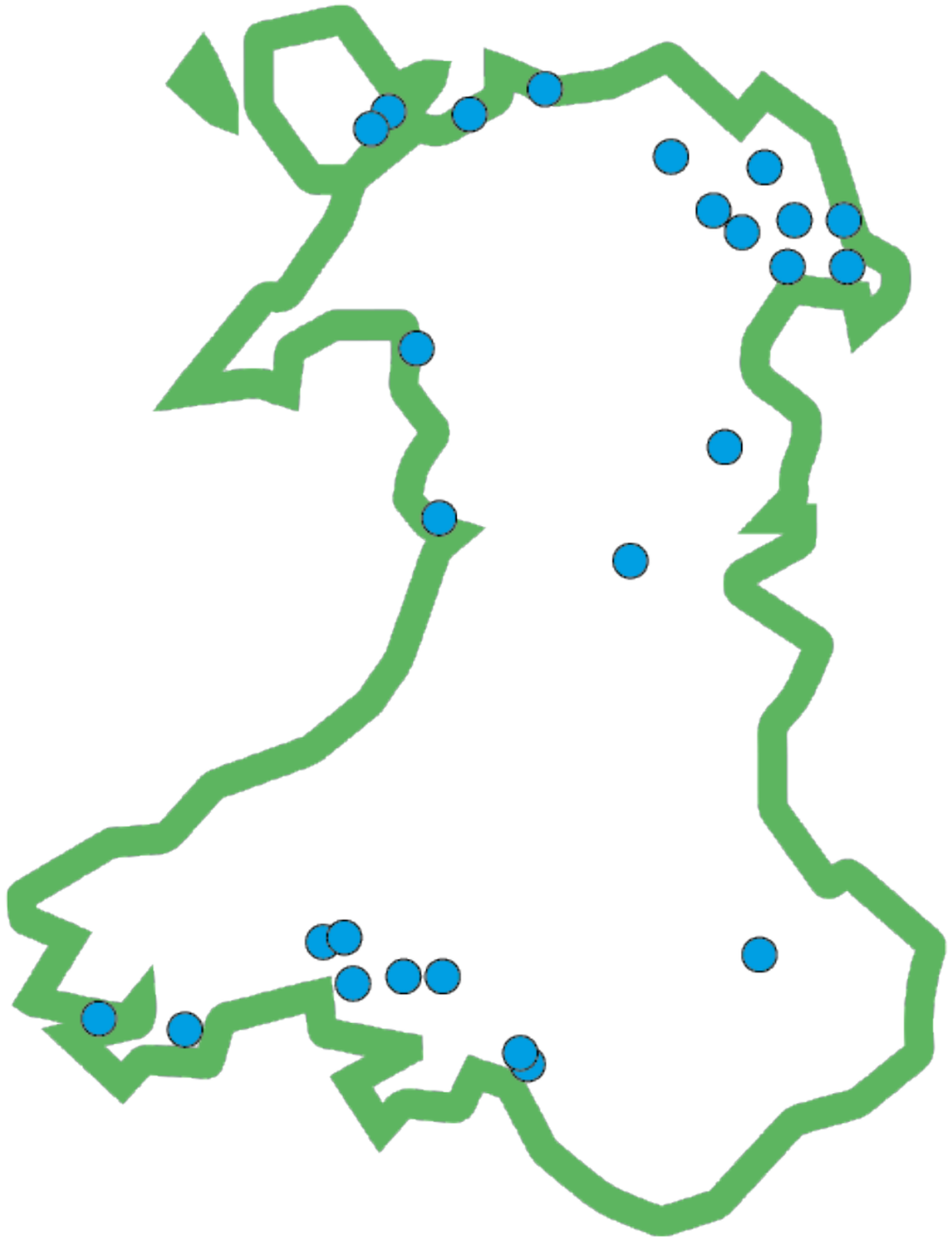


Figure 1: Number of screen companies opened



Map 1: Pan Wales production companies and distributors



Map 2: Service Providers outside the CCR

FE and HE Training Providers

Post-16 training providers were identified through data taken from UCAS, ONS and online sources. A database collating all FE and HE screen media focused courses or courses with film and TV elective modules was created based on this research including the campus locations.

Surveys

Two surveys were formulated; one of post-16 training providers and a second survey of industry. The industry survey of freelancers and screen sector companies used branching questions allowing for company and freelancer responses to be identified. All data collection was subject to approval by a Research Ethics and Consent Panel at the University of South Wales. The surveys were available for completion electronically and hosted by onlinesurveys.ac.uk. Completed questionnaires were held securely on the electronic platform and password protected. Drafts of both surveys were shared by the USW research team with Creative Wales for input and feedback.

The surveys were available in both Welsh and English. A social media campaign over multiple platforms was launched to maximise the reach of the survey, with all communications published bilingually. The training survey was launched on the 28th May and remained live for two weeks, followed by the industry survey launched on the 11th June running until the 9th July 2021. The question sets were similar but not identical to those used for the Screen Work 2020 report to allow for comparisons to be drawn between both reports. A total of 89 survey responses were completed: 17 training surveys and 72 industry surveys.

Interviews

Twelve semi-structured interviews were conducted as part of this study. Depending on the participant's preference, interviews were either conducted in person or using video conferencing. Interviews were conducted in either English or Welsh depending on the participant's preference. Two further interviews were conducted via email. Interviewees included three Further Education providers, one Higher Education provider, Regional Skills Partnership North Wales, BBC Studios, S4C, TAC, Bectu, a production company in south west Wales, Ffilm Cymru and other training providers and organisations.

The Light/ Y Golau: Filming on location in Llandovery

Data Analysis and Thematic Findings

A thematic approach has been taken to presenting our research findings. As this research was centred around mapping the screen sector beyond CCR, our first theme concentrates on the characteristics of the sector pan-Wales. Our findings can be read in conjunction with Chapter 2 from the Screen Work 2020 report in order to draw direct comparisons between the screen sector within the CCR. Three further themes were identified namely Skills Gaps and Recruitment, Pan Wales Microclusters and Remote Working.

Thematic Finding 1: Characteristics of the Screen Sector Pan-Wales

The majority of film and TV freelancers and organisations based outside of the CCR work in Television, Film and High-End Television. Other sectors are listed in Figure 2.

49% of respondents surveyed were freelancers. 49% were Private Limited Companies, 1% were Limited Liability Partnerships and 1% Charities.

Map 3 shows the location and size of the companies and location of freelancers that completed our survey.

Desk research using SIC codes reveals that there are 34 film and TV companies operating outside the CCR. 44.1% of these companies completed our survey in addition to 1 other company set up since the FAME database sift cut-off date. Identifying companies that support the screen industry was particularly difficult. Our data found a further 26 service providers working within the screen sector. Only 21.4% of these companies identified during our SIC code sift completed our survey. We believe that a major reason for lack of engagement by these companies is that many in the film and TV supply chain do not primarily identify as being part of the screen sector. Understanding the needs of these companies when it comes to skills and training is vital as these companies are fundamental to the supply chain.

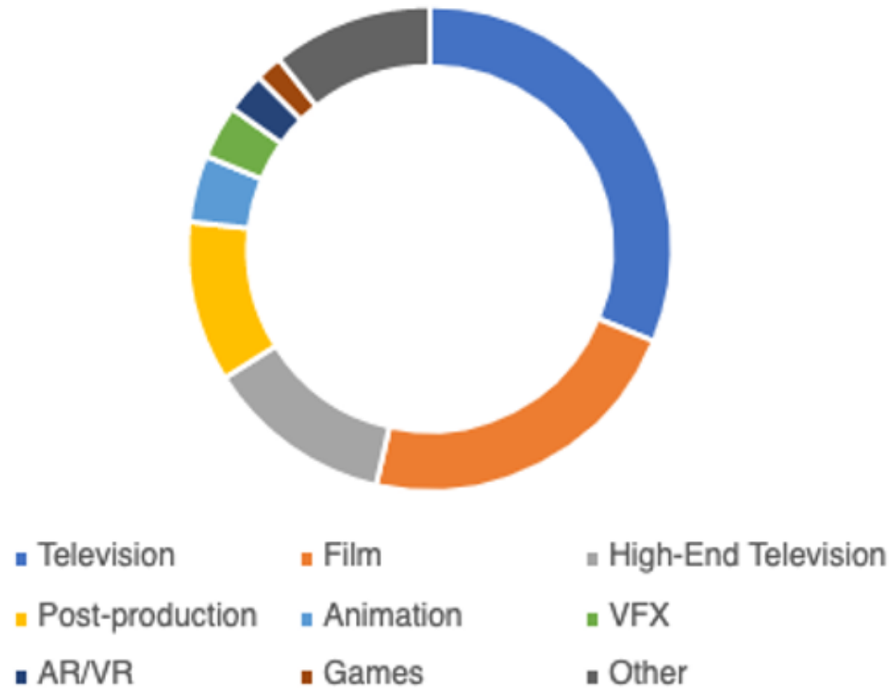
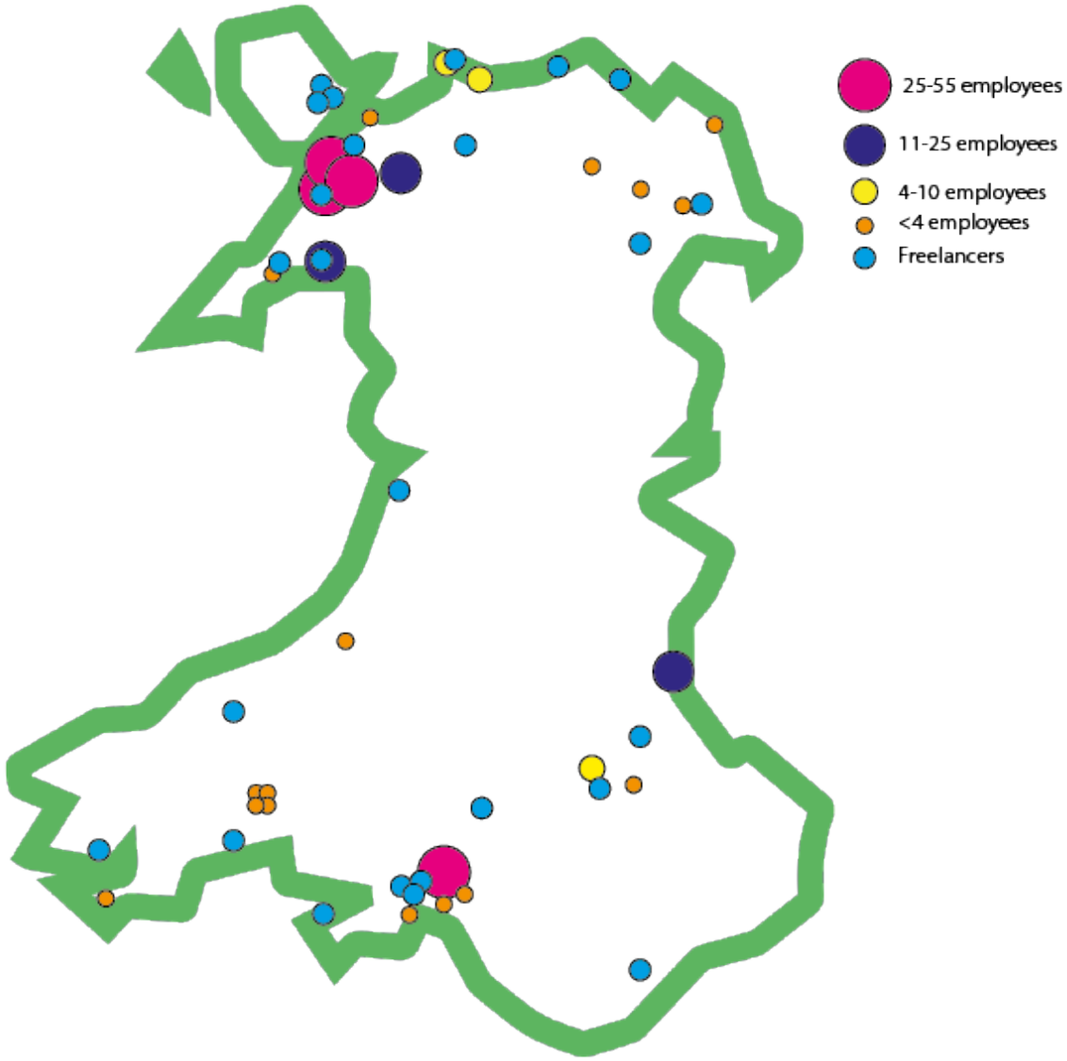


Figure 2: Areas of work

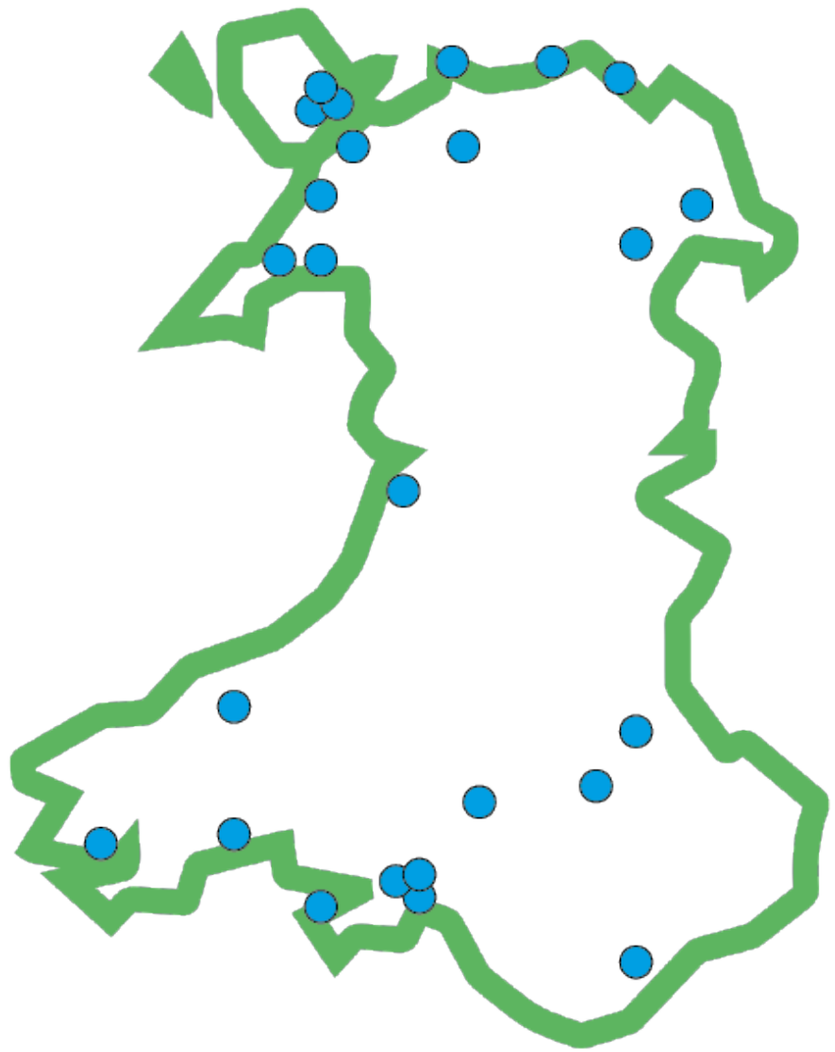
Figure 3: Organisational/ individual status



Map 3: Company size and location and freelance respondents

According to figures taken from the Wales Screen/ Creative Wales database, there are 217 registered freelancers pan Wales (outside the CCR). 57.6% of freelancers that completed our survey were registered on the database. Freelancers registering on the Wales Screen database previously needed at least one professional credit. However, in early 2020 a new 'Entry Level/ Transferable Skills' category was added to allow those in other industries such as theatre and events to register their details. While the Screen Wales database is a well-established and adaptable resource there is still some work needed to fully map and capture the whole freelance community in Wales.

Of those freelancers surveyed there is an even split between those located in north Wales and south west and mid Wales (see map 4).



Map 4: Locations of freelancers

- 70.4% of organisations working in the screen sector pan-Wales are classified as SME's (fewer than 10 staff) or micro independents (fewer than 4 staff). None of the companies surveyed outside CCR employed more than 55 employees.

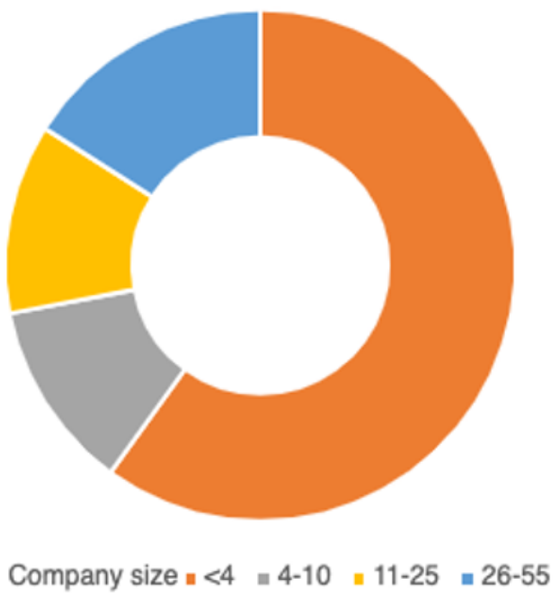


Figure 4: Company size

- 34.6% of freelancers surveyed were Welsh speakers. 44.4% of companies surveyed produce Welsh language content.
- 34.6% of freelancers surveyed were parents. Of those surveyed 78.8% of women and 41.2% of men were parents.
- 38.4% of freelancers surveyed were female and 62.6% were male.
- 5% of respondents considered themselves to be disabled or with a long-term health condition.
- 2.5% of respondents came from ethnic groups or backgrounds other than white British/ Irish and 2.5% came from white non-British backgrounds.

Thematic Finding 2: Skills Gaps and Recruitment

Skills Shortages

During the data collection period from April-September 2021, the film and TV production sector in Wales experienced one of its busiest times in recent years. Rapid demands for skilled labour were the result of numerous productions re-opening at the same time. On the one hand this suggests a burgeoning market in content creation that is to be welcomed especially in the wake of economic hardship during lockdown. On the other hand, this concentrated demand for skilled labour exposed major skills shortages across the board.

While the industry across Wales has seen significant growth, a large proportion of this has been in the CCR. Our research identifies specific skills gaps impacting the screen industry pan-Wales during 2021. Specific roles included Editors, Edit Assistants, Researchers and Producers. In the immediate term, shortages in HGV drivers are also listed as one of the main problems facing service providers for the screen industry.

Our research found that technical multiskilling was another area of serious shortage. One Production Manager explained how there is a growing need for Welsh speaking multiskilled roles, namely Shooting Producer Directors, Edit Producers and Shooting Assistant Producers with network credits. Executive Chair of one of Wales's largest media organisations explained how:

> **"due to the natural changes seen within in the industry and costs that drive production we are seeing a greater need for multiskilling than 2/ 3 years ago. Re-training someone who is good in one area to be multiskilled is not easy – people almost get stuck. I see this as a real challenge for us"**

In addition to shortages in technical multiskilled roles there is also a growing need for upskilling when it comes to business understanding. Our research found that there is a demand for business skills to understand where value lies in a converged media market. Business and production multiskilling is central to the future of the industry especially when considering the changing landscape associated with funding. One production company Chief Executive explained how:

> **"being multiskilled in the various roles is very important but not enough attention is being given to an understanding with new entrants of how content is funded and how you can make money from content. Those are going to be key skills in moving forward."**

Training

When a large proportion of the industry ground to a halt as a result of the pandemic, online training offered a means of upskilling and supporting the needs of the industry's workforce. Opportunities also presented themselves for FE and HE institutions through utilising the possibilities presented through video conferencing platforms and tapping into a skills workforce unable to work due to the pandemic. One FE course tutor noted:

> **"because of lockdown and online, we have lots of online talks, so we can invite people to come and talk, you know, before we were kind of thinking, how are we going to get them up here, where are we going to put them up, how we got that money, but now it's a matter of, oh have you got 20 minutes just to come online and talk to our students"**

When productions resumed in Spring 2021 our research found a growing concern amongst training providers about how best to continue offering training that meets the needs of the sector when increasing numbers of people are returning to work. One organisation that represents the independent television sector explained how there is "zoom fatigue" amongst people working in the industry. This was reiterated by another trade union representative who explained how despite the demand for training being greater than ever:

> **"the industry is extremely busy right now, people have little time or energy to undertake courses."**

Our research also found that more support was needed to encourage collaboration between training providers, particularly FE colleges and production companies and studios working and filming in Wales. One FE college course leader voiced his frustrations in relation to the missed training opportunities associated with location-based filming in Wales.

> **"Production companies are literally travelling down the A55 past me to go to Snowdonia to film their latest sword and sandals drama in the rugged hills of Snowdonia and it would be really nice if somebody—Creative Wales? - could sort of say... make sure you stop off on your way and pick up four or five interns to go onto that shoot with you."**

Wellbeing

Our research found that there is a growing need to address wellbeing and mental health issues within the industry. The Looking Glass Report[8] (Film and TV Charity, 2020) highlights the severity and scale of mental health and wellbeing issues in the screen industries. The report found that two thirds of those working in the screen industries had experienced depression compared with two in five people nationally. It also revealed that 66% of freelancers had contemplated leaving the industry due to concerns associated with mental health and wellbeing. The pandemic has highlighted the longstanding issues deep rooted in the culture of the screen industry. One training provider explained how:

> **“there is a large gap in understanding of the duty of care to freelancers and how to mitigate that in terms of mental health/ health and safety/ wellbeing and bullying and harassment.”**

In addition to highlighting these issues the pandemic has exacerbated the problem, particularly for those who continued to work throughout the pandemic. One company Chief Executive explained how:

> **“we mustn’t underestimate the kind of exhaustion and mental health issues that’s come about with this pandemic especially with a lot of people in our industry that have worked throughout it...working under such restrictive conditions.”**

Case study: Wellbeing Facilitator Cymru Pilot

Bectu/ CULT Cymru in partnership with 6ft from the spotlight have launched a pilot scheme to train freelancer wellbeing facilitators to work across Wales. A Wellbeing Facilitator is a highly trained third party presence on set ‘whose role is to stem and reverse the tide of mental ill health’. While Wellbeing Facilitators have been employed on some large-scale productions elsewhere in the UK, the advisory group made up of broadcasters, production companies and TAC, Ffilm Cymru, Clwstwr and Creative Wales are eager to offer this service on all types of productions across Wales and made available to companies regardless of their size. The pilot, which is funded through the Welsh Government’s Wales Union Learning Fund and the Welsh Broadcasting Trust will be rolled out in early 2022. The scheme will offer both full time facilitators available to work on larger productions and other facilitators employed on a short-term basis or available as a service that can be tapped into when required.

[8] https://filmtvcharity.org.uk/wp-content/uploads/2020/02/The-Looking-Glass-Final-Report-Final.pdf

Recruitment Practices

The sector pan-Wales is heavily dependent on informal methods of recruitment. 77.7% of companies and 76.9% of freelancers reported 'networks', 'contacts' and 'word-of-mouth' as their main means of finding employment and crew. 29.6% of companies listed word-of-mouth as their sole method of recruitment. 51.6% of companies and 26.9% of freelancers listed 'online sources' or 'social media' as a means of recruitment. Over reliance on contacts, networks and other anachronistic hiring practices makes it extremely difficult for new talent to break into the industry.

A profound culture shift is needed to make entry into film and TV genuinely more inclusive and representative of Wales. The industry itself must be at the vanguard of delivering action for change. Creative Wales, and other public funders, can enable this change if they support both production companies and Heads of Department in good recruitment practice and provide them with the tools to bring about both structural change and confidence in being able to recruit fairly.

Inequalities and Diversity

Notable inequalities remain when it comes to gender balance within the screen industry across Wales, with only 38.4% of freelancers/ sole traders identified as female in our survey. Our research revealed that there is a need to address concerns relating to workplace inequalities, harassment, wellbeing and mental health. This was particularly prevalent amongst women freelancers. 22.2% of women surveyed listed inequalities, bullying and harassment as key barriers to progressing in the industry. Our research also revealed that 77.8% of women surveyed were parents compared with only 41.2% of men. According to a recent study by the Institute of Screen Industries Research at the University of Nottingham 'retaining mothers in TV isn't a priority for the industry. It doesn't feature on diversity agendas and the exodus of women over 35 isn't talked about as something that there's any urgency to address'[9]. One woman in our survey pointed to this explicitly noting that being a parent is one of the main barriers to career progression.

> **"Over my career the main barriers have been: Being a parent, a woman and a carer."**

Maintaining a work-life balance was seen as a particular challenge for those with children.

> **"Excessive hours of work (16 to 18 hours per day real time, of which only 11 hours are paid, is the norm) makes it difficult to sustain a balance with family life."**

[9] https://www.nottingham.ac.uk/research/groups/isir/documents/locked-down-locked-up-full-report-august-2021.pdf

15.3% of freelancers (both male and female) listed longer working hours on set as a direct result of changes to working patterns to comply with COVID19 safety measures. Departments most affected by these changes were those in close contact with others such as costume and hair and make-up - roles traditionally associated with women. Allowing for cleaning and disinfecting between cast sittings has resulted in longer call times. Companies and productions need to be mindful of these additional demands on their workforce and consideration is needed when budgeting to allow for extra support.

Some inroads have been made to address the concerns raised by parents working in the screen sector. Severn Screen became the first studio to hire WonderWorks, a mobile nursery for cast and crew, on Welsh writer and director Gareth Evans' crime drama Havoc filmed in Wales during the summer of 2021[10].

Our research sample contained only a very small number of responses from those who considered themselves disabled or with a long-term health condition (5%) and those from ethnic groups or backgrounds other than white (2.5%). As a result, we are limited in what conclusions can be drawn from our findings. That said, the distinct lack of voice and presence of disabled and ethnic minorities in this study paints a troubling picture of an industry still struggling to be inclusive. One production company Chief Executive noted how:

> **"we need to work a lot harder to show that inclusion is more than just showing disability on screen."**

Our research found that opportunities for people entering the industry later in life were also a concern for freelancers, particularly in relation to training and career progression.

> **"Despite having 20 years' experience in the general field, most starter places are aimed at young people so it's extremely hard to get in."**

47% of training providers surveyed listed communicating transferable skills as either challenging or very challenging. With drastic shortages of skilled workers within the industry, more support is needed to provide up-skilling opportunities for those entering or re-entering the industry and the real possibility of offering job share opportunities. In order to move towards a more inclusive and diverse workforce more is needed from within the industry to facilitate change.

[10] https://variety.com/2021/streaming/global/gareth-evans-netflix-havoc-mobile-nursery-1235017425/

Thematic Finding 3: Pan-Wales Microclusters

Historically the literature on creative clusters has focussed on cities and large urban areas such as the CCR. More recently, as highlighted by the Creative Industries Policy and Evidence Centre (PEC), the focus has shifted and there is now a growing literature on rural and semi-urban microclusters and the 'variation in the units of analysis used in measuring creative industries concentration[11]' . Our research revealed two microclusters where there are higher concentrations of screen companies, found in south west and north west Wales (indicated in Map 1). In a recent study conducted by PEC, 709 microclusters were identified across the UK, 14 of those in Wales. Our research echoes the findings published by PEC which place creative clusters in and around Carmarthen, Swansea, Caernarfon, Colwyn Bay and Aberystwyth. Other microclusters identified by PEC are located in the CCR and subsequently have not been included in our research. The PEC report goes on to explain that, of the 709 microclusters, 247 are located outside of the 47 previously identified larger creative clusters which includes Cardiff.

Other than Swansea the other microclusters identified are in towns. The characteristics of these microclusters differ from those within existing creative clusters and subsequently an agenda is needed that considers the unique characteristics of towns and rural areas. According to PEC's recent review of creative clusters literature, there are many variants that need to be considered when analysing and measuring creative industries concentrations.

[11] https://www.pec.ac.uk/assets/publications/PEC-Creative-Radar-report-November-2020.pdf

One of the factors behind geographical agglomeration - 'the phenomenon that drives clustering' - is access and proximity to other supporting institutions such as educational institutions. Our research found that despite only 40.7% of companies surveyed collaborating with FE/ HE institutions, these companies were in close geographic proximity to either an FE or HE institution/ campus (see maps 5 and 6).

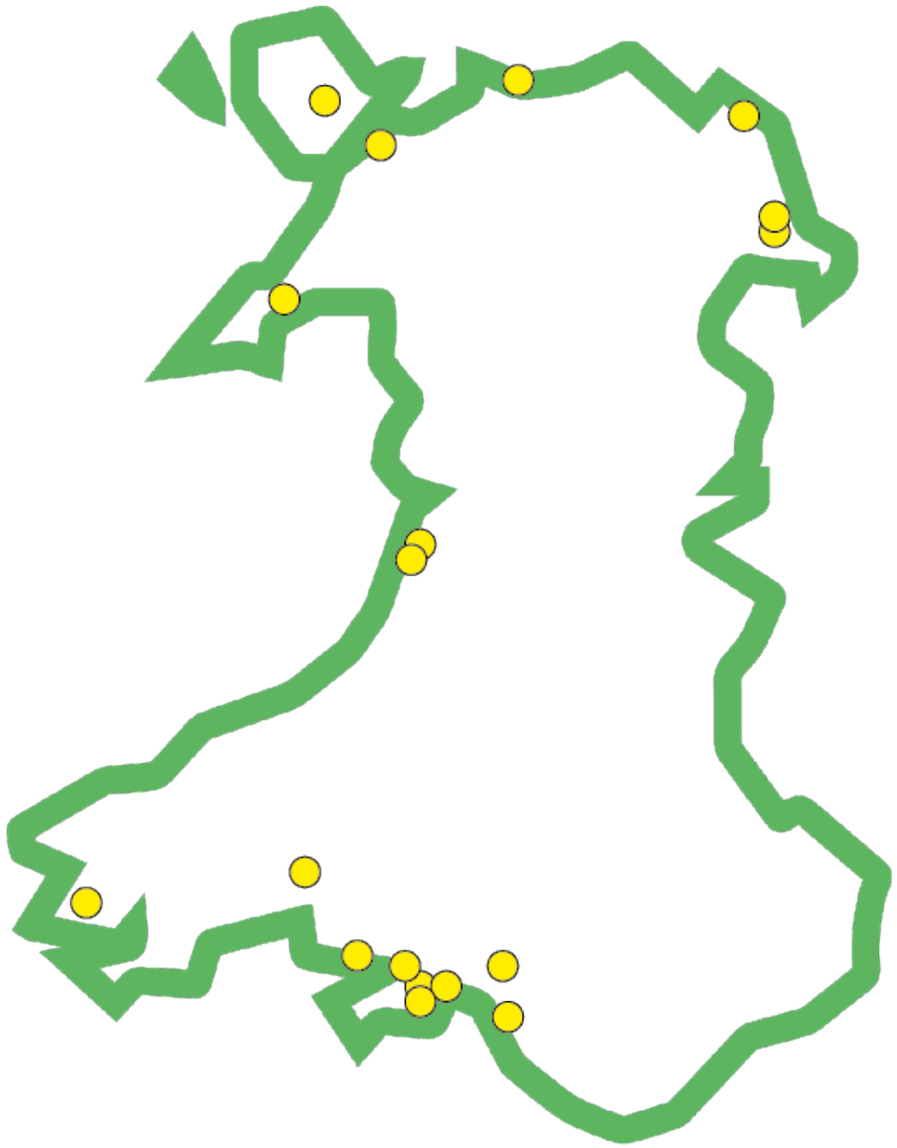
For those companies in close contact with FE and HE institutions, work placements were seen as a positive collaborative experience for all parties involved. Following the success of the CRIW apprenticeship scheme run by Sgil Cymru in south Wales Creative Wales is supporting a pilot scheme in north Wales.

Case study: Criw North Wales

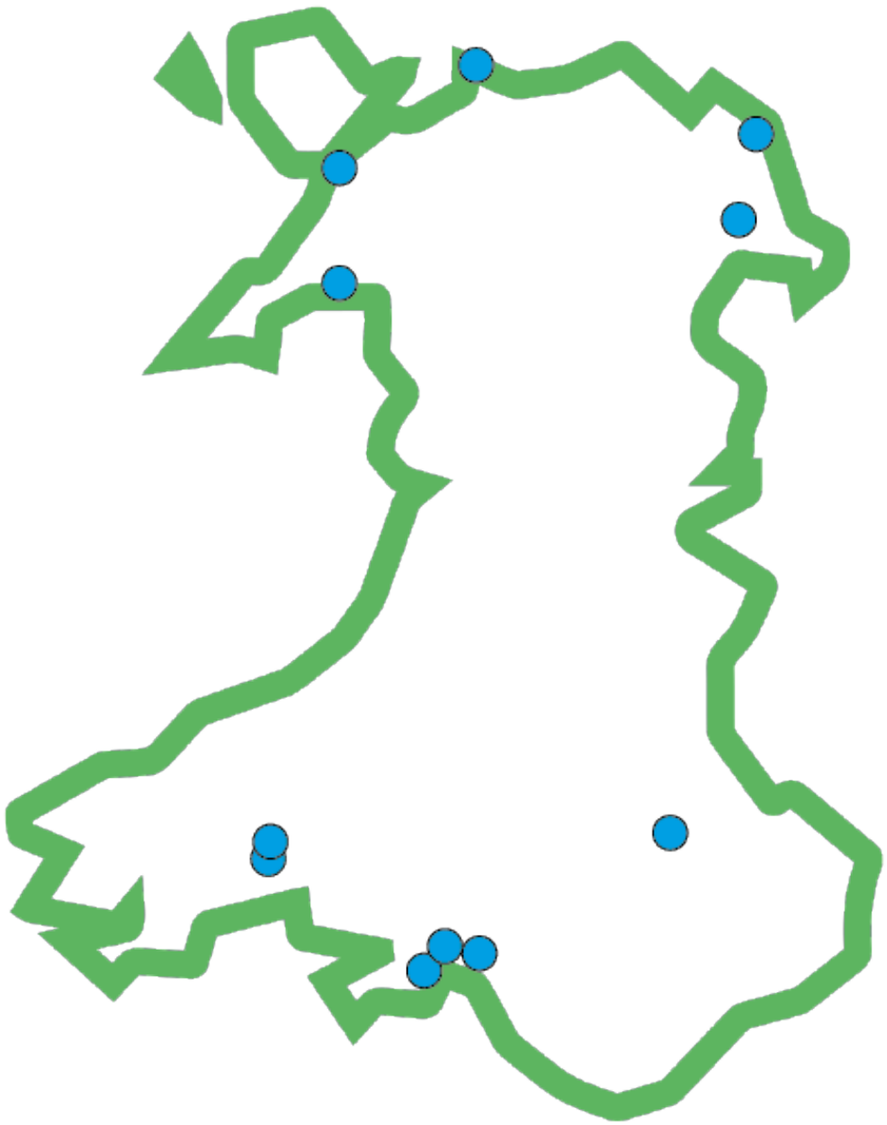
A new production apprenticeship scheme: Criw was launched in north Wales in September 2021 hosted by Grwp Llandrillo Menai with an initial cohort of six apprentices recruited for the 12-month pilot.

Wales based training provider Sgil Cymru are responsible for recruiting, training and assessing the apprentices as well as sourcing paid placements on productions. They have been running the scheme successfully in south Wales since 2019 with a total of 14 apprentices including one working specifically within postproduction.

Creative Wales provided funding support for the south Wales pilot and the initial six months of the pilot in north Wales.



Map 5:Location of FE/ HE campuses running screen sector courses.



Map 6: Companies working with FE/ HE.

Infrastructure: The M4 and A55 Gateways

Infrastructure was a recurring theme particularly when it came to training opportunities. One FE course leader noted how:

> **“We’ve had those vacancies come up, like my students finishing their two year programme and they thought well there’s an apprenticeship scheme for them but a lot of the time it comes down to transport, it really does come down to transport, because if they haven’t passed their test trying to get from say St. David’s to Neyland every day is two busses that take a long time and quite expensive, and it’s completely prohibitive really, the whole rural location and the transport is part of it.”**

Access to transport and particularly the focus on having their own transport raises issues around equality, diversity, and inclusion from a socio-economic standpoint. One HE Faculty Director explained how:

> **“It’s vital that production companies work with training providers and Creative Wales to create and facilitate new ways of supporting ALL talent. Simple initiatives like providing a central fund for location transport and travel expenses would be hugely helpful in creating a supportive and inclusive production environment and removing perceived barriers to joining the screen community.”**

Locality

Our research revealed that 23% of freelancers saw their locality as a barrier for progression within the industry, with many feeling that funding and support was often Cardiff-centric.

> **“In Wales being based outside of Cardiff is also a barrier - the Welsh industry seems to be very connection based/ capital based. Initiatives to address this seem top down, and not to do true, on-the-ground work to connect/ develop the expertise that is present outside of the CCR.”**

The logic underpinning the value of creative clusters rests on the belief that co-location of firms and talent in a city region improves economic performance. Being located outside of a large creative cluster, especially one that also has the benefits of being a capital city region, means that firms and workers can miss out on these benefits and may feel excluded from place-based networks and facilities.

Proximity to creative clusters across the border in England was significant for many freelancers, companies and training providers located in north Wales. One FE course leader noted:

> **“I mean Media City is on your doorstep really, and it is a shame you can’t go to Carmarthen or whatever for the Egin but I’m guessing transport links are just non-existent.”**

Genres

Our research found that for a large proportion of companies working within town microclusters they were heavily dependent on Public Service Broadcaster (PSB) commissions. One of the largest companies surveyed based in north Wales noted how 95% of its content is produced for PSBs. One area where PSBs have been essential in supporting business to grow is through the commissioning of returning series. One company noted how returning series allowed the company to invest in their post-production file delivery system and acquire studio space to house these series. In addition to supporting investment in infrastructure the returning series also allows companies to invest in staff. Investment in staff development directly addresses staff attrition rates. It is also seen as an important element in the growth and expansion of indigenous firms. Factual and unscripted content dominates the TV production sector outside the CCR. It provides the basis for jobs and training across Wales. As one company director put it:

> **“Low cost, high volume (i.e. daytime) factual series, especially for companies outside of CCR, should be appreciated for its importance in providing these companies with business development opportunities that they wouldn’t otherwise gain. These then act as a focus for developing new talent and providing practical production experience. Commissioning – and, just as importantly, RE-commissioning - these series provides a low risk option for broadcasters to demonstrate investment in Wales, but also supplies essential screen credits and production experience for smaller companies whose future success is vital for the broader ecology of the screen sector.”**

Investing in returning series also has a positive impact on training and for Equality, Diversity and Inclusion (EDI) agendas to be met.

Thematic Finding 4: Remote Working

COVID-enforced changes in working practices have altered how the screen sector operates profoundly. 55.6% of companies and 26.9% of freelancers surveyed listed remote working as the main change to working patterns as a result of COVID. The key message for most industries during the height of the pandemic was to work from home when possible. While this was not always feasible, many of those working in areas such as post-production, development (film and TV production), VFX and animation were able to adapt quickly through embracing technological solutions. One Production Manager explained how there is a growing need for post-production staff able to "work outside of a post-production house and across a new working from home post solution".

Remote Training: Innovations in Training Delivery

Our research found that during the various lockdowns the provision of remote training increased dramatically. As noted in the Screen Skills Assessment 2021 'Training was sought to help mitigate the impact of the pandemic'[12], and subsequently training providers, particularly membership organisations such as TAC and Bectu with extensive memberships worked to mobilise remote learning for their members. 68.8% of training providers surveyed (excluding FE and HE) noted they had provided training for in excess of 50 participants over the duration of 2020/ 21. If we look at CULT Cymru as a case study, they were able to run an extensive number of courses offered at discounted rates for their members. The Return to Work 4 Creative Workers scheme run by CULT Cymru and supported by Creative Wales provided training for over 200 freelancers from across Wales, many of whom were without work.

While COVID specific training around workplace safety became a priority particularly for those or returning to set/ production, CULT Cymru also ran business skills, digital, equality, mental health, and wellbeing, mentoring and coaching courses along with additional events. In total, 1389 participants took part in their courses or attended online events during 2020/ 21. The courses and events offered were dynamic and a direct response to the needs of the industries they service. One of the highest attended events run by CULT Cymru was 'From Stage to Screen', aimed at those with transferable skills from other sectors within the creative industries hit hardest by the pandemic. Traditional face-to-face courses in areas like hair and makeup were successfully delivered remotely. For example, CULT Cymru ran both an advanced and introductory Afro Hair workshop for hair and makeup artist.

For many of the training providers surveyed, the main success of online delivery was accessibility. In addition to reduced rates in some instances, remote learning allowed people to

[12] https://www.screenskills.com/media/4587/2021-06-08-screenskills-assessment-2021.pdf

attend regardless of their locality. However, despite the increase in opportunities, only 38.5% of pan-Wales freelancers surveyed undertook training during 2020/ 21 compared with 53.3% of freelancers from within the CCR (based on a small sample of CCR freelancers). These figures indicate disparities in training uptake between freelancers within and outside of the CCR despite the accessibility offered through remote learning. Our research also found that of those undertaking online training pan-Wales, 50% attended role-specific training courses, 40% COVID-specific Health and Safety, and 10% equality training. 20% of freelancers undertaking role-specific training noted how these were existing training programmes where learning moved online as a result of the pandemic. In every instance, these courses were run by Cardiff-based institutions or studios, meaning that participants had previously needed to travel to attend. 75% of those undertaking training within the CCR attended role-specific/ progression training.

Our research identified growing concern from within the industry that remote working may have a detrimental impact on training opportunities available in the sector. One training provider explained how some roles have "traditionally been trained on the job (such as colourists)". With both the increased demands placed on the industry and remote working, opportunities for those seeking to progress in these fields may become increasingly harder.

With many senior and experienced staff and freelancers working remotely, fewer mentoring opportunities exist for entry level and junior roles, particularly in areas of post-production. With reference to the dramatic changes seen in the coverage of large sporting events[13] like the Olympics and 2022 Commonwealth Games, Executive Chair of one of Wales' largest media groups explained how:

> **"the industry will never return to how it once was, and that's a real threat to training – because the people are not together. TV is effectively a team sport and I'm struggling to see how we make it work [from a training perspective]."**

Case study: Mentoring Scheme

There have been some successes with remote mentoring schemes such as Mentoring 4 Screen through Bectu/ CULT Cymru (supported by ScreenSkills and the Welsh Government's Wales Union Learning Fund). The scheme offers 6 free monthly mentoring sessions for successful candidates and is open to both new entrants and those wishing to progress in their careers. More is needed to support and facilitate remote training opportunities due to the changes seen to the production landscape and working patterns. In total CULT Cymru were able to support 29 freelancers from across Wales through the online mentoring scheme during the pandemic. A further 25 mentoring pairs have started a new programme with 28% of participants identifying as disabled.

[13] https://olympics.com/ioc/news/top-olympic-broadcasters-reveal-how-covid-19-has-affected-plans-for-tokyo-2020-and-beyond

Geographic Disparities

Remote working has enabled more 'flexible, considerate working practices'[14] for many. However, remote working brings additional challenges that exacerbate geographical disparities, particularly for those in rural areas. The increased demand on home broadband brought by the pandemic was exacerbated for many due to the nature of their work especially those working in post-production:

> **"I've been editing content remotely for some years now but this year I've had to edit, grade, dub and so on remotely, which is hard with weak connectivity."**

Currently Wales is lagging behind when it comes to ultrafast broadband availability and 4G mobile coverage compared to the rest of the UK[15]. Ofcom's latest figures from May 2021 reveal that Wales has the lowest access to ultrafast broadband with 40% coverage compared with 62% in the rest of the UK.

According to Screen Skills Assessment 2021, 54% of employers surveyed saw remote working as a means of 'hiring from a wider geographical pool'[16]. Some raised concerns that this would negatively affect freelancers in Wales.

The move to remote working may bring about changes to the labour market and increase opportunities to work both inside and outside of Wales. However, it might also mean that work migrates away form freelancers in Wales. As one respondent working in animation noted:

> **"There's a lack of opportunities in Wales and with more people working from home, the jobs thin out quicker due to remote working being more widely available."**

[14] https://www.screenskills.com/news/new-research-shows-industry-optimistic-of-positive-change-post-covid/
[15] https://www.ofcom.org.uk/__data/assets/pdf_file/0013/224212/connected-nations-summer-2021.pdf
[16] https://www.screenskills.com/news/new-research-shows-industry-optimistic-of-positive-change-post-covid/


S4C Stock image

Conclusion

Screen Survey Wales 2021 provides an evidence base to develop and deliver an action plan for screen skills across Wales. It provides a snapshot of the film and TV production sector in those areas of Wales that are less likely to receive critical attention than the more high-profile Cardiff Capital Region cluster. Regional clusters may be smaller in size, but their regional impact is very significant. They can help drive improvements in fair work, improved job opportunities and a more equitable distribution of public funding to enable talented learners, workers and businesses to thrive wherever they are based. Culturally, the concentration of the screen production sector in the CCR may skew the imaginative power of film and TV to tell stories that reflect the diversity of Wales' people.

The COVID19 pandemic has accelerated uptake of remote working and training practices and demonstrates that geography need not be a barrier. However, geography still shapes the chances of businesses, learners and screen sector workers. The UK remains a hugely centralised state and this centralisation is also visible in Wales. This pandemic, coupled with the growth of Wales' screen sector, makes 2022 the time to develop and deliver an action plan driven by the values of social justice, sustainable business growth, and genuine inclusion for all creative talent wherever it resides. The time is now.

About the Authors

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Phoebe Lacey-Freeman (BA Theatre and Drama) and Megan Franzen (BA Popular and Commercial Music) joined the team as research assistants as part of the graduate internship scheme.

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The Centre for the Study of Media and Culture in Small Nations, University of South Wales was established in 2006 as a means of co-ordinating and supporting the research of academic staff in the areas of media, culture, communication, theatre, and performance, much of which has focused on the creative industries in Wales and the wider economic, social and political contexts in which these industries operate. The Centre is based in the Faculty of Creative Industries, University of South Wales. It works closely with Film and TV School Wales.

Creative Wales was established within Welsh Government in early 2020. Its mission is to drive growth across the creative industries, build on existing success and develop new talent and skills – positioning Wales as one of the best places for creative businesses to locate and thrive.

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