Wales Screen Workforce Survey
2026

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Background to this report

This report is produced by the University of South Wales for Media Cymru, part of UK Research and Innovation's (UKRI) flagship Strength in Places Fund supported by Cardiff Capital Region, Creative Wales, and industry and university partners.

Media Cymru is a consortium of 22 partner organisations all with one aim, to turn Cardiff Capital Region into a global hub for media innovation and a driving force for sustainable and inclusive economic growth in the Welsh media sector. Media Cymru is a 5-year project funded through £22m from the UKRI Strength in Places Fund, £3m from Cardiff Capital Region, £1m from Welsh Government, through Creative Wales, and £23m match funding from industry and university partners.

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Open Data:
https://pure.southwales.ac.uk/en/datasets/games-survey-wales-company-data-2024/

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Key Findings

Age

The 2026 results highlight a trend towards an older, more experienced workforce, with a severe drop in younger workers, suggesting a decline in entry-level positions and newer entrants.

Employment

There has been a considerable drop in the proportion of the workforce employed on a full-time, permanent basis (from 44% in 2022 to just 28% in 2026). That deficit appears to have mostly been absorbed by a rise in freelance work (40% in 2022 to 46% in 2026) and those out of work (3% in 2022, 8% in 2026).

Recruitment

Recruitment practices show an increased reliance on informal networks, personal contacts and word of mouth to source job opportunities, that runs the risk of undoing what progress has been made in terms of more diverse and open recruitment and employment.

Disability

Representation of those who consider themselves to have a disability or impairment has almost doubled within the sector since 2022 (23% in 2026 vs. 12% in 2022), and closer to Wales's national population.

LGBQ+ Representation

The Welsh screen sector continues to be well-represented by Lesbian, Gay, Bisexual and Queer groups, with the proportion of the workforce increasing since 2022 (16% - 22%), and is representation is considerably higher than in the national Welsh population (4.5%).

Location & Mobility

In 2022, 60% of respondents had worked in more than one location (county) in the previous 18 months, for 2026 this has increased to 92%. People are traveling more for work. The most popular destination for work, after Cardiff, was outside of Wales entirely.

Skills and Training

There has been a rise in the level of training undertaken (58% in 2026 vs. 29% in 2022), yet we see evidence of persistent barriers to training, including cost, training location, and complex application processes. 63% of respondents selected more than one barrier, indicating how multiple barriers can intersect and stack.

Respondents were predominantly undertaking free training opportunities, or looking to get that training cost paid for by a third party. Few paid for training themselves (17%), and employers' support of training is very low (22%).

Skills for innovation

63% of respondents believe they have the skills to engage in Research and Development (R&D), and innovate now. However, more than half (53%) are currently not involved in any innovation or R&D activity, suggesting that the screen workforce in South Wales now has excess absorptive capacity for R&D and innovation activity that is currently untapped.

The workforce sees opportunities for innovation in areas such as emerging technologies – including AI – new business models and formats that support growth, and shifting workplace culture to be more inclusive and open.

Sustainability and Carbon Footprint Reduction

There is evidence of a greater degree of environmentally sustainable action taking place on set, with more still to be done. Respondents demonstrate an awareness, and appetite, to make decisions to lower their carbon footprint, where feasible.

Leaving the screen sector

68% of respondents have considered leaving the sector, more than in 2022 (52%). Short and longer-term job insecurity and concerns around wider industry directions appear alongside more persistent concerns related to long working hours, stress and a poor work/life balance, underscoring the need for a continued focus on improving workplace culture.

Contents

1. Introduction

The creative industries in Wales are both economically and culturally significant. South Wales is home to one of the largest creative clusters in the UK, outside of London[1]. Welsh Government figures claimed an annual turnover of £1.5bn in 2023[2] alone. In addition, the creative and cultural industries play a significant role in representing and promoting Welsh talent, heritage and the Welsh language, both nationally and globally.

As part of Media Cymru, the University of South Wales (USW) has spent 2022-2026 developing and co-delivering an innovative skills programme linking higher education, industry, and infrastructure to build a sustainable talent base for the region's screen sector. Research has played an integral part in this work, in October 2022 we launched our first Wales-wide Screen Workforce Survey. That survey had three main objectives. The first was to understand the demographics of the workforce, who is working in the industry, who is represented, and who are facing challenges. The second objective was to understand current, and future, priorities for skills and training, building a forward-facing and innovative portfolio of training provision. This portfolio included developing the understanding and capacity to participate in Research, Development and Innovation (RD&I) activity. Finally, we sought to understand the cultural health of the workforce, what workers love about screen work, but also what gives cause for concern. Beneath these themes lay a desire to understand what sets the Welsh workforce apart from the rest of the UK, and what that landscape looks like in distinct parts of Wales. In 2026, the final year of Media Cymru, we have run this survey again.

It has been a turbulent few years for the screen sector and the wider creative industries. The early phase of Media Cymru dealt with a sector emerging from the COVID-19 pandemic, into a period of production boom. Employment was plentiful, and looked set to continue. The intervening period, however, has been volatile. In 2023, concerns of the rapid acceleration and proliferation of Generative AI, pay rates and residual compensation from streaming services resulted in 118 days of SAG-AFTRA strikes in the US[3], and a prolonged period of production slowdown amid uncertain global economic conditions, which has had a considerable impact on production work in the UK, including in Wales. In 2025, trade union BECTU reported just under half the workforce in scripted and unscripted TV reported being out of

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[1] https://clwstwr.org.uk/sites/default/files/2021-01/Clwstwr%20Creative%20Industries%20Report%20No%202%20the%20media%20sector%20in%20the%20Cardiff%20Capital%20Region%20-driving%20economic%20growth%20through%20audiovisual%20activities.pdf
[2] https://www.gov.wales/latest-figures-show-creative-boom-wales-boosting-economy
[3] https://www.bbc.co.uk/news/entertainment-arts-67613609

work, with as many as 68% admitting they were struggling to make ends meet[4]. Screen work has long been scrutinised, with critical scholars identifying it as a sector suffering from high workforce attrition rates, continued lack of diversity, long working hours, poor workplace culture and its subsequent impact on wellbeing and mental health (Farrell and Morris, 2013; Eikhof, 2020; Mackenzie and McKinlay, 2020). While attempts have been made to address some of the screen industries' more entrenched inequalities, barriers and weaknesses in workplace culture, there are concerns that current conditions my undermine, stymie or even reverse any progress made with regards to well-being, sustainability, accessibility and inclusion.

Therefore, the *Wales Screen Workforce Survey 2026* once again adopts a bottom-up, workforce-centric approach. Where possible, questions in the new survey have remained consistent with those posed in 2022, in order to offer direct comparison. In some cases, questions have been redesigned or categories reprofiled (see Methodology and Appendix 2).

Data has been collected with a view to providing updated results across five main themes:

1. Workforce demographics
2. Skills and training priorities
3. Innovation capability and capacity
4. Well-being, health and working culture
5. Environmental, economic and social sustainability

The following section outlines the methodological approach of the survey and offers some more details on key differences between the 2022 and 2026 designs.

2. Methodology

The aim for the 2026 survey has remained broadly the same as in 2022; build a sustainable talent pool for the region's screen sector by establishing a robust evidence base. Three main research aims underpinned the redesign of the survey:

1. Up-to-date and comparable demographic and employment characteristics of the Wales screen sector workforce.
2. An evaluation of the provision of training – from Media Cymru and elsewhere – as a means to building the capacity to design and participate in innovation and R&D activity.
3. Understand the current challenges facing the screen sector workforce.

[4] https://bectu.org.uk/bectu-big-survey-hub/

Online surveys have their strengths in their speed, flexibility, ease of completion, question diversity and the ability to reach a large sample (Evans and Mathur, 2005; Van Selm and Jankowski, 2006). Iterating on the original 2022 survey design, the *Wales Screen Workforce Survey 2026* survey has improved in several ways.

Firstly, the survey was streamlined to reduce completion time and limit the need for long text responses. Survey length is an important consideration to ensure engagement and completion rates are as high as possible (Braun et al., 2021). The 2026 version contained 63 questions (seven fewer than in 2022), and several open-ended questions were converted into 'select-all-that-apply' formats using the coding framework developed for the 2022 survey. All questions remained optional and included both 'prefer not to say' and 'other' (self-describe) options. For a full list of questions that have been added or changed since 2022, please see Appendix 2.

Secondly, key demographic questions were updated in line with the UK Government Statistical Service (GSS) harmonized standards[5] to ensure consistency with national guidance. Particular care was taken to include open-ended response categories, allowing participants to define themselves in their own terms, especially in relation to protected characteristics such as gender identity, sexual orientation and ethnicity (Braun et al., 2021).

Thirdly, we sought more granularity and detail around current levels of capacity, capability and activity in Innovation and Research & Development (R&D). Key additions to the 2026 survey included more robust sections on Employment, Socioeconomic Status, Innovation and Sustainability.

The section on Changing Working Culture now also includes questions relating to Workplace Accessibility.

Allowing respondents the opportunity to self-select their employment status (Full time/part time, on a permanent or temporary contract, or a sole trader or freelancer) allowed for a single survey format to cover a range of more statistical demographic questions, including gender identity, ethnicity, work location, age and caring responsibilities, as well as more qualitative responses (Braun et al., 2021) with regards to attitudes to future ambitions, training priorities, workplace challenges and issues related to the impact of screen work on work/life balance, mental and physical health.

In 2022, the survey opened for responses in mid-October, running until the end of the following January. The 2026 survey ran for three months, starting mid-January and closing at the end of April 2026. The 2026 survey drew on an extensive contact list.

[5] https://analysisfunction.civilservice.gov.uk/government-statistical-service-and-statistician-group/user-facing-pages/gss-harmonisation/harmonised-standards-and-guidance/

Surveys went out to all those who had participated in the original survey and provided their consent and details to be contacted about future research.

All participants of USW's Media Cymru training who also consented were contacted. Additionally, the survey was shared on Media Cymru's newsletter, and circulated through regional freelancer networks and employment forums. As such, while the potential for a bias of the data in this case must be acknowledged, results in Training Support indicate that respondents engaged with a variety of different training courses and providers, when asked how their training was funded, only 24% of our respondents had received training from Media Cymru x USW. In total, the 2026 survey collected 146 unique responses. In 2022, there were 424 responses. Throughout the findings that follow, where appropriate we acknowledge the considerably smaller sample size for the 2026 result.

All data collection was subject to approval by the Research Ethics and Consent Panel at the University of South Wales. Ethical approval was granted on 17th December 2025 (Ref: DAVI-FBCI-LT-2425). This research is governed by Media Cymru's overarching Research Ethics Framework. The surveys were available for completion electronically, hosted by Jisc's Online Surveys tool, available in both Welsh and English languages. All responses are anonymous. Where appropriate, any qualitative responses are presented as anonymised quotations.

The following sections provide the updated 2026 results. As USW's focus within the project structure is upon skills and training provision, those questions have their own section, and are also considered in terms of innovation, sustainability and wider employment. Additionally, we have slightly restructured the findings around the demographics of the workforce. This following section offers some more descriptive detail on the current picture of the screen workforce based on our data, which is then followed by some supplementary discussion, considering some of the more notable characteristics and patterns evident in the results more closely. We then consider employment, the landscape of skills and training and innovation capacity. The final sections of the survey present some findings that relate to workforce culture change and environmental sustainability, before providing some conclusions.

Findings

3. Demographics

This initial section provides an overview of the key demographic profile of the Welsh screen workforce. The aim is to offer a current picture of the industry, in terms of key characteristics including current age profiles, gender identity, sexual orientation, ethnicity, location of work, disability (including both physical and mental/neurological conditions), location, caring responsibilities and socio-economic background. In short, we want to know who is working in the industry, and how that has changed since the previous survey, conducted in 2022. Where comparison is possible, the new data are presented side-by-side with the previous results. The following section (Section 4) expands upon some of these results with further discussion.

a. Age

Figure 1 shows side-by-side comparison of the age distribution of the screen sector workforce in Wales, comparing the picture in 2026 with that of 2022. The starkest differences are displayed in the considerable drop-off amongst the 21-25 bracket (2.1% of respondents in 2026 vs. 10.6% in 2022), alongside a significant increase in workers aged 51-60 (2026: 22.6% vs. 2022: 13.2%). The largest proportion of the screen workforce remain between the ages of 31-50. These results highlight a trend towards an older, more experienced workforce, though a severe drop in younger workers suggesting a decline in entry-level positions and newer entrants.

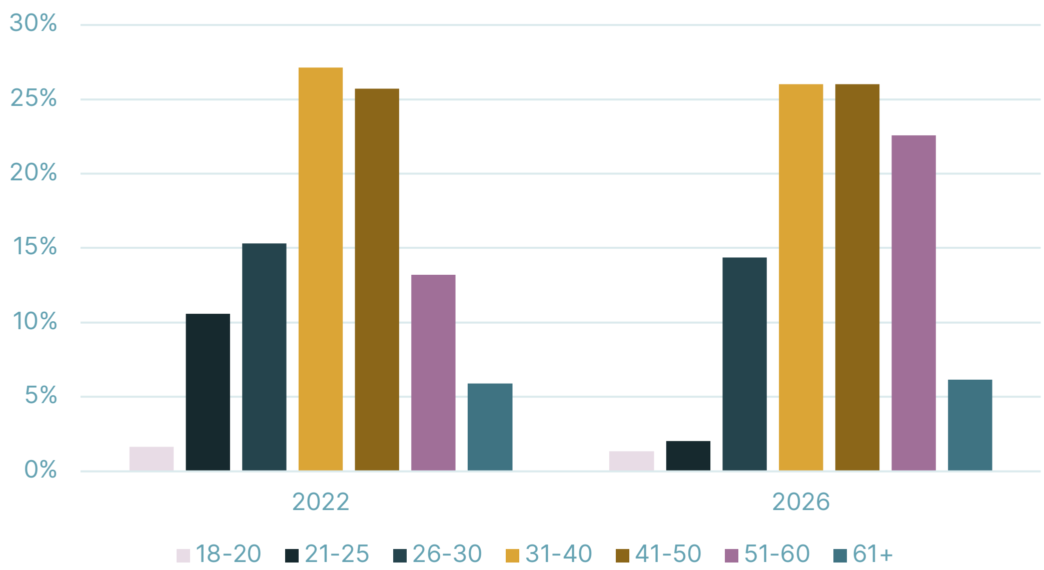

Figure 1: Screen sector workforce age, 2022 & 2026.

b. Ethnicity

When comparing the level of ethnic diversity within the sector between 2022 and 2026 (Figure 2), we see a slight improvement in the representation of workers from Global Majority or mixed ethnic backgrounds (10% in 2022 vs. 8% in 2022). That said, the sector remains heavily dominated by those from white backgrounds (around 90% in both cohorts).

There are a couple of further points to note in relation to ethnic diversity. Firstly, the national population of Wales shows lower representation (6.6% - National Survey Wales/Welsh Gov, 2025) of those from non-white backgrounds than the national UK population (18.3% UK Census/HMG, 2021). As such, the figures here for the screen sector trend slightly above the general Welsh population statistics. Secondly, as noted in Section 3e below, the vast majority of the screen workforce in Wales is based in and around the Cardiff Capital Region, the most urban, populous and ethnically diverse part of the country, and home to around 1.5m people, or half the total population of Wales[6].

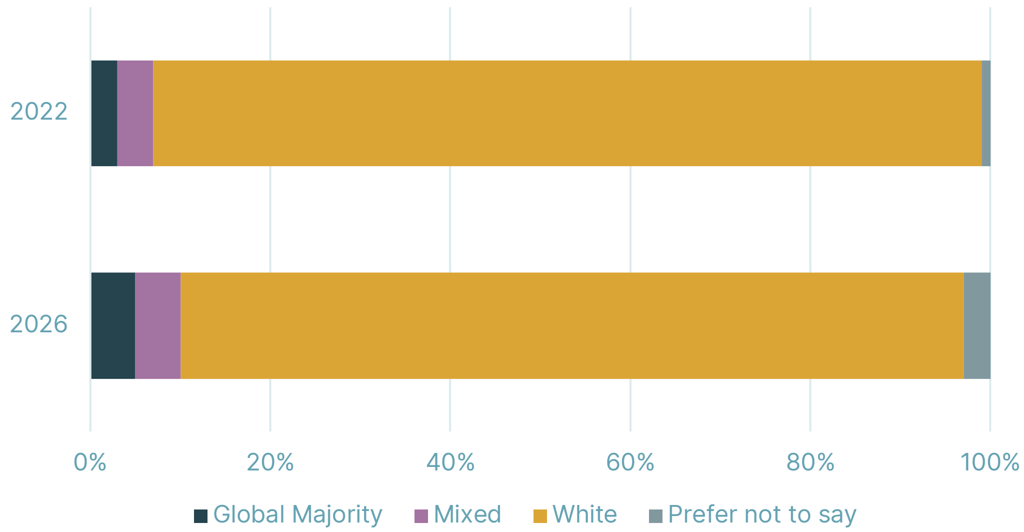

Figure 2: Ethnicity of the Wales Screen Workforce, 2022 & 2026

[6] https://www.cardiffcapitalregion.wales/about-ccr/

c. Gender Identity

Figure 3 shows a comparison of gender identity responses between 2022 and 2026. There is very little change between the two cohorts, a slight rise in female representation (42.5% in 2022, rising to 44.8% in 2026), and a concurrent drop in male representation (a 1%-point change from 2022 to 2026). Non-binary workers remain represented by 2.1% of respondents.

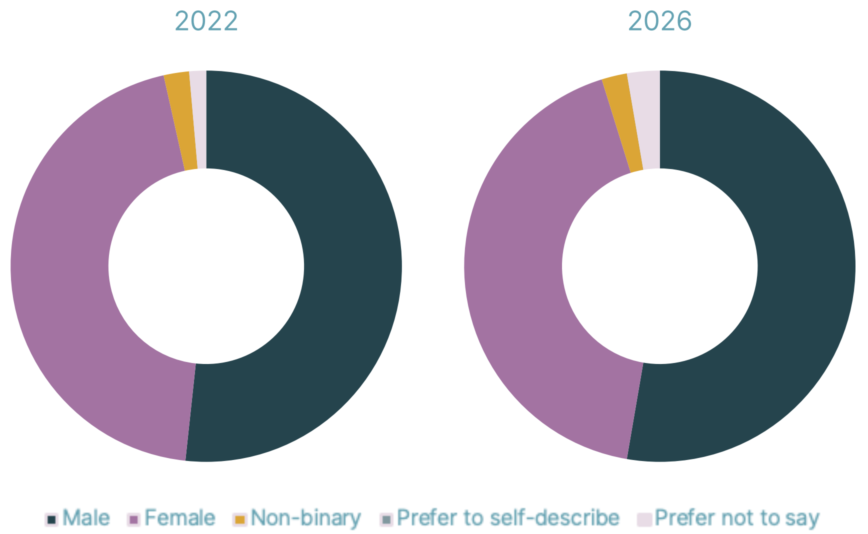

Figure 3: Gender identity, 2022 (left) & 2026 (right)

d. Sexual Orientation

LGBQ+ representation has increased since 2022, those identifying as a gay man or woman, bisexual or preferring to self-describe their sexuality has risen from 16% to 22% of respondents (Figure 4). The screen sector remains very well-represented in comparison to the national population of Wales, figures from Welsh Government in 2025 showing only 4.5% of the national population do not identify as heterosexual[7].

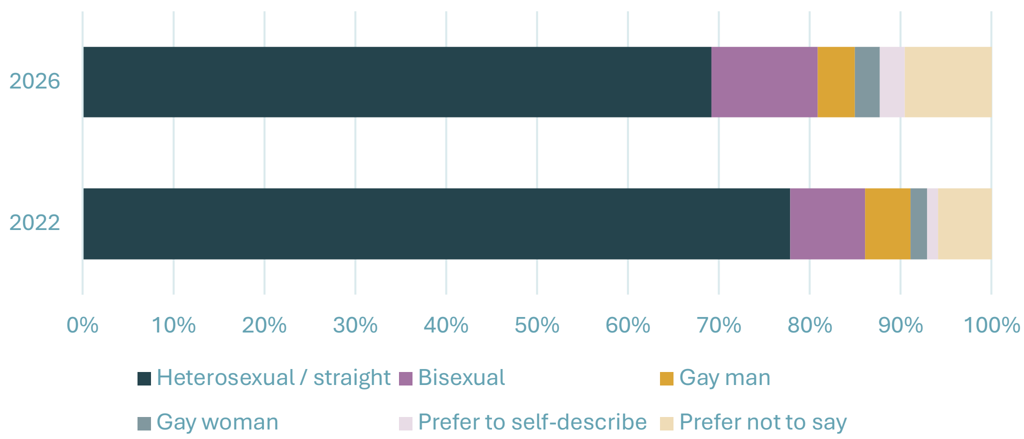

Figure 4: Sexual orientation, 2022 & 2026

[7] https://www.gov.wales/national-survey-wales-results-viewer-dashboard

e. Location & Mobility

Figure 5 shows a colour-coded geographical distribution, by Local Authority Area (LAA) of the places of residence of respondents to the 2026 survey, lighter shades denoting the lowest percentages of workforce, through to the darker shades for the most concentrated areas. Cardiff has the highest proportion of the workforce, with almost half of respondents (46%) living in the LAA.

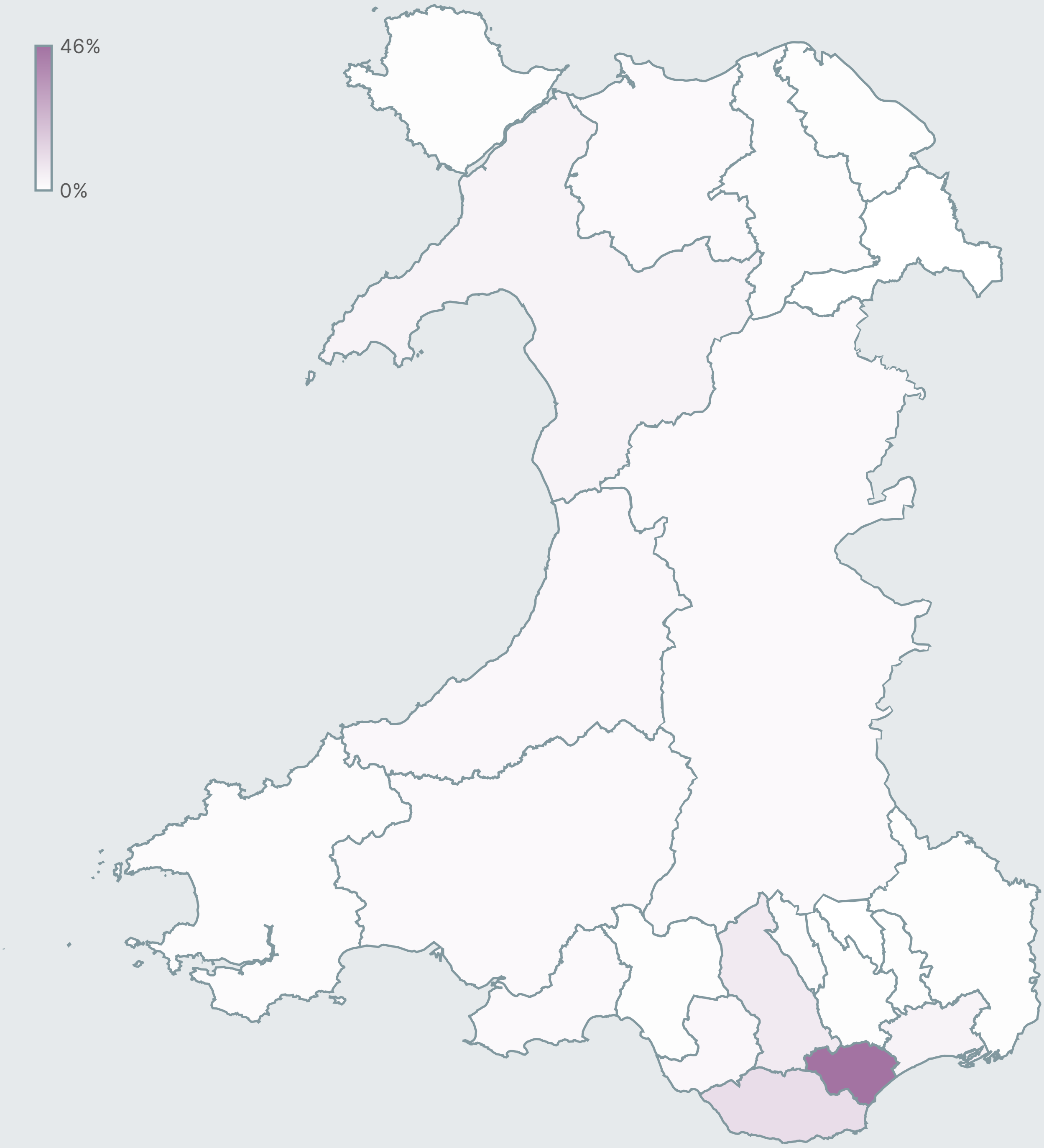

Figure 5: Place of residence of Welsh screen sector workforce, 2026

Additionally, the Cardiff Capital Region, a Corporate Joint Committee (CJC) of 10 local councils across South-East Wales, is home to 74% of respondents, reflecting the highly concentrated nature of screen sector work in the South-East of Wales.

With the vast majority of the screen sector workforce based in and around the city of Cardiff (Location), it was also salient to investigate what level of mobility was required from the workforce to travel to work. In 2022, 60% of respondents had worked in more than one location (county) in the previous 18 months, for 2026 this has increased to 92%. People are traveling more for work. We see a highly itinerant, and mobile workforce, perhaps most notable here is that work either takes place within Cardiff (53%), or outside Wales entirely (12%).

f. Disability

Respondents were asked if they considered themselves to have a 'disability, impairment or a long-term physical or mental health condition.' The results are shown in Figure 6, alongside results from 2022. Representation has almost doubled within the sector since 2022 (23% in 2026 vs. 12% in 2022), and closer to Wales' national population, which the 2021 UK Census[8] reports at 21%, and the National Survey for Wales[9] in 2024/25 report at 36%, but also include 'infirmity.'

It is, however, salient to highlight that this increase may not as straightforward as more workers with disabilities entering the sector, and may instead be a reflection around a larger conversation around physical and mental health, including neurodivergence, that results in more people recognising themselves as belonging to a particular group. In either case, a greater level of visibility around these factors is a positive step for the workforce culture.

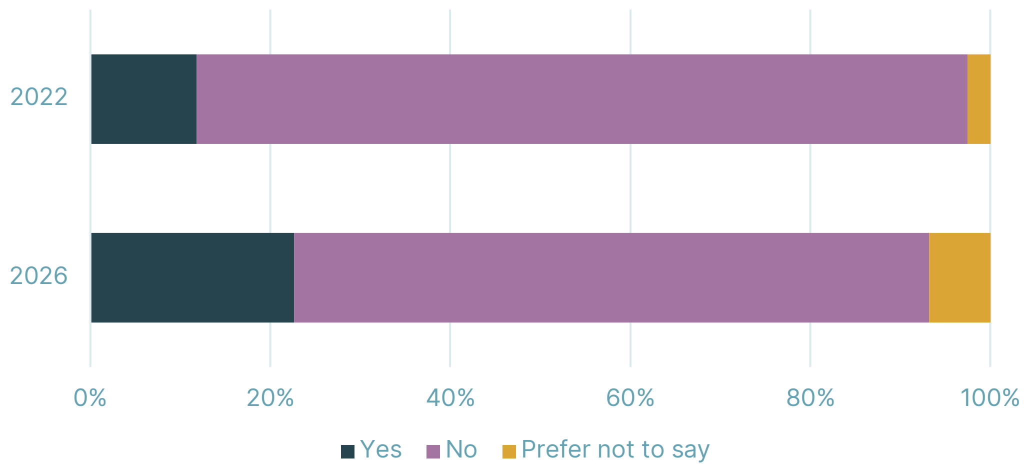

Figure 6: Do you have a disability, impairment, or long-term physical or mental health condition?

[8] https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/disabilityenglandandwales/census2021

[9] https://www.gov.wales/national-survey-wales-results-viewer-dashboard

g. Caring Responsibilities

The proportion of respondents who reported no caring responsibilities (Figure 7) has risen since the 2022 survey, with 58.2% of the 2026 workforce, in comparison to 51.7% four years ago. This shift is likely to be linked to the generally older, more senior workforce with grown children, and an attrition of those with caring responsibilities due to a challenging work landscape.

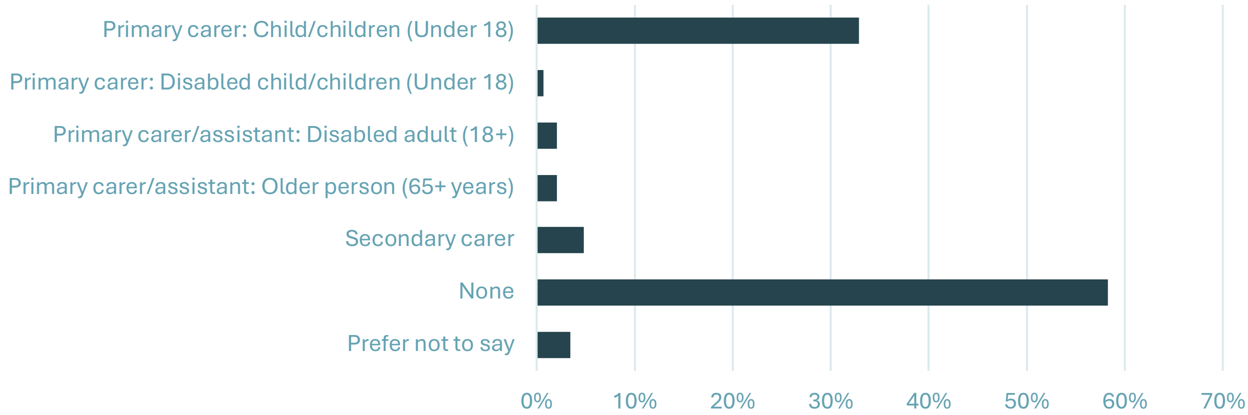

Figure 7: Caring responsibilities among screen sector workforce, 2026.

h. Welsh Language Level

Just under a third (29%) of respondents in 2026 identified themselves as being able to speak Welsh fluently. This is considerably higher than the national average for Wales - statistics from Welsh Government suggesting around 10% of the general population consider themselves fluent in Welsh[10] - but a drop from 2022, where the percentage of fluent Welsh speakers was 37%. Just under half of respondents (44%) to our survey in 2026 reported some proficiency in Welsh language. This is a smaller proportion than in 2022 (57%). It is, however, also above the national average (36%) in 2024/25.

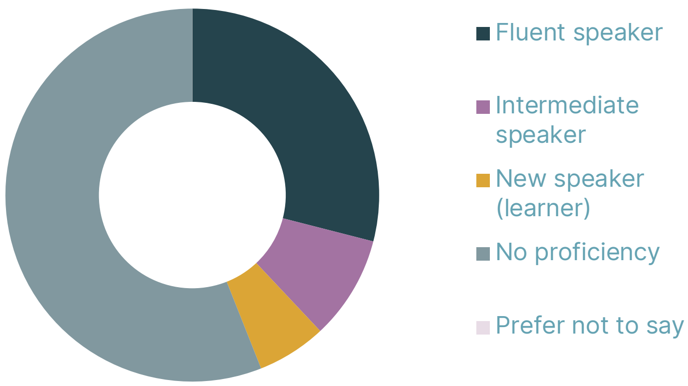

Figure 8: Welsh Language Ability, 2026

[10] https://www.gov.wales/national-survey-wales-results-viewer-dashboard

i. Socioeconomic Status

The figures below provide three metrics through which a general level of socio-economic status may be inferred; level of education, current household income (against the UK average of £37,430[11]), and parents' occupations when the respondent was around 14 years old. The data here show a familiar picture, in terms of a screen sector dominated by those from more privileged socio-economic backgrounds (Holt-White, O'Brien, Brook and Taylor, 2024). 84% of the workforce in 2026 are educated to undergraduate degree level or higher, slightly higher than in 2022 (82%) (Figure 9).

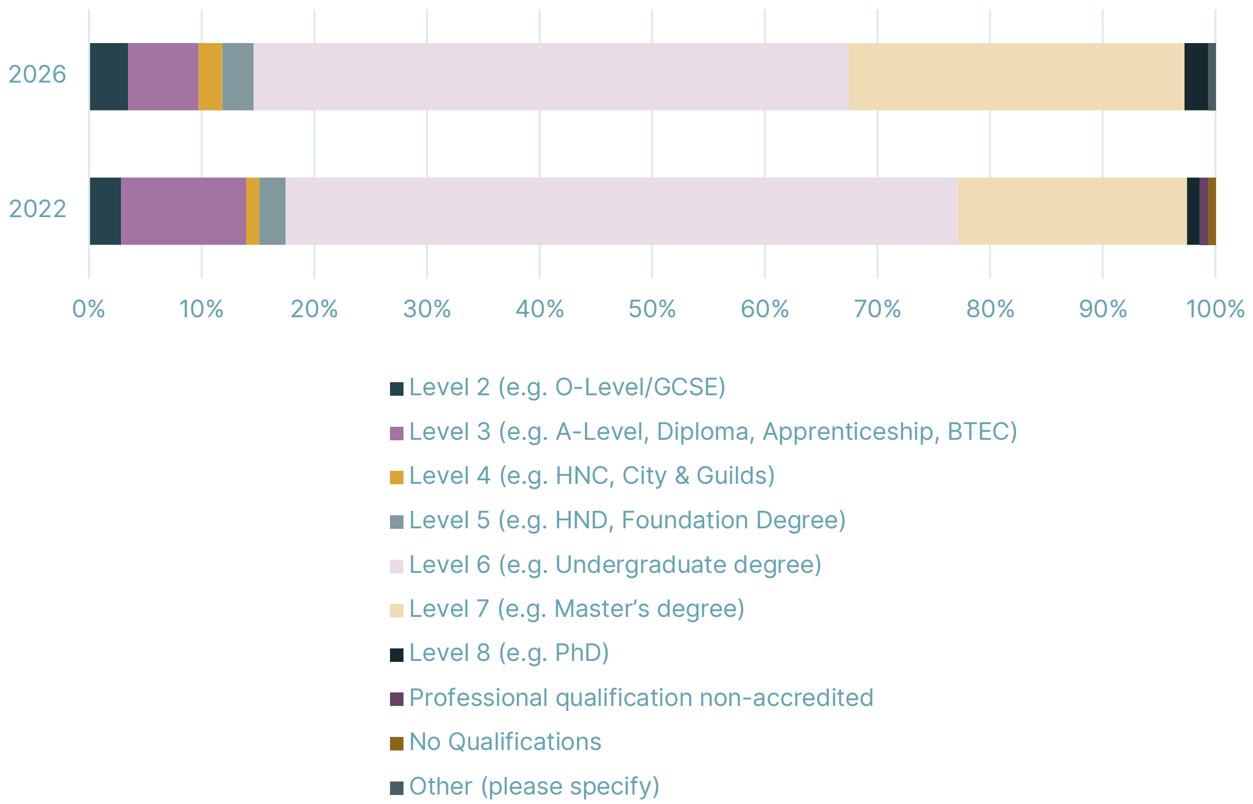

Figure 9: Highest education level attained, 2022 & 2026

The percentage of the workforce that holds a Level 7 qualification (e.g. Master's degree, Higher Apprenticeship, Postgraduate diploma) has risen from 20% in 2022, to 30% in 2026. While almost half of respondents (49%) are part of households that earn more than the average wage (Figure 10), 27% earn lower than average, suggesting a process of 'hollowing out' has taken place, separating well-off senior workers from those struggling in more junior positions and struggling to find work (More detail on this in the Characteristics of the Welsh Workforce section).

[11] The average (median) annual income for full-time employees in the UK for the year ending 2024 is £37,430 (Source: ONS).

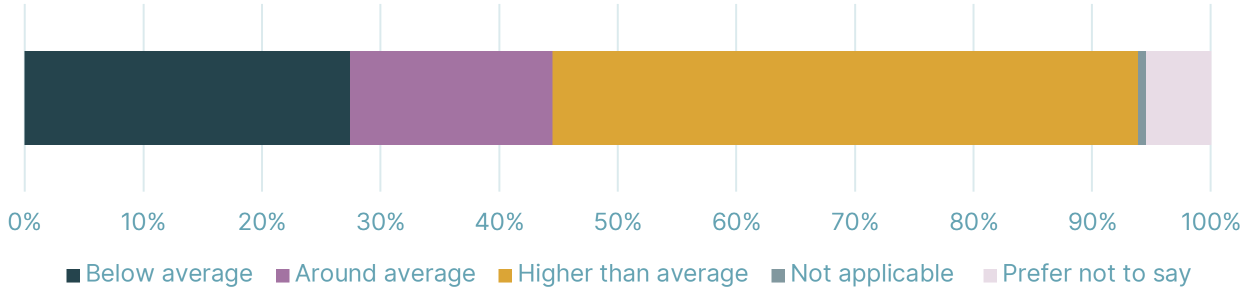

Figure 10: Is your annual total household income above or below average (including benefits and excluding deductions)?

Additionally, 63% of respondents reported their parents were in professional[12] or managerial[13] occupations when they were 14 years old (Figure 11).

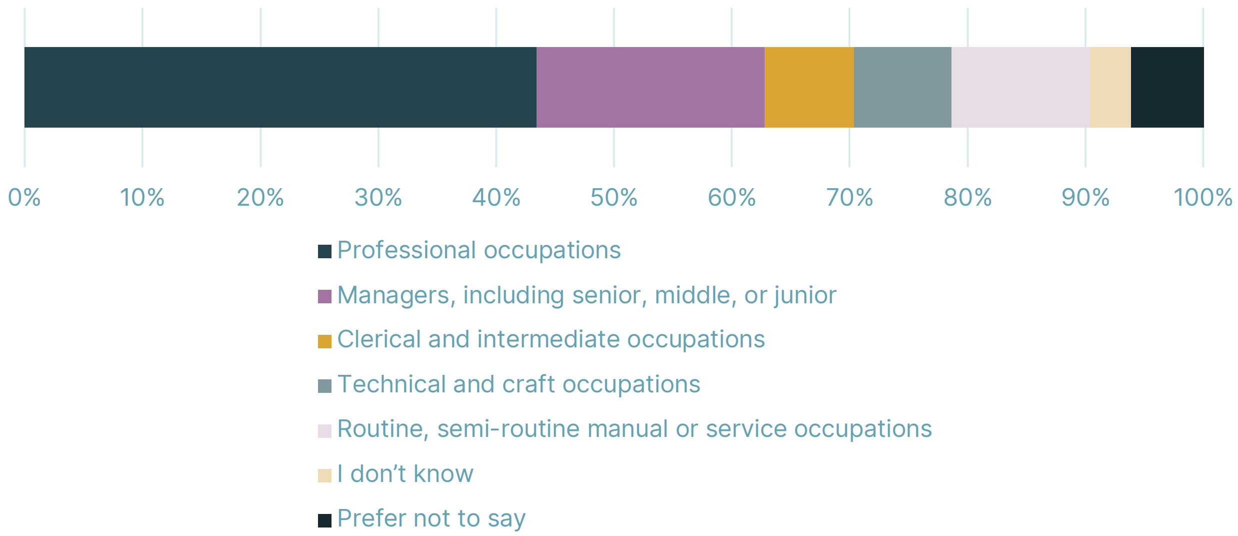

Figure 11: When you were aged about 14, what was the occupation of the main or highest income earner?

What we see here is a workforce that is predominantly well-educated, well-paid and from a background of privilege.

[12] Such as teacher, nurse, physiotherapist, social worker, welfare officer, artist, musician, software designer, accountant, solicitor, medical practitioner, scientist, or engineering professions

[13] Managers, including senior, middle, or junior, such as finance manager, chief executive, office manager, retail manager, bank manager, restaurant manager, warehouse manager

4. Characteristics of the Welsh Workforce

The following section seeks to expand on some of the discussion points provoked by the findings in Section 3. It considers the shape of the screen sector in more detail, explores the different sub-sectors represented and the demographic shifts between 2022 and 2026, in terms of age, seniority and gender.

a. Screen Industry Subsectors

The screen workforce in Wales is still predominantly employed in the Scripted and Unscripted Film and Television sub-sectors. Figure 12 shows the 2026 results alongside 2022, showing things have remained relatively static, with only animation having a notable change (just 6% of the 2026 workforce, in comparison to almost 11% in 2022). Another shift to mention is the rise in those selecting the 'Other' option, for emerging work that does not fall neatly into an established sub-sector. Most mentioned in this category is 'Immersive', suggesting a workforce with capacity to work in a nascent sector, with opportunities for innovation and growth. This trend is observable again, when looking at potential Opportunities for Innovation (Section 7c).

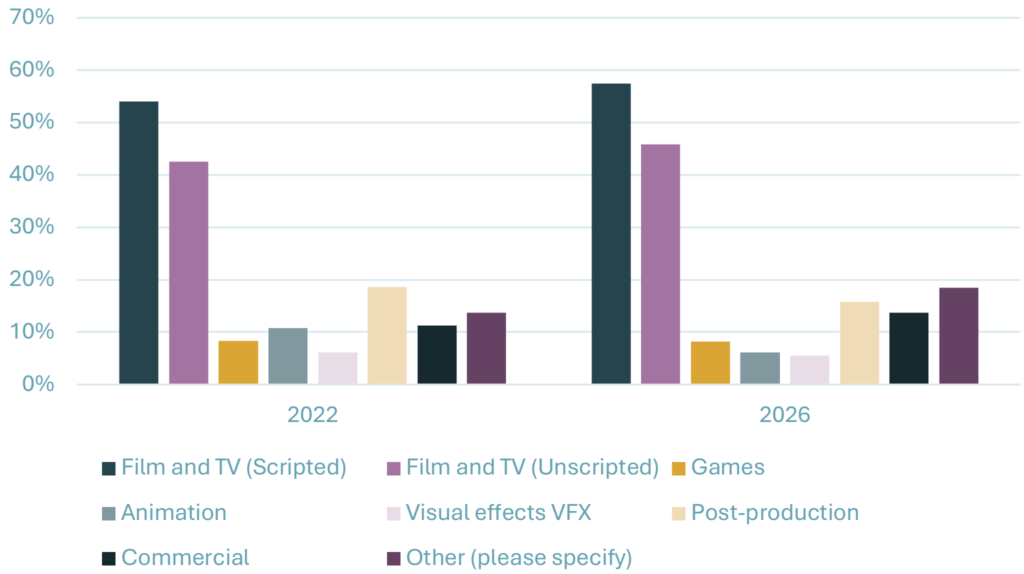

Figure 12: Activity by screen industry subsector, 2022 & 2026

b. Age & Seniority

Figure 13 below plots age against seniority of position. Seniority is based on respondents given an option to select the most appropriate descriptor from the list provided. Alongside the upward trend in age, in comparison to the 2022 results, we see a high proportion of representation within the Mid-level (27%) and Senior/Lead/Department Head (39%) positions.

The sector's workforce has got older, previous new entrants have either advanced to mid-level positions or left entirely. The largest single group in the 2026 sample were aged between 41-50, holding Senior, Lead or Department Head positions (15%). This more senior demographic have, unsurprisingly, also been in the industry longer; Figure 14 showing that the average time in the screen sector has risen amongst the workforce, in comparison to results from 2022.

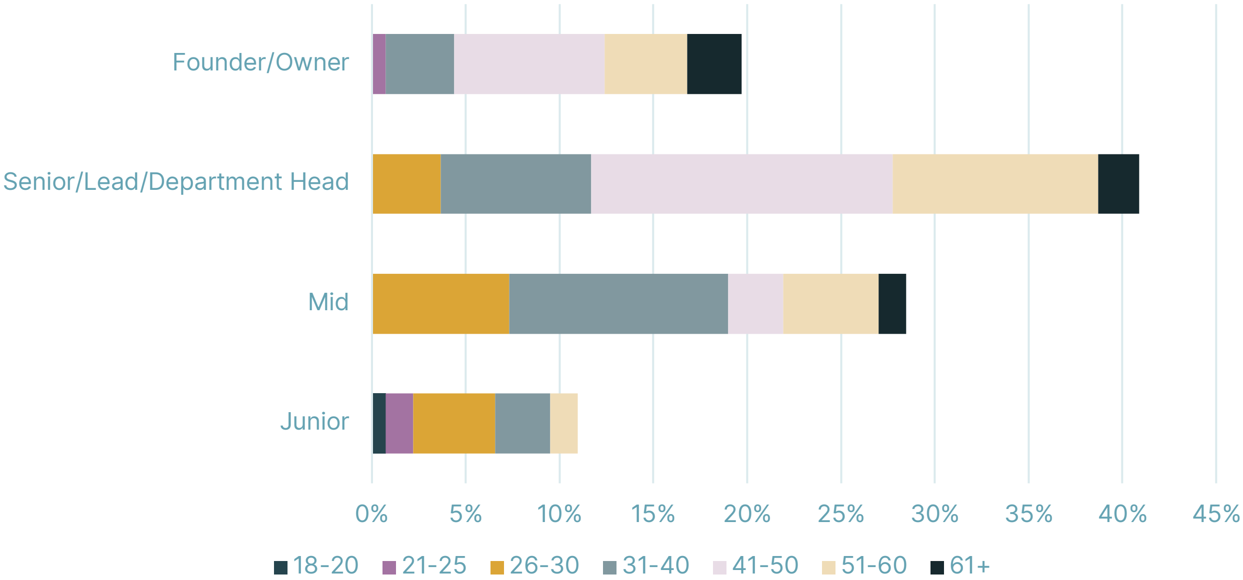

Figure 13: Age against Seniority of position, 2026.

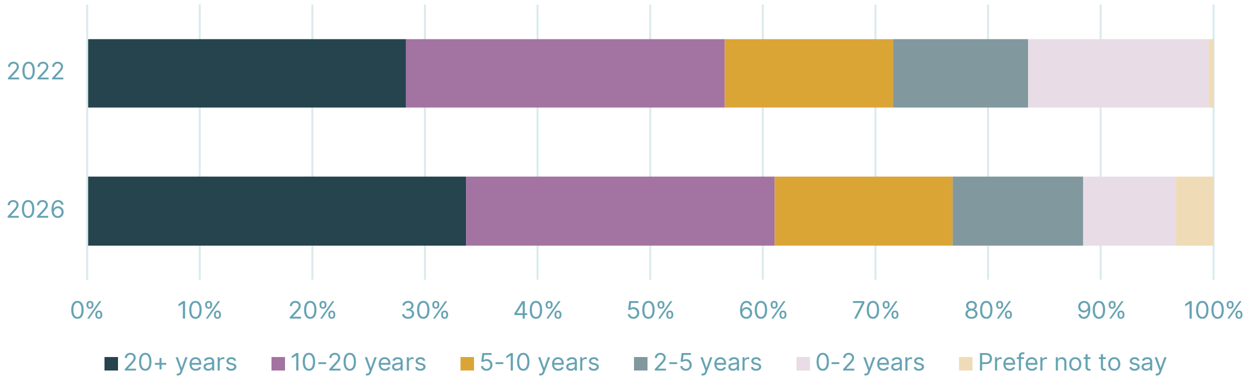

Figure 14: Time in industry, 2022 & 2026.

While we must acknowledge the potential for limitations in the sample size, however this trend has also been observed in other sectors, such as film exhibition (Creative UK, 2025; Bridge Group/Independent Cinema Office, 2026). The challenging production environment that has occurred since the post-COVID boom period of 2022-23 has placed considerable pressure on the workforce (BECTU, 2025). An apparent shrinking of the screen sector workforce around a centre of experienced, more senior workers seems to have taken place, and is congruent with other shifts we observe in these data.

c. Gender & Time in Industry

Figure 15 plots time in industry against gender for the 2026 cohort. While male and female percentages remain relatively even through 0-5 years (combined), 5-10 years and 10-20 years, we see a drop-off in terms of female representation in the 20+ years category, indicating an enduring paucity of females in senior roles. While the previous survey has highlighted the attrition rates of women around the age of 30, the higher relative age and seniority of this cohort seem to have pushed that ‘cliff edge’ even later into careers, and supports findings in other TV workforce research of an underrepresentation of women in senior roles (Diamond/Creative Diversity Network, 2024).

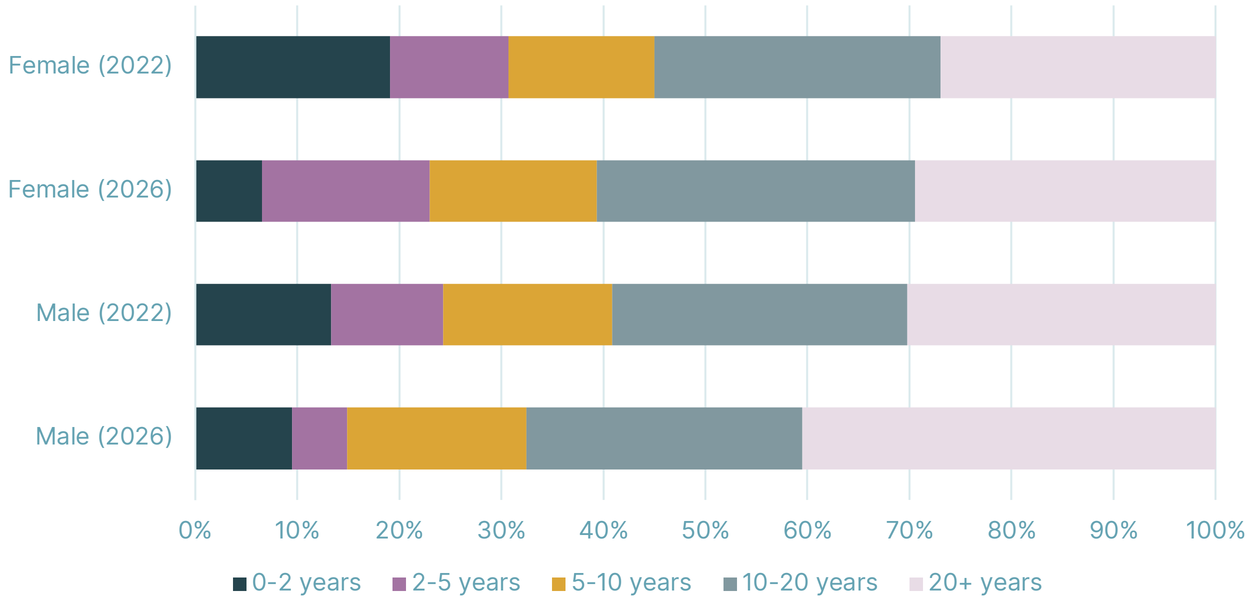

Figure 15: Gender against Time in Industry, 2026.

The previous two sections have provided updated statistics on the demographics of the Welsh screen sector workforce in 2026, and provided some discussion points on some of the more notable shifts. We see a workforce that has remained, in many ways, unchanged in terms of key demographic characteristics, particularly gender and socio-economic background. While non-white representation has improved, in comparison to 2022, the sector is still dominated by those from white backgrounds. Representation of those who consider themselves to have a disability or impairment, and those in LGBQ+ groups, has grown. Additionally, we have seen the average age of the sector increase, alongside parallel trends in seniority and time in industry, suggesting the production slowdown has had an impact in shrinking the industry around an older, more experienced workforce. We see a concurrent drop in younger workers, more recent entrants and those in junior roles. The following section explores various aspects of employment, including employment type, recruitment methods and work on productions in the Welsh language.

5. Employment

The section explores multiple aspects of employment. Where screen work has a history of relying heavily on freelance employment, and temporary contracts (Saundry et al., 2007; Grugulis and Stoyanova, 2011; Brook, 2016), we see evidence of an intensification of those patterns. This has implications for forms of recruitment, too (Section 5c). We also consider the extent to which the workforce is engaged in working on Welsh language productions, a USP for media production in Wales, and an important part of the shaping of the national identity of the sector. We begin by focusing on the most common forms of employment type.

a. Employment Type

Figure 16 below shows the most popular forms of employment type for the two cohorts, 2022 and 2026. The most striking shift here is a considerable drop of the proportion of the workforce employed on a full-time, permanent basis, from 44% in 2022 to just 28% in 2026. The number of workers on freelance contracts, registered as sole trader or self-employed has risen from 40% in 2022, to 46% in 2026. The percentage of the workforce that is not currently working has more than doubled among respondents to this survey, 8% of workers in 2026, in comparison to just 3% four years ago. These shifts reflect the context of a challenging production landscape, where production slowdown has precipitated a decline in job security, permanent roles and a rise in those out of work (BECTU, 2025).

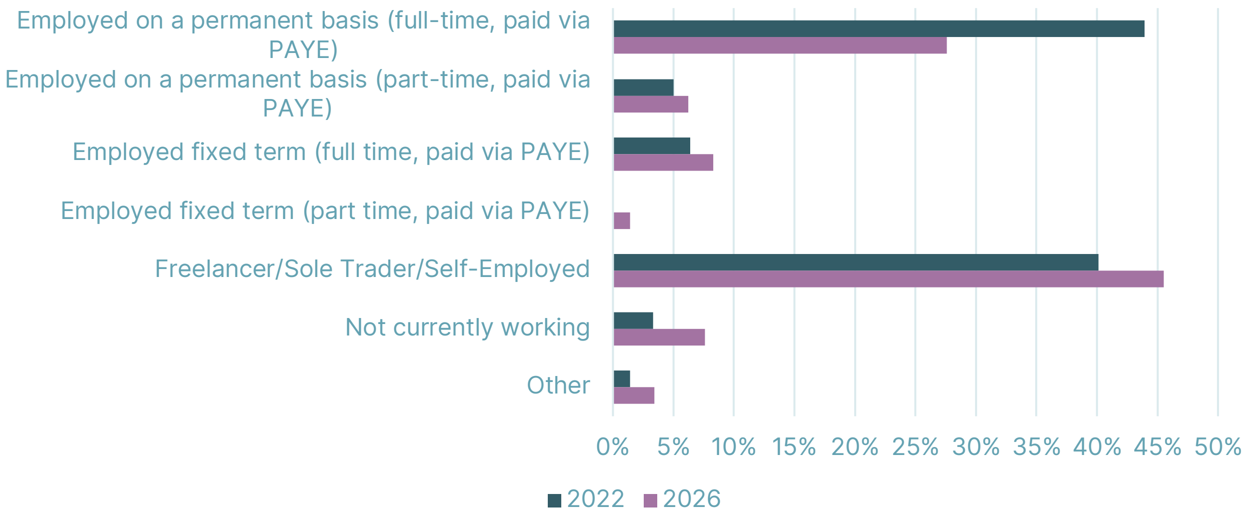

Figure 16: Screen sector workforce by employment type, 2022 & 2026.

b. Methods of Recruitment

Respondents were asked to identify their preferred methods in sourcing information about job opportunities, in both 2022 and 2026. We observe a big jump in 'word of mouth' as a primary source of information gathering in the 2026 results (86% selected it in 2026, compared to 27% in 2022), and the inclusion of 'Sheer luck' in the top five. The use of social media, ranked third in 2022, drops out of the top five for these new results, as does the use of online databases. There appears to be an intensification around informal networks, and an increasing reliance on reputation and credits in lieu of publicly available information via online portals and social media channels.

	2022	2026
1	Contacts and networking	Word of mouth
2	Word of mouth	Reputation/previous credits
3	Social media (Facebook, WhatsApp, LinkedIn etc)	Contacts and networking
4	Reputation/previous credits	Personal recommendations
5	Online databases	Sheer luck

Figure 17: Top five recruitment methods, 2022 & 2026

c. Barriers to Sector Entry & Progression

Respondents were asked to select any barriers they had encountered in either gaining entry to the screen sector, or progressing once they had started work. The 5 most prevalent codes for the 2026 cohort are shown in Figure 18 below, alongside the most cited barriers from 2022. In the current context of production slowdown, and a challenging labour market, we see a marked rise in employment uncertainty in the 2026 cohort, a challenge not even identified in the 2022 top five. Such concerns are mirrored by an intensification of concerns around financial challenges, either related to pay rates, or other methods of funding.

Elsewhere, we see a persistence in a lack of knowledge around progression opportunities. While this concern was cited considerably less frequently in the 2026 data, it raises questions alongside the data on recruitment practices (Methods of Recruitment) of the sector reverting to previous bad habits, and underscores the need to ensure career progression routes are fair, transparent and accessible for all.

	2022	2026
1	A lack of knowledge about progression opportunities	Employment uncertainty
2	Discrimination (Sexism, Racism, Ageism etc.)	A lack of knowledge about progression opportunities
3	Geographic factors	A lack of networks/networking events & contacts
4	Finding and accessing entry-level positions	Financial issues, related to pay or securing funding
5	Financial issues, related to pay or securing funding	Any barriers related to geographic location
=		Toxic work environments (Bullying, harassment etc.)

Figure 18: Barriers to sector entry and progression, 2022 & 2026. Top 5 most frequently cited (coded) responses

d. Welsh Language Productions

Just over half (53%) of the 2026 cohort have worked on some Welsh language content since January 2023, presenting a mobile, fluent sector that is comfortable working bilingually. With only 8% working entirely in the medium of Welsh, the 'all-Welsh' proportion of the workforce has dropped, in relation to 2022, alongside those who do not work on any productions in the Welsh language. The response rate from Welsh speakers was considerably lower in the 2026 survey, in comparison to previous iteration, and so we cannot take this shift as entirely free of bias and therefore indicative of a definitive drop in Welsh language productions. However, what we observe in this data is consistent with what we see elsewhere in this survey; a smaller overall workforce engaging in work over fewer productions.

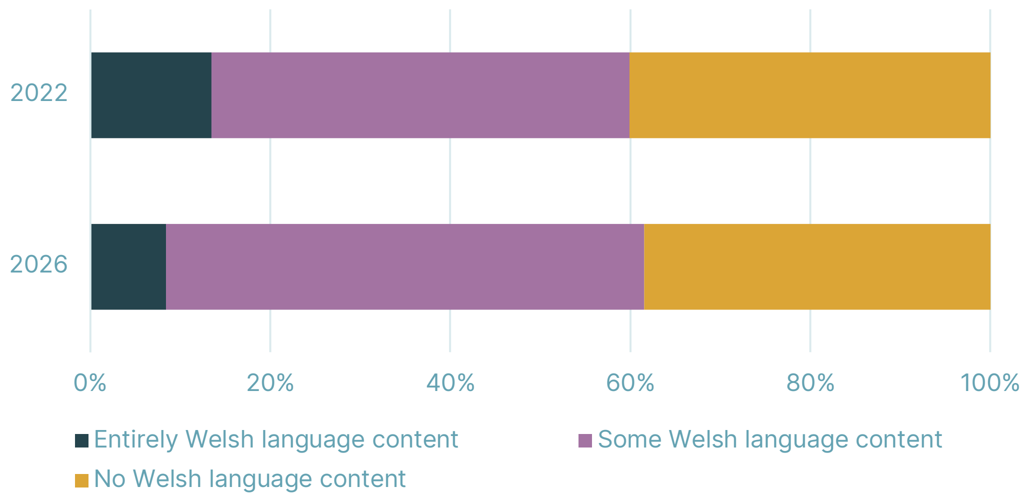

Figure 19: Screen sector workforce engagement in Welsh language productions, 2022 & 2026

The data presented here in relation to employment and recruitment practices reflect a challenging production landscape and some worrying trends, namely a decline in permanent job roles, a rise in unemployment and greater dependence on freelance work. Additionally, recruitment practices show an increased reliance on informal networks, personal contacts and word of mouth to source job opportunities, that runs the risk of undoing what progress has been made in terms of more diverse and open recruitment and employment, and the shrinking of the sector around a 'closed core.' The following section considers a variety of factors related to skills and training for the sector.

6. Skills & Training

Skills and training provision for the screen sector has been the primary aim of the University of South Wales's Media Cymru team. Since 2023, the team has delivered 22 training courses, supporting over 300 individual members of the screen sector workforce (See Appendix 1). Additionally, 24 individual freelancers have received bespoke support to engage in training via the Freelancer Development Fund. As noted in the Methodology section, while this survey was distributed to respondents of the original Wales Screen Workforce Survey, as well as to those who have participated in USW's Media Cymru training programme, it was not exclusively shared with these groups. This section provides feedback on training take up, persistent barriers to accessing training, as well an understanding of the impact training has had on those who have engaged with it. It also considers future training priorities, and the nature of training in the context of more general career progression and workforce development.

a. Training Engagement

Figure 20 shows responses to whether the workforce had undertaken any training since January 2023. to this, alongside the results from 2022, when respondents were asked if they had undertaken any training since April 2021[14]. There is a considerable rise in the level of training undertaken (58% in 2026 vs. 29% in 2022). Respondents were also asked what form the training took, in terms of face-to-face, online or hybrid delivery. 50% of the 2026 cohort took part in face-to-face training, compared to 31% in 2022. Similarly, 24% of 2026 respondents took part in training with a hybrid component, in comparison to 58% in 2022, reflecting a post-pandemic shift back towards in-person engagement.

Have you undertaken any training or have been a recipient of mentoring in the previous 18 months?

	2022	2026
Yes	29%	58%
No	71%	42%

Figure 20: Training engagement, 2022 & 2026

b. Barriers to Accessing Training

In both the 2022 and 2026 surveys, the whole cohort (not just those who had *not* undertaken any training) were asked to identify any barriers that had been encountered, in terms of accessing or taking part in training courses. The top five results of both 2022 and 2026 can be seen in Figure 21. While 'The cost of training'

[14] Data collection for the 2022 survey began in November 2022, and concluded at the end of January 2023. Data collection for the 2026 survey ran from January – March 2026.

has overtaken 'A lack of knowledge of what training is available' as the highest-ranking barrier to access for 2026, we see evidence of a persistence of barriers including cost, training location, and complex application processes, suggesting long-standing issues endure between cohorts.

For the 2026 survey, respondents selected the potential barriers from a list, and were allowed to select multiple options. 63% of respondents selected more than one barrier. These results offer an indication of how multiple barriers can intersect and stack – the cost associated with the training itself may be exacerbated by the cost of travel to Cardiff from other parts of Wales, for example – resulting in accessing training becoming nearly impossible. With this in mind, and observing the shift back to predominantly in-person engagement mentioned in Training Engagement above, the potential access that hybridised training may provide for those more geographically removed from the main clustering in Cardiff should not be ignored.

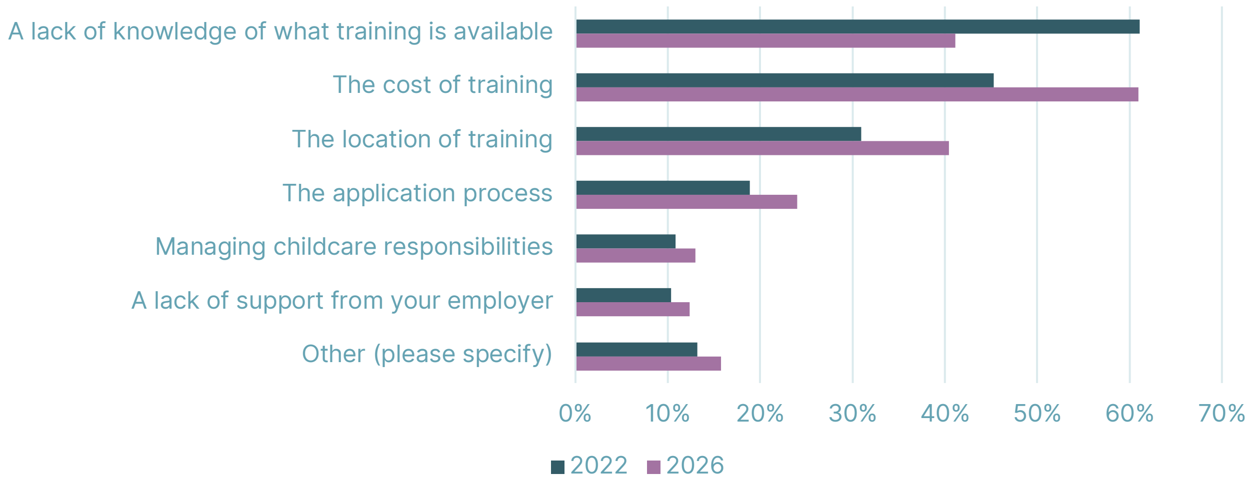

Figure 21: Barriers to accessing training and mentoring, 2022 & 2026

c. Training Support

Since January 2023, respondents indicated that they were predominantly undertaking free training opportunities (49%), or looking to get that training cost paid for by a third party. Few paid for training themselves (17%), and employers' support of training is very low (22%). As noted in the Methodology, while we must acknowledge the potential for our sample to be biased, only 24% of respondents listed Media Cymru supported training, and many others highlighted courses from national providers such as NFTS Wales, ScreenSkills, PACT and BECTU/CULT Cymru.

d. Training Impact

A major benefit of being able to run a second workforce survey at the conclusion of a project with the duration of Media Cymru, is an opportunity to investigate the longer-term impact that undertaking training has had on the workforce. To that end, respondents to the 2026 survey were asked to describe what impact, if any, the training they have undertaken[15] has had. For clarification, this question is in reference to **all** training, not just the provision provided by USW and partners as part of Media Cymru. A coded classification of the most popular responses can be seen in Figure 22 below.

Perhaps unsurprisingly, the most common impact associated with having undertaken training is the accruing of new skills, and general upskilling. Beyond that, respondents associated training with a chance at career progression, a general sense of greater confidence, strengthening professional networks and, in several cases, directly linked in successfully obtaining work. While training provision has the potential to equip the workforce with vital new skills, it also provides opportunities to strengthen professional networks, and contribute towards promotions and career progression and development.

It is worth noting here that the most common response to the question on training impact was coded to be 'None.' At first glance, this presents a negative picture of the impact of training, and while there were certainly respondents for whom the training had not met their expectations, many other responses that expressed a more positive sentiment of 'not yet', optimistic that the training they'd undertaken could still provide benefits, and acknowledging that gauging impact is not always a quick process. The authors feel it would be disingenuous to not acknowledge this element of the responses, and to not address wider concerns and shortcomings regarding training for the screen industries, some of which we address in our conclusions and recommendations of this report.

	Training Impact
1	Improved/updated skills
2	General career progression
3	Increase in confidence
4	Strengthened professional networks
5	Led to promotion

Figure 22: Training Impact, most popular responses (Coded).

[15] As above, this refers to any training undertaken since January 2023.

e. Attitudes to Career Progression

In addition to specifically addressing the challenges and barriers to successful career progression within the screen sector workforce, respondents we asked to show their attitudes, more generally towards career progression, in terms of skills, access to training, employer support, and current capacity to engage in training activity. The results of the 2026 responses are shown alongside 2022 in the tables below (Figure 23). While results relating to one's ability to perform their current role, having access to relevant training or mentoring opportunities and being able achieve a work/life balance remain largely unchanged, there is an observable shift in the perception of employer support for career development: 41% of respondents in 2026 either agree or strongly agree that their employer supports their career development needs, in comparison to 56% in 2022.

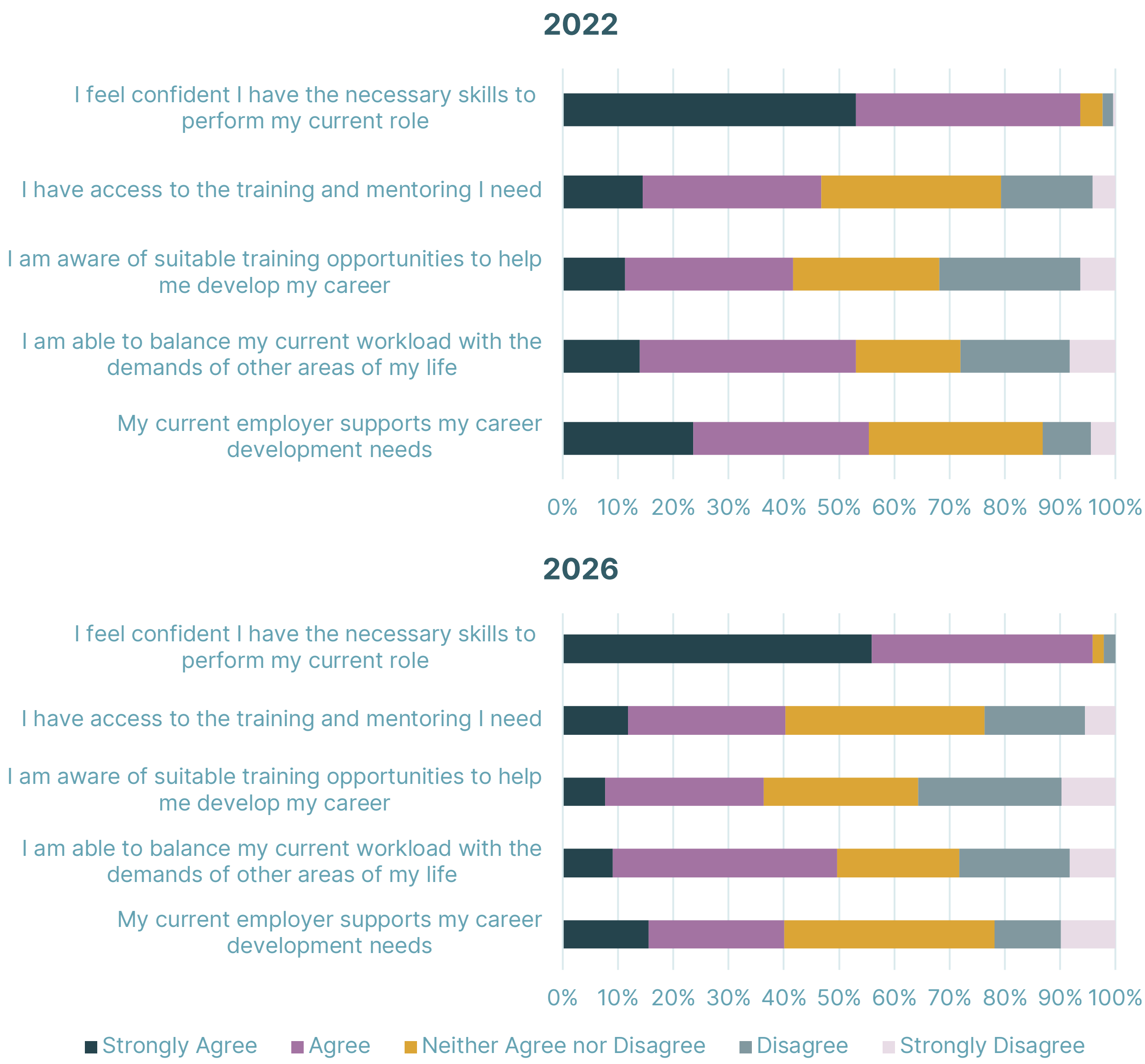

Figure 23: Attitudes to career progression, 2022 (above) and 2026 (below).

f. Cost-of-living crisis

With high levels of job insecurity, production slowdown and high training costs cited as a key barrier, it is important to better understand how the current economic climate is affecting the screen sector workforce in Wales more generally. To that end, respondents were asked how they had been affected by the cost-of-living crisis. The three most common themes, as a result of the authors' coding pass on the data, are presented in Figure 24 below, and followed by some representative anecdotal responses, presented anonymously:

	How have you been impacted by the cost-of-living crisis?
1	Rising price of essential costs such as groceries and fuel
2	Financial difficulties related to paying a mortgage, rent, or saving for house
3	Financial pressures intensified by a scarcity of work

Figure 24: Cost-of-living crisis impact, 2026. Most frequent responses (Coded).

"We're having to increase our budgets for regular costs such as groceries, utility bills and so on. As a household, our rates haven't increased to match this so we're able to save less for unexpected expenditure, emergencies, to tie us over when work is scarce or anything like holidays."

"Massively impacted by the cost-of-living crisis. [...] I miss meals regularly and have struggled to provide basic clothing needs and care for my health mental and physical welfare. The only time I eat well is now on set, and those meals are also now harder to come by."

"The current increasing costs of food, fuel and bills means that we are less able to save. Savings are often vital in this industry to allow for quieter periods or the ability to leave a job."

"I live paycheque to paycheque on my current temporary admin job, and frequently dip into savings I have set aside to try and buy a home - regularly budgeting my food shop and fuel bills, cancelling much previously enjoyed sports memberships to save money"

"Rise in costs of bills, food, mortgage and with the lack of advertised work across the UK in the creative sector has led to mental health stresses."

"Having to forego unpaid career opportunities (which would be beneficial in building networks) to ensure I can pay daily living costs. Struggling financially and as primarily self-employed there is no support available for me via Universal Credit - considering leaving industry, having negative impact on mental health."

The quotes above make for stark reading, and are representative of the majority of responses to this question. While general narratives around creative industry growth and prosperity often dominate the national conversation, it is vital to remember the very real impact that a volatile production landscape can have, and on the freelance workforce that often bear the brunt of that impact.

g. Future Training Priorities

Finally, with regards to skills and training, respondents were asked to identify what they felt were priorities, with regards to skills and training over the next two years. The top five results from both 2022 and 2026 are presented in Figure 25, below. We see a greater emphasis on training related to new technologies, including AI, reflecting the rapid changes over the past few years (Davies, 2020; Carey, Giles and Hay, 2026) both in the creative industries and across the economy. Elsewhere, priorities remain around better leadership training, business acumen (including bid writing and growth); reflecting the high levels of micro-businesses and individual freelancers operating in the sector. Training relating very specifically to the current job role also reflects the highly delineated and hierarchical role structures that exist in TV and film production environments, where the vast majority of this cohort state that they work.

When we allow for differences in the 2026 cohort between those identifying as male and female, we do see a difference between the priorities of the two groups. While the main priorities – role specific training and training in disruptive new technologies (especially AI) – remain consistent between male and female responses, we do see more females highlighting 'People Management and Leadership' (37% female vs. 30% male) as a priority, as well as a desire for more industry experience (27% of male respondents selected this option). Additionally, 32% of female respondents selected 'Work-Based Culture Training (Mental Health, Well-being, EDI)', in comparison to just 17% of males.

	Male	Female
1	Training related to new technologies (e.g. AI, Virtual Production, etc)	Training specific to your current job role
2	Training specific to your current job role	Training related to new technologies (e.g. AI, Virtual Production, etc)
3	General Business Acumen (Business Growth, Distribution, Grant applications, Funding)	People Management and Leadership
4	Software-specific training (e.g. Unreal Engine, Adobe, Blender, Final Cut etc.)	Software-specific training (e.g. Unreal Engine, Adobe, Blender, Final Cut etc.)
5	People Management and Leadership	General Industry Experience

Figure 25: Future training priorities, Male (left) and Female (right), 2026

7. Innovation

A key objective of the Media Cymru project has been to develop the capacity and understanding of the concepts of Research & Development (R&D) and Innovation within the creative industries in South-East Wales. The definition of innovation adopted by the UK government is based on the OECD's definition in the Oslo Manual (OECD, 2018), defining 'innovation' as:

"a new or improved product or process (or combination thereof) that differs significantly from the unit's previous products or processes and that has been made available to potential users (product) or brought into use by the unit (process)"[16]

While previous work in Wales to develop this innovation capacity (particularly CICP Clwstwr) has paved the way for Media Cymru, the concepts remain under-utilised, misunderstood, or interpreted as different terminology within the creative industries resulting in challenges implementing innovative workflows that have been imported wholesale from other industries and sectors (OECD, 2015; Lewis, 2025). With this in mind, our survey was keen to gather attitudes from the perspective of the workforce, particularly with regards to the ability to participate in innovation and R&D activity, how that activity is understood, and what capacity may yet be untapped within the screen sector workforce in Wales. Respondents were instructed to 'select all that apply' from the statements, in each case.

a. Capacity for Innovation

Given the nature of creative work, it is perhaps unsurprising that responses tend to trend towards the 'process' definition of innovation, rather than that of 'product':

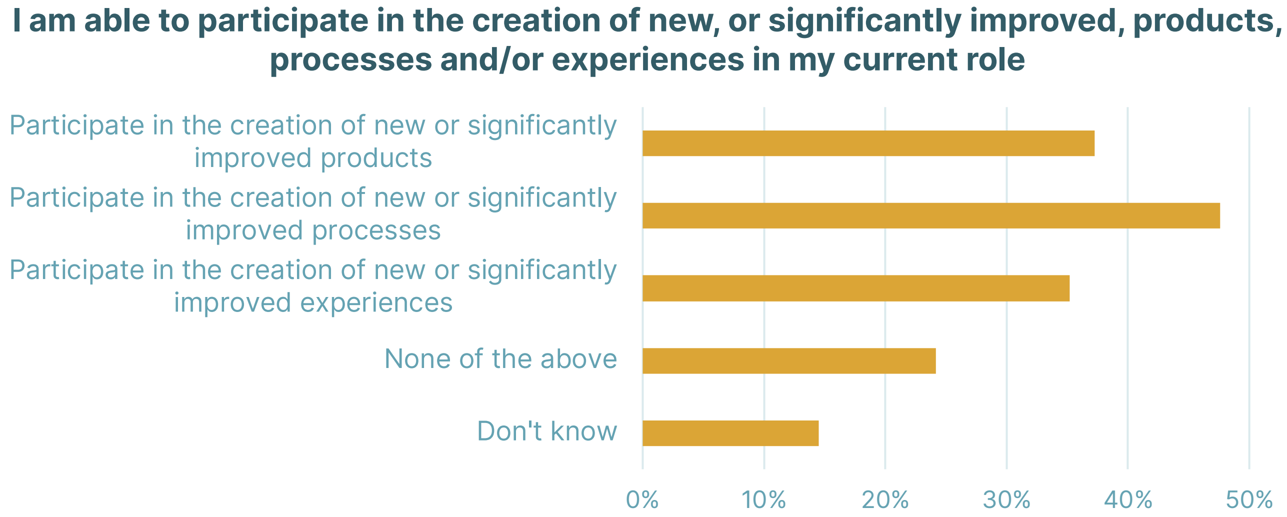

Figure 26: Participation in innovation

[16] OECD, 2018. p.20.

I am aware of opportunities to create new or significantly improved products, processes and/or experiences in my current role

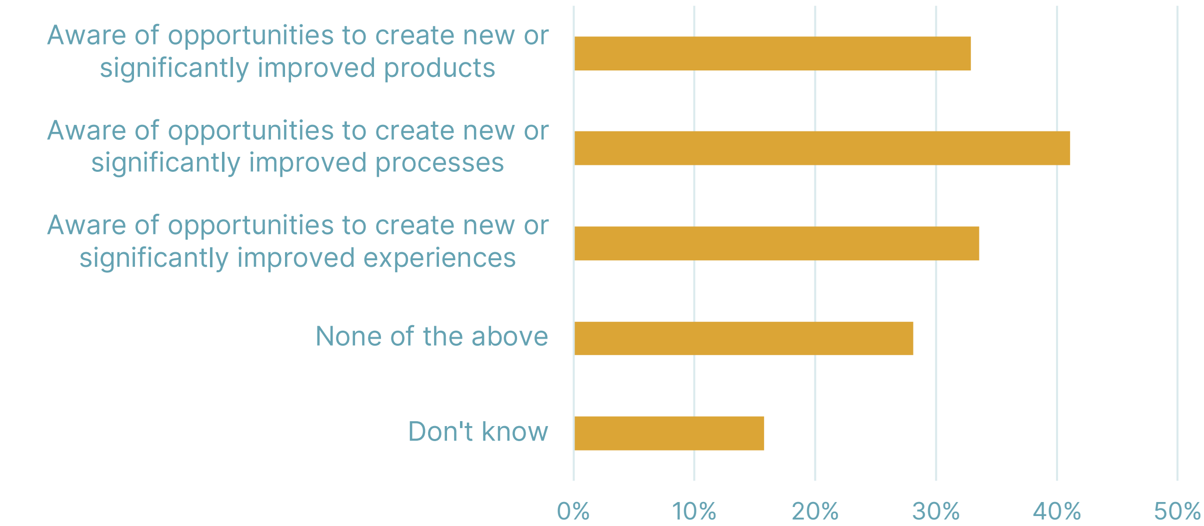

Figure 27: Awareness of opportunities for innovation

I am clear on the skills I need to create new or significantly improved products, processes and/or experiences in my current role

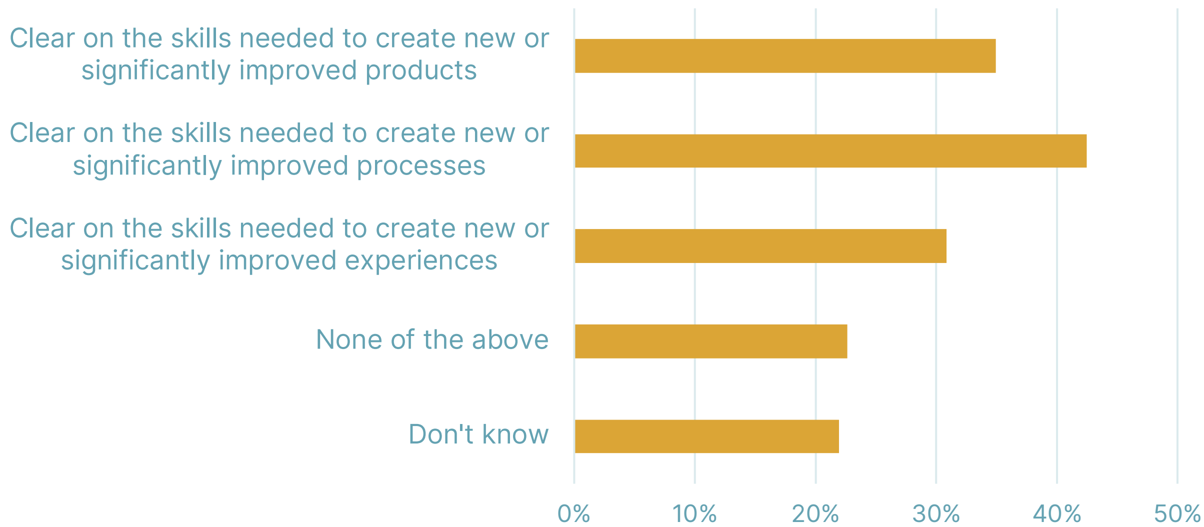

Figure 28: Skills required for innovation

I am confident I have the skills necessary to create new, or significantly improved, products, processes and/or experiences in my current role.

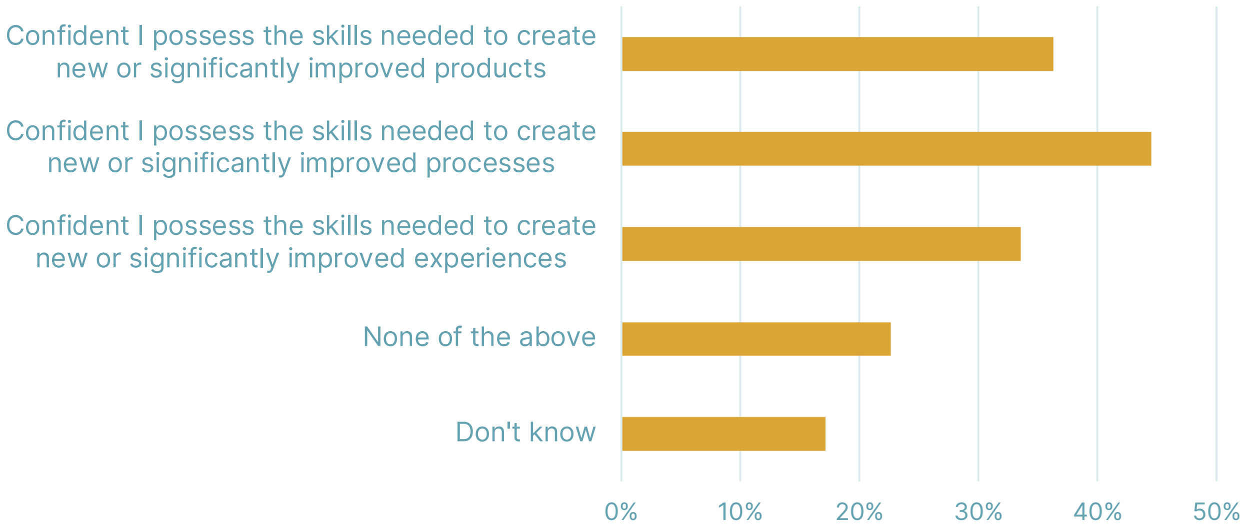

Figure 29: Confidence in skills to innovate

b. Participation in Innovation Activity

An interesting pattern occurs when we consider who, among the respondents in 2026, believe they have the skills necessary to innovate, but are currently not engaged in any R&D or innovation activity at their place of work. 63% of respondents believe they have the skills to innovate now. However, more than half (53%) are currently not involved in any innovation or R&D activity. A key element of developing innovation capacity at cluster or city-region level is absorptive capacity (Cohen and Levinthal, 1989; Leiponen, 2005; Davies, Jones and Hurford, 2025), these results suggest that the workforce in South Wales now has excess absorptive capacity for R&D and innovation activity that is currently untapped.

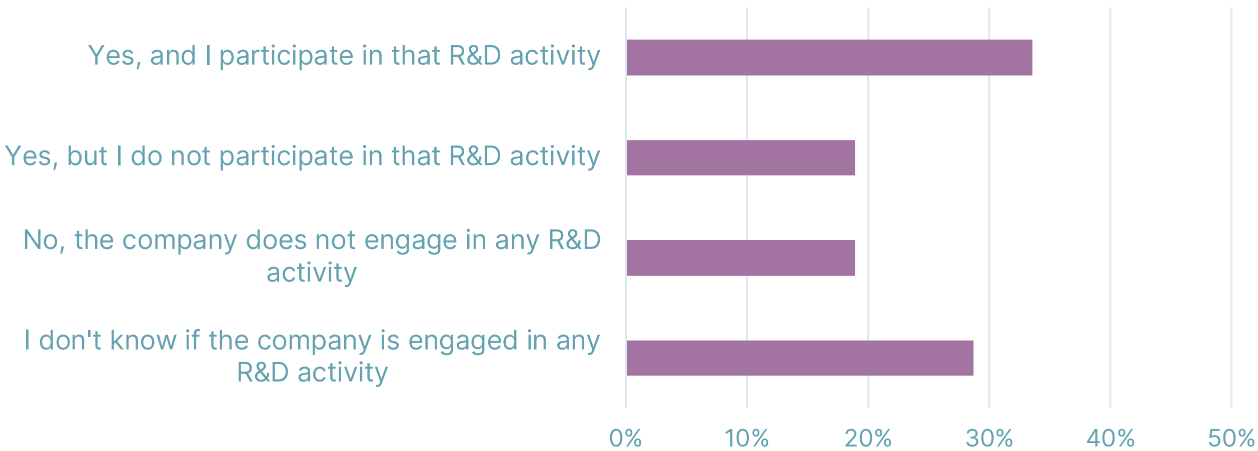

Figure 30: The company in which I mainly work is involved in R&D activity

c. Opportunities for Innovation

Building the previous section, the 2026 survey respondents were also asked to identify the most common opportunity areas for innovation. The responses can be grouped into three main themes. Most referenced were the potential application and impact of a variety of **new technologies to the production process**. Emerging AI tools were specifically highlighted, as might be expected, but responses also referred to game engines (e.g. Unreal, Unity), virtual production techniques as well as other, more general references to new technologies.

"AI, how to best use it without negating the need for creatives to do what they are best at - being creative. Audiences - what formats are the future, how to bring in audiences and get them to pay for products implementing new immersive technologies."

"Immersive tech can be used in the creative sector, e.g. filming using virtual production techniques and photorealistic game engines such as Unreal Engine [or] using VR tech to produce immersive storytelling headsets."

The second category of potential areas for innovation can be characterised as **innovation in business models**, novel approaches that provide opportunities for further growth. These included greater funding opportunities for innovative projects, people-centred approaches, innovations in recruitment practices, and opportunities for the sector to be less risk averse, and scale up activity more efficiently.

"The television industry as I know it is changing rapidly with the emphasis shifting hugely to digital. The way people get/want their content has changed and we need to move with it."

"In our sector, many of the methods we use are outmoded and technically outdated, and the tech that is available is not always fit for purpose. Equally the processes used are often stuck in a status quo rather than adapting to new knowledge and understanding."

Thirdly, a wider variety of opportunities were identified in terms of **shifting workforce culture and working practices** to be more fair, inclusive, sustainable and ethical in their approaches. Such responses highlighted opportunities to work more sustainably, innovation as a means to increase the inclusivity of the sector (linked to recruitment practices, above), as well as innovations addressing well-being, working hours, toxic or deleterious working practices and accessibility.

"Sustainability is another key area, with greener production methods and low-carbon workflows becoming both a responsibility and an opportunity for leadership."

"There are many new opportunities to create a more inclusive and happier work/life balance within the screen sector, and to do it in a way which is more socially and environmentally responsible. However it means everyone taking responsibility and working more collaboratively."

It is important to acknowledge the frequency with which it was suggested the framework for innovation opportunities could be improved. More than anything above, responses were quick to identify the barriers to being able access innovation opportunities.

"Very few. Budget constraints are making life impossible already."

"Currently opportunities generally are highly limited due to funding restrictions, let alone for innovation."

"Very few...just surviving financially is what many people's minds."

These focussed heavily on budgetary and financial restrictions, but also referenced a lack of understanding of what innovation is defined to be, as well as additional difficulties for those in junior positions, or working as freelancers. Participation in Innovation Activity above, shows evidence of the growing capacity to participate in innovative and R&D capacity in the South Wales region. The workforce is increasingly equipped with the skills and know-how, with regards to innovation and R&D, but they currently are not engaging with that activity as much as they could. They now need more opportunities to be able to participate in R&D and innovation, and ensure that capacity does not go to waste.

8. Changing Working Culture

A major part of developing innovative ways of working within the screen sector in Wales involves a consideration around shifting entrenched elements of working culture that prevent, inhibit or limit greater equality, accessibility and sustainability of work, and the workforce that supports it. The Creative PEC's Good Work Review (Carey, Giles and O'Brien, 2023) provides a huge amount of data on this at national level. Additionally, these considerations also align with the 'Fair' pillar of Media Cymru's overarching mission. Improving workplace culture is not just a moral and ethical imperative, it is also crucial to continued growth and health of the sector, as poor mental health, working environments and toxic behaviour leads to burnout, higher attrition rates and a loss of vital talent from the workforce.

To that end, USW's Media Cymru Skills and Training portfolio has included several programmes aimed at tackling areas that related to working culture. In 2023, the university also hosted a 'Culture Change Conference', aimed at sparking conversations around workplace culture change, and subsequent events – 'Accessible Futures' and 'Family Futures' – delving deeper into aspects of changing workplace culture and working practices. The following section provides results in relation to the theme Culture Change, namely around attitudes to workplace accessibility, well-being, and thinking of leaving the sector.

a. Workplace Accessibility

Respondents were asked to provide their attitudes towards the accessibility of their workplace. Results appear generally positive, with the majority of responses expressing positive, or neutral, sentiment to the statements in each case.

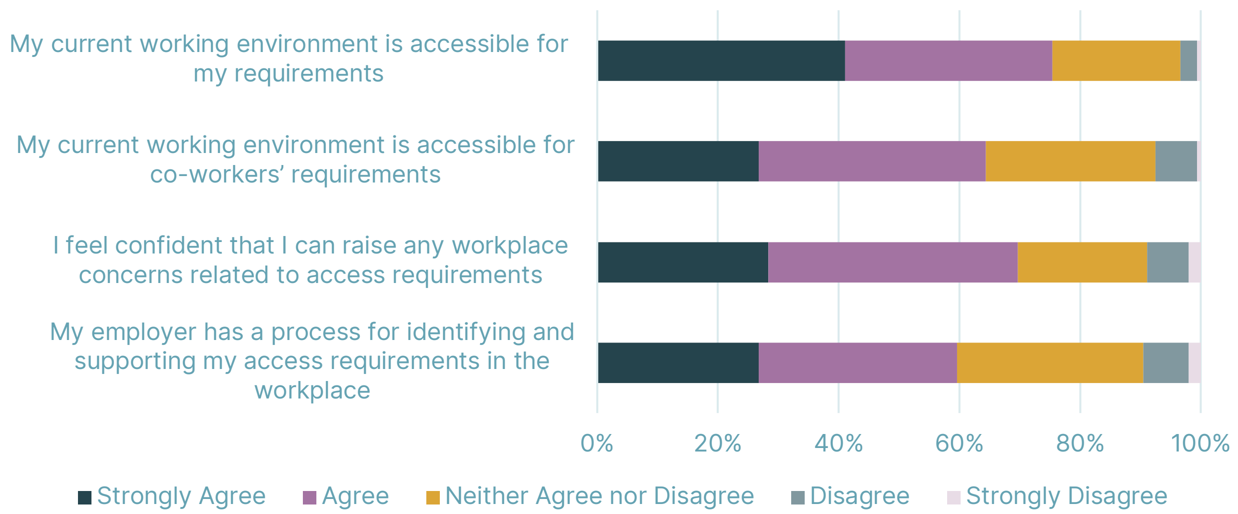

Figure 31: Attitudes towards workplace accessibility, 2026

Respondents were not asked explicitly about workplace accessibility in the 2022 survey, and so a comparison between cohorts is not possible. In addition, any further responses with regards to accessibility in the workplace were sought via text responses. A selection of those responses is provided below. Respondents offered a variety of perspectives on workplace accessibility. There was an acknowledgement of an improvement in terms of provision for those with access requirements:

"I've seen an improvement over the last few years. In recent roles there has been a dedicated access coordinator which has really helped, and I've attended interview where you are presented with the questions beforehand which has improved the recruitment process. Flexibility in roles stills needs to be addressed."

Though the sentiment also exists that more is still required, particularly in terms of recruitment practices and general inclusivity:

'While my own experience has been positive, there is still room for improvement across the industry in terms of accessibility - particularly around transparent recruitment processes, clearer entry pathways, and widening access beyond informal networks. Ongoing efforts to embed inclusive practices and reach underrepresented communities would further strengthen accessibility across the sector.'

The intersection of a freelance job market (such as TV and film) and a variety of access needs can be especially challenging. Freelancers don't have the same protection as employees, and the nature of pre-production can result in certain crew hiring often happening after other key decisions, that could impact access and well-being, have been made:

"[...] fear of speaking up keeps people quiet. Culture from the top-down needs to change, as well as freelances and staff. If you break down barriers, such as recruitment where everyone has to fight each other for work, and become more inclusive, then people will be able speak freely."

A final note on accessibility within workplaces is to highlight that, while rhetoric around issues, and the implementation of frameworks and structures have the potential to move the conversation forward, there are no guarantees that such process will be adhered to:

"My workplace has a process for identifying access needs, but these are often ignored or not actioned."

b. Wellbeing & the Working Environment

Respondents were also asked around their attitudes towards a variety of factors related to their working environment, including inclusivity, their personal well-being, mental and physical health, and the ability to challenge and report any inappropriate workplace behaviour. Results can be seen in the figures below, alongside comparison with the 2022 cohort, who were asked the same questions.

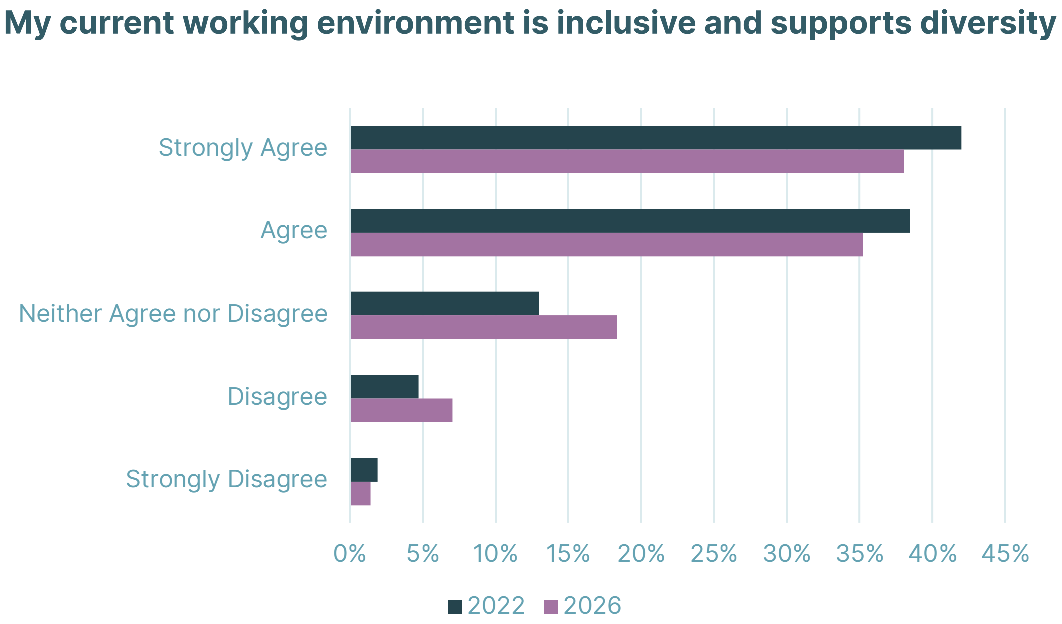

Figure 32: Workplace inclusivity, 2022 & 2026

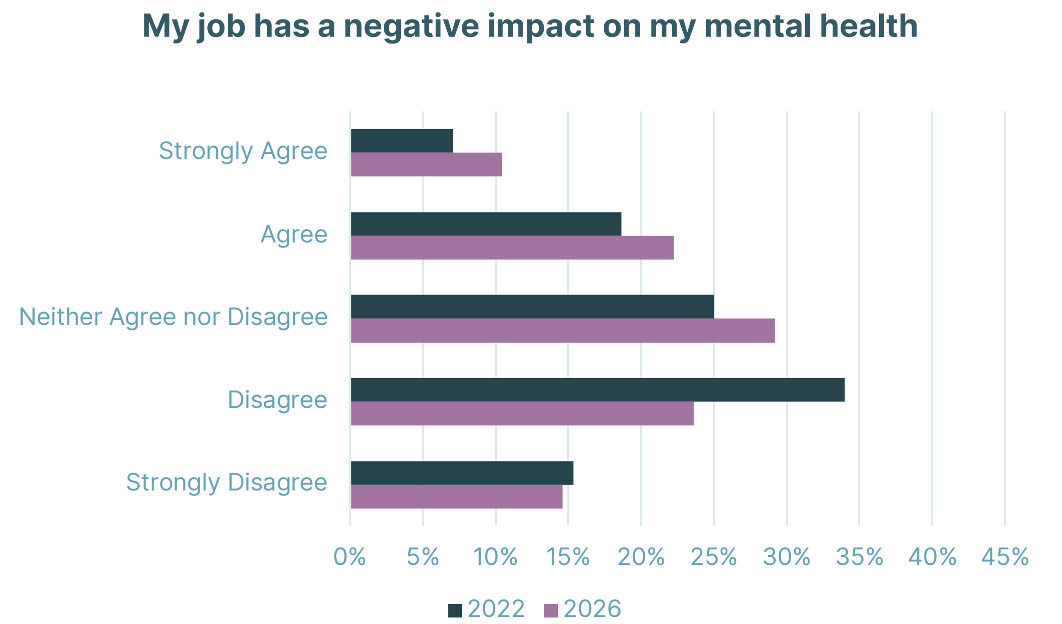

Figure 33: Job impact on mental health, 2022 & 2026

We see a decline, in comparing the two cohorts, in terms of sentiment. The 2026 respondents, in general, express more negative sentiment towards their workplace's inclusivity, feel their jobs have a more negative impact on both their mental and physical health, and feel less confident in being able to raise any workplace concerns, and challenge inappropriate behaviour.

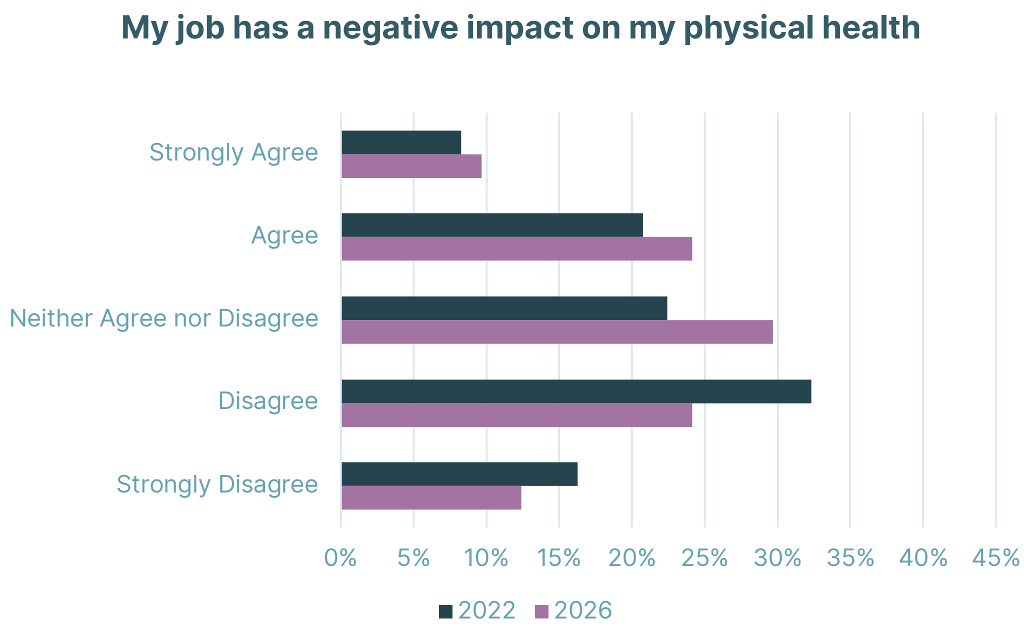

Figure 34: Job impact on physical health, 2022 & 2026

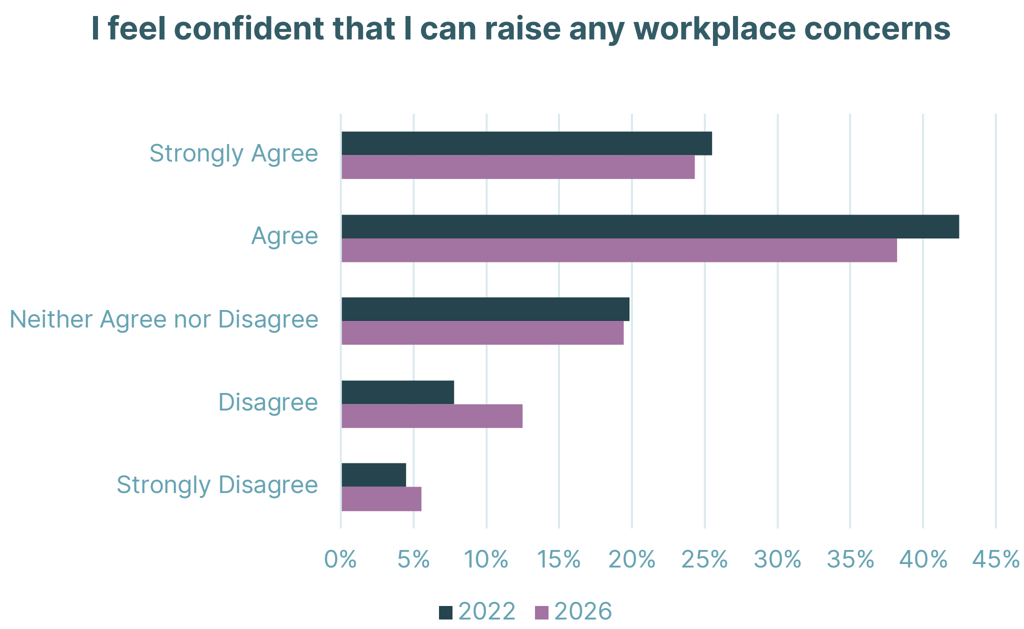

Figure 35: Ability to raise workplace concerns, 2022 & 2026.

In the same manner as Workplace Accessibility above, respondents were asked to provide any further comment with regards to their well-being and the workplace. Responses highlight the deleterious impact of the cyclical nature of tv and film production cycles, placing unnecessary pressure during both periods of activity and lull:

“The 'feast and famine' cycle of working on productions seems detrimental to the health and well-being of all crew members. During the 'feast' phase, it requires crew to give up anything else during the week due to long filming hours (e.g. regular exercise, socialising, restful activities etc). It requires exceptional budgeting skills, resilience and the hope of nepotism during the 'famine' phase. Flitting between the two and readjusting life is unsustainable.”

Or in the case of the account below, intense frustration at the mental and physical toll incurred as production budgets shrink, workloads increase and pay rates do not cover the rising cost-of-living:

“I found myself [...] four times in a situation that was mentally damaging this year, two of those times it was also physically so. I knew that if I said anything, it wouldn’t make a difference. [...] Why am I killing myself, bleeding my best years out for a production company who have agreed to make a show for less than they know it will cost, and that cost will be burdened onto the crew. The crew who have less people in their team, less hours and less resources. Productions who blatantly do not care about their crews, [...] Why am I still doing this job? Is this the most damaging abusive relationship? I have given so much to my work and gifted my twenty years of experience to many managers with less, to receive barely enough to pay my gas bill in return.”

Both here, and with regards to accessibility, common qualitative responses came from freelancers, expressing that they felt such questions did not apply to them, as they were freelance and not employees. This trend is concerning, and production companies and studios should take steps to ensure the freelance elements of their workforce feel integrated, involved and able to access the same support during shoot that the employee workforce have access too. This need is particularly acute, given the increase in freelance workforce and decline in salaried employees we observe in this survey.

c. Leaving the Screen Sector

As in 2022, respondents were asked if they had ever considered leaving the screen sector. Even during the 'boom' period of 2022/23 more than half (52%) admitted to considering leaving, and so it is unsurprising, given the currently difficult production landscape that the figure is even higher for 2026. 68% of respondents are thinking about leaving the sector (Figure 36). When the main reasons for considering leaving are factored in, we see a predominance of short and longer-term job insecurity, and concerns around wider industry direction informing responses in 2026, though more persistent issues related to long working hours, stress and a poor work/life balance endure, underscoring the need for a continued focus on improving workplace culture.

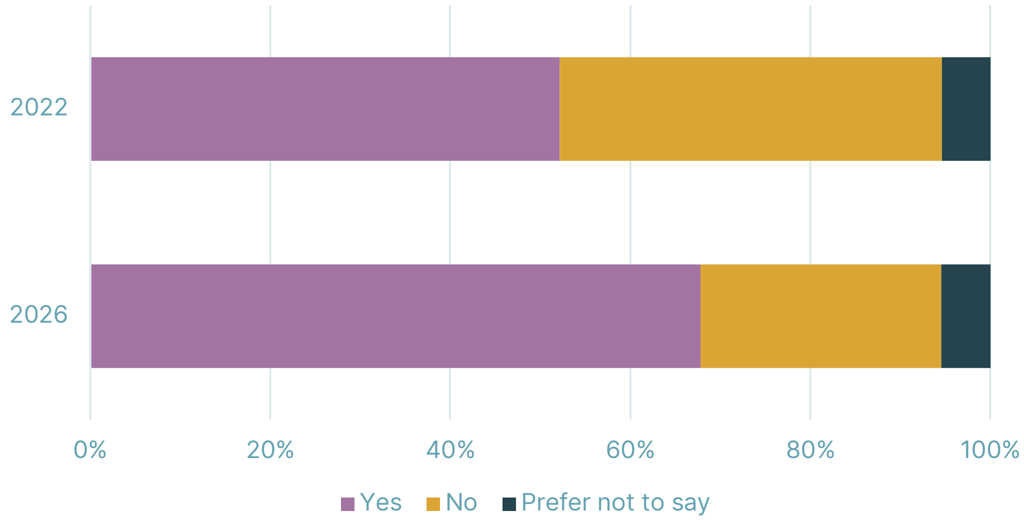

Figure 36: 'Have you ever considered leaving the screen sector?' 2022 (top) & 2026 (bottom)

Additionally, respondents were asked to select the main reasons prompting them to consider leaving (Figure 37), and if they've decided to continue in the screen sector, why they've chosen to do so (Figure 38).

We present the most common responses in both 2022 and 2026 below[17]. We see a considerable shift in the reasons for considering leaving the sector in 2026, focussed more on concerns around job insecurity, and wider industry direction, though persistent issues concerning work/life balance, long working hours and stress continue. Reasons for staying in the sector have also changed, with 2026's responses being more focused on proficiency in one's role, with less of a focus on competitive rates of pay. Passion for the work, and the opportunity to be creative and work with creative people are consistently important factors in convincing the workforce to continue.

[17] 2022's responses were coded from open text responses, 2026 were selected from a list of options based on those codes

	2022	2026
1	Stress or poor mental health	Short-term and longer-term job insecurity
2	Long working hours	Concerns about the wider industry direction & trends
3	Short-term and longer-term job insecurity	Poor work-life balance
4	Poor work-life balance	Long working hours
5	Toxic workplace culture (inc. discrimination and bullying)	Stress or poor mental health

Figure 37: Reasons for considering leaving the screen sector, 2022 & 2026

	2022	2026
1	Being passionate about my job	I'm good at my job
2	Working conditions/working culture changed and improved	I love my job
3	Competitive rates of pay	I don't know how to do anything else
4	A perception of being unable to do anything else	I am able to be creative in my current role
5	The opportunity to be creative	I feel my skillset is specialised and non-transferable

Figure 38: Reasons for staying in the sector, 2022 & 2026

9. Sustainability

One of the four key pillars of Media Cymru is 'Green.' The project has funded multiple R&D projects aimed at providing greener production solutions, and to incorporate climate conscious storytelling into film and TV being made in Wales. Such efforts align closely with policy priorities in Wales, at national legislative level by the Well-being of Future Generations (Wales) Act (2015), and at industry level by the Screen New Deal Transformation Plan for Wales (BFI, albert, Arup, 2023). At USW, our training has also focused heavily on issues related to more environmentally sustainable and responsible production environment for film and TV, especially the two cohorts of Sustainability Coordinators (Davies and Hurford, 2025) trained in 2024 and 2025. The following section considers results related to this theme, both in terms responsibilities and decision-making directly related to environmentally sustainable practice, as well as tangential factors, such as transport and mobility.

a. Environmental Responsibility

Screen sector workers were asked whether they had any responsibilities associated with environmentally sustainable practice (Figure 39). While it is encouraging to see around a quarter of respondents being asked to work in a more sustainable way, over a third either being asked, or taking responsibility for carbon accounting and reporting, we still see almost half (49%) or respondents having no environmentally sustainable responsibilities associated with the roles at all suggests more needs to be done to embed these practices as business as usual.

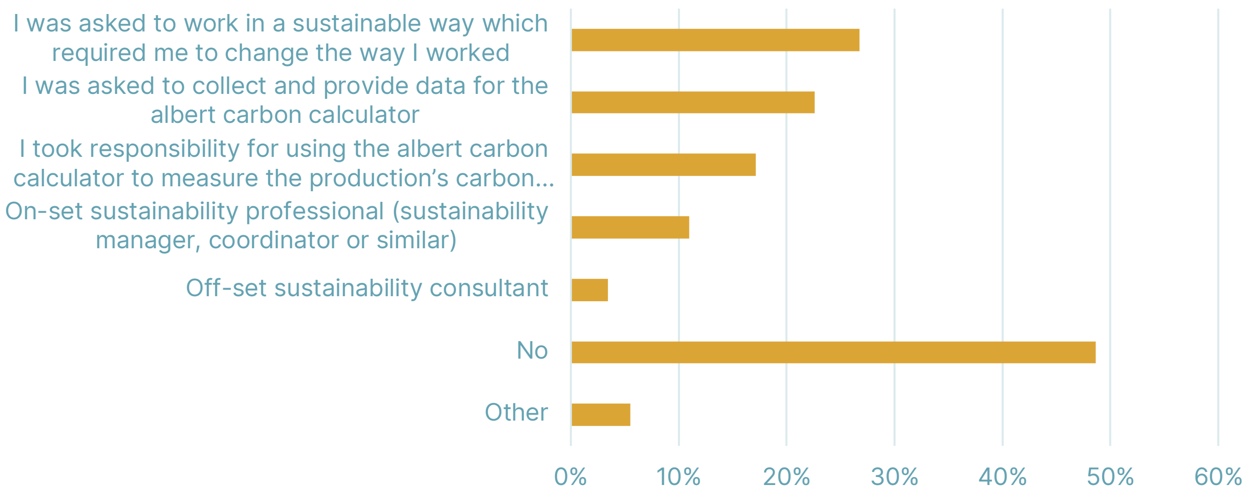

Figure 39: 'Since January 2023, have you had any responsibilities associated with environmental sustainability in your roles?' 2026 cohort

b. Transport

In film and TV, transport emissions are one of the largest contributors to a production's carbon footprint (BFI, albert, Arup, 2021). Respondents were asked both their main methods of transport for travelling to work (Figure 40), and any alternatives they may also use (Figure 41). We see Internal Combustion Engine (ICE) cars as the most popular form of transport, with Electric Vehicles (EVs) and walking sharing the second place. A comparison with national level statistics from Wales in 2024[18] shows that, based on this cohort, the screen sector has a considerably lower level of car usage (66% combined, vs. 79% car usage for the general Wales population) than across all industries. Alternative methods of transport are led by train travel, though ICE cars are also well-represented here.

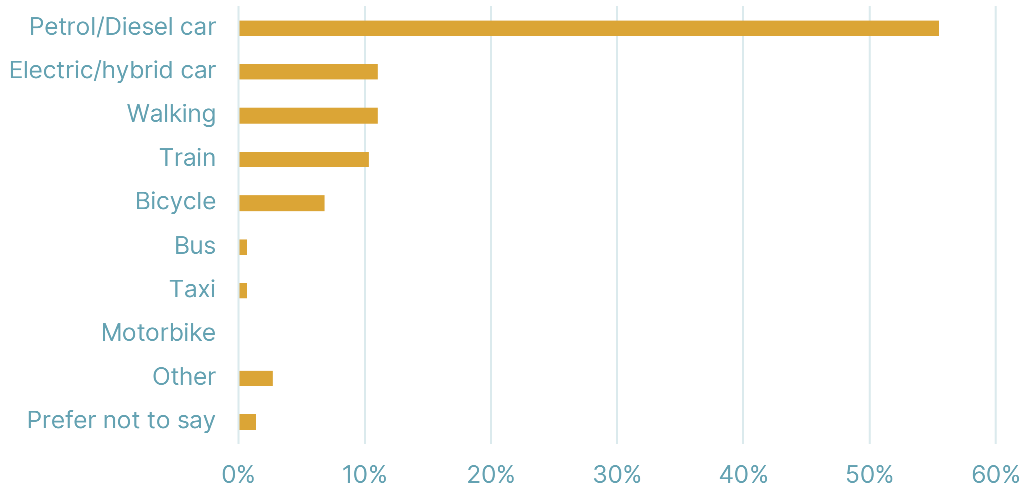

Figure 40: Main mode of transport, travelling to work. 2026

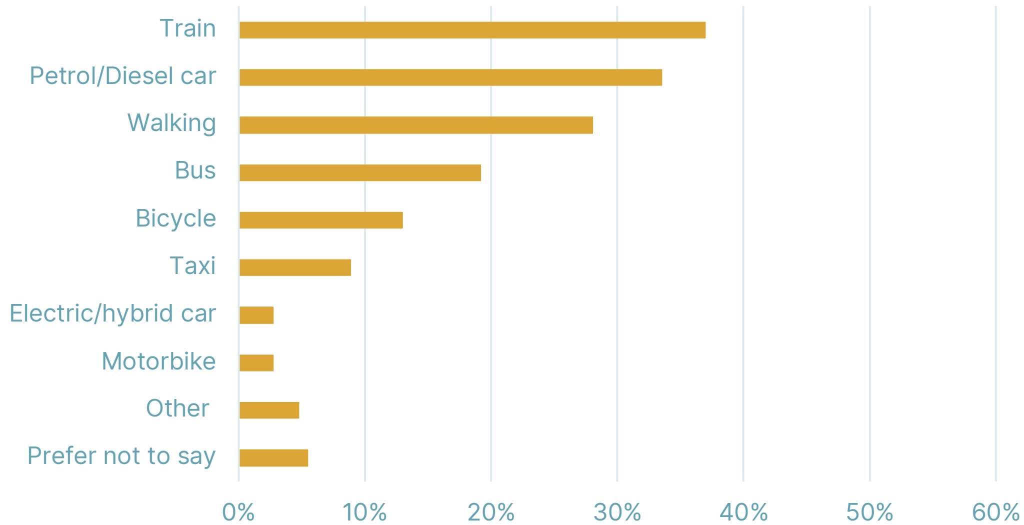

Figure 41: Other modes of transport, travelling to work. 2026

[18] https://www.gov.uk/government/statistics/transport-statistics-great-britain-2025/transport-statistics-great-britain-2024-domestic-travel

c. Travel & Decision-making

In addition, respondents were asked if considerations around environmental sustainability ever have an impact on their transport decision-making or travel arrangements (Figure 42). 46% said that such considerations ‘often’ or ‘always’ factor into their decision-making. Less than a quarter (23%) said that such considerations never play any part in their decisions.

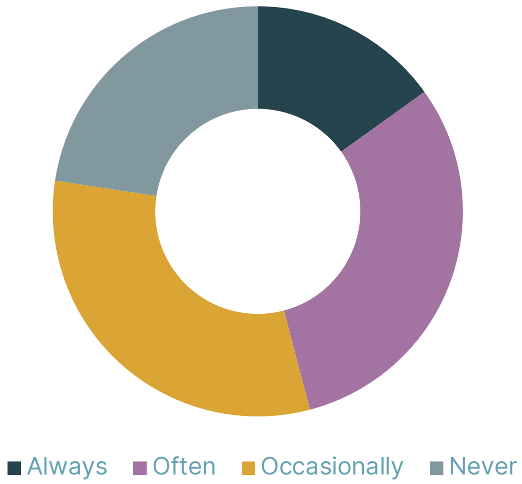

Figure 42: 'Do considerations around environmental sustainability ever have an impact on your transport arrangements?' 2026.

The results in this section offer some encouraging trends in terms of the embedding, and capacity for further growth, of environmentally sustainable practice in screen sector, particularly in film and TV production. Car usage is below the national average for commuting, despite many areas of television production (locations, as well as studio sites) not well served by public transport infrastructure, and inaccessible by bicycle or foot. There appears to be an awareness, and appetite, from many within the sector to make decisions, where feasible, to lower their carbon footprint, and there is evidence of a greater degree of environmentally sustainable action taking place on set. That said, more can, and must urgently be done to embed, normalise and structure a more holistic degree of carbon reduction, accurate reporting and environmentally and financially sustainable budgeting decisions.

Conclusions

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This 2026 iteration of the Wales Screen Workforce Survey has sought to provide an up-to-date, practical and illuminating picture of the screen industries workforce in Wales. As the Media Cymru project draws to a close at the end of 2026, it is salient to consider the current health of the workforce, the priorities and concerns of those who make up the workforce, and offer guidance and direction on effective methods of supporting screen work in Wales beyond the scope of the project. To do this, we have structured this concluding section around three key themes; sector demographics, skills, training and innovation, and post-project legacy.

a. Sector Demographics

While, in many ways, the needle does not seem to have moved a great deal, we observe some key demographic shifts, with potential implications in the medium to longer term. The sector's gender balance remains around 50/50, the workforce remains largely dominated by those from white backgrounds, and remain in line with the national Welsh population, though numbers of those from non-white backgrounds have grown slightly. Representation of those who consider themselves to have a disability, impairment or long-term mental or physical health condition has increased considerably since 2022, and is much closer to the Wales national population. Those from LGBQ+ groups are also well-represented, more so than in 2022, and considerably higher than the national population. The backgrounds of those working in the sector remain university educated, higher than average earners from affluent socio-economic backgrounds.

What we do see, however, is a shift in terms of age and seniority. The age distribution of the 2026 sample has trended toward older workers, bringing with them more experience, more seniority, established networks and contact lists. Younger workers and entry-level positions appear to have declined considerably since 2022, and the post-covid 'boom years.' While an argument can be made that the sector became oversaturated with new entrants during that time, a lack of new entrants also poses challenges for the longer-term health of the sector.

Additionally, the patterns emerging in 2026 risk the regression to bad habits around recruitment, employment and career progression, undermining of the progress in working culture that the industry has made over the last few years. We see evidence of this happening in terms of fewer job opportunities, and an increase of those on freelance employment contracts, with a greater reliance on closed professional networks and contact lists, sourcing work through word of mouth, rather than more publicly accessible online databases and forums. If this trend continues, new entrants will find it increasingly difficult to breach these networks.

The production landscape in the last two years has been extremely challenging. Work has become harder to find, and the sector has shrunk in comparison to its 2023 level, at the height of the production boom. This is reflected starkly in our results, job insecurity, over the short and longer term, is the most prevalent reason for considering leaving the industry, more people are considering leaving than in 2022. More people report as being out of work, at the time of data collection, and fewer workers are employed on permanent contracts. Furthermore, qualitative responses around challenges related to the general economic landscape, particularly the cost-of-living crisis, paint a bleak picture.

b. Skills, Training and Innovation

We see far higher numbers of the workforce having engaged in training and mentoring, in comparison to 2022. Media Cymru, and the portfolio of work delivered by USW and partners, is a sizeable part of this, but many other training providers, including NFTS Cymru, BECTU/Cult Cymru and Screenskills, feature prominently in responses. What we can state, with confidence, is considerably more training has been delivered, and engagement rates are much higher than in 2022. Additionally, training priorities have remained largely consistent across the course of the project, and USW's Media Cymru training portfolio has delivered courses across many of those key areas, including Virtual Production, AI for workflow management, software (Blender, Unity), leadership, distribution and format development. A full evaluation of the USW x Media Cymru training programmes will be delivered in a separate, upcoming report.

Those designing screen sector training provision should refer to these results, and look to engineer mechanisms that overcome common, persistent challenges related to cost, location and visibility. Barriers to training remain for many, most notably cost and time. Future training must acknowledge the context in which it exists, and the wider industry structure should explore mechanisms through which the workforce can be supported, and enabled, to access relevant training and continue to develop. Additionally, the further emphasis placed on the cost of training as a barrier to access, coupled with low reported levels of employer funding for training, reflect wider challenges in the production landscape. Training providers, and those funding training, would do well to explore strategies to offer support where possible, especially for those on freelance contracts and facing intensely uncertain short-term job security.

With the cost associated with training courses identified as a major barrier to gaining access to opportunities (both in the 2022 and 2026 results), it is salient to consider where projects such as Media Cymru impact the regional skills landscape throughout their duration. All of the training provided by USW through Media Cymru and the external collaborators, was provided free of charge to participants, and in some cases included paid placements and bursaries. Without that Media Cymru investment, those training courses would have inherited that cost at the point of sale. With the legacy of Media Cymru in mind as we move towards the end of 2026, future training provision, and providers, should factor in the impact the removal of this kind of investment will have on the workforce's capacity and ability to take part in training.

Another key area of Media Cymru's mission was the development of R&D and Innovation capacity. Results from 2026 seem to indicate a workforce far more confident in their ability to participate in R&D and innovation activity, and eager for more opportunities to engage. It feels reasonable to argue that there has been considerable growth in the regional absorptive capacity in South Wales, and steps should be taken to ensure the momentum and capacity built in the last four years is not allowed to wane.

c. Media Cymru, Legacy and Policy Implications

As a final point, it is important to consider the scale of investment, in terms of incubation, scale-up, training and support, that has been injected into the screen sector in South Wales since 2022. Across that same period, the global landscape of production – and indeed all of society – has shifted drastically. 2026 is a very different context to 2022, the post-pandemic burst of growth has been replaced by a far more precarious and challenging production environment. Two key elements make themselves apparent from the 2026 survey's dataset.

Firstly, continued growth and prosperity is not guaranteed. The workforce is struggling, in many ways, and a greater degree of support, in terms of recruitment practices, training, financial support and workplace culture improvements is required to ensure the sector avoids catastrophic attrition rates. Secondly, through various large projects, the South Wales screen sector has been the beneficiary of close to a decade of investment and support, and that support ends in December 2026 with no direct replacement to ensure the legacy of the growth and development that has been put into motion.

At multiple points in this report, we have referred to the rapidly changing and challenging production environment for screen production, and its effects on the Welsh workforce are clearly apparent in our findings. This shifting landscape exists within a wider context – in Wales, the UK and internationally – of rapid technological change, political shifts, and impacts upon a wide variety of stakeholders. The workforce is represented by reports such as this one, whereas the Creative PEC's skills audits in 2026 demonstrate employers across the creative industries harbour ambitions for further growth, and realise the vision of the Creative Industries Sector Plan (HMG, 2025), but are stymied by outdated skills systems (Carey, Giles and Hay, 2026). The creative industries are vital part of the UK's Industrial Strategy, and also a priority sector for Welsh Government. With a new Senedd, and a drastically different political landscape in Wales, it is vital that policymakers and stakeholders understand not only the financial, social and cultural contribution the creative industries have made to Wales, but also the very real need to put mechanisms in place to ensure that its potential is fully realised and supported into the future.

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11. Appendix 1

Media Cymru Training Courses Summary

Date	Training Course	Partners	Attendees	Description
Jan 2024	Virtual Production Essentials	Final Pixel Academy	17	5-day workshop, virtual production for short-form/commercial programming.
Jan 2024	Global Formats	Grand Scheme Media, S4C	33	1½-day workshop, commercial and unscripted formats for international markets.
Feb-May 2024	Inclusion Accelerator	Gritty Talent, Channel 4, BBC Cymru	20	12-week business-building diversity development programme, for screen sector SMEs.
Mar 2024	Moho 2D Animation	Bigger House Productions	8	Two-week intensive animation software course, with chance to work on a commissioned short film.
Apr-May 2024	Reset Programme	From Another	12	6-week online programme for working parents, looking to overcome barriers to employment.
Apr-May 2024	Sustainability Coordinators for Screen 2024	Severn Screen, Earth to Action, Welsh Government, Ymddiried	6	8-week classroom course, and 10-15-week production placements for six fully trained Sustainability Coordinators for Film and HETV.
Jun-Jul 2024	Data Management Fundamentals	Gorilla Academy	21	Half-day programme developing data management skills for a wide variety of screen roles.
Jul 2024	How to be a Greenlancer	Picture Zero	34	3-hour workshop, freelancer focussed environmentally sustainable practice.
Oct 2024	Accessibility & Inclusion Workshops	TV Access Project	14	5 sessions building the foundations for better and more inclusive workplaces.
Jan 2025	Dogfen Feature Documentaries	The Truth Department	12	2-day documentary development workshop.
Feb 2025	Unity Games Development Upskilling	Cloth Cat Academy	6	2-week Unity (game engine) training course.
Mar 2025	Ascend: DDN Acting Workshop for Soaps	BBC Studios & Spotlight	10	Soap acting workshop for Deaf, Disabled and Neurodivergent actors from Wales.
Jun 2025	Film Distribution for Wales	Film Distribution Association, Ffilm Cymru Wales & Film Hub Wales	2	Two 9-month traineeships for the development of Wales-based film distribution positions.
May 2025	Unscripted Digital Format Development	S4C	49	1-day workshop, exploring the production of digital shows for multiple platforms.

Jul-Aug 2025	Blender for VFX	Gorilla Academy	8	Two-week training course in Blender, an essential CG, animation and VFX tool.
Sep 2025-Apr 2026	Virtual Production Fellowship Wales	Final Pixel Academy, FiveFold Studios and Gorilla Academy	20	9-month training course in core virtual production competencies.
Sep – Dec 2025	Sustainability Coordinators 2025	Earth to Action, Severn Screen, Creative Wales	6	A second cohort of the sustainability coordinator training.
Jan – Mar 2026	Leadership Fast Track: Managing People and Self	Lisa Balderson	12	Online training course designed to provide tools to develop safe and inclusive teams.
Apr – May 2026	Deaf Awareness and British Sign Language for the Welsh Screen Sector	Deaf Friendly	24	BSL basics for use in the screen sector and production environments.
Jun 2026	Practical AI for the Workplace: Helping organisations reduce administration, improve workflows, and work more effectively	Stable	20	Training programme exploring applications of AI to improve workflows, and administrative benefits, away from creative applications.
Oct/Nov 2026	Vertical Storytelling	Screen Alliance Wales	TBC	Introduction and writers' workshop for emerging short-from content.

12. Appendix 2

Question Changes from WSWS 2022

Question	2022	2026 Changes/Comments
How old are you?	• Under 21 • 21-25 • 26-30 • 31-40 • 41-50 • 51-60 • 61+ • Prefer not to say	Reprofiled categories, included Under 18, 18-20 categories that were not present in 2022
How would you describe your gender identity?	Text box	Changed question format from 2022 (open text). New format includes options (Male, Female, Non-binary), and an option to self-describe
Is your gender the same as was assigned to you at birth?	N/A	New question: • Prefer not to say • Yes • No
What are your caring responsibilities?	• Parent (dependent child) • Parent (non-dependent child) • Carer • Both • No • Prefer not to say	Reprofiled question to offer more detail in choice, and gave the option to select multiple answers
Can you understand, speak, read, or write Welsh?	• Fluent speaker • Intermediate speaker • New speaker (learner) • No • Prefer not to say	Adapted categories to align with UK Government harmonised standard
What is your race or ethnicity? Please choose one option that best describes your ethnic group or background:	• Black/African/Caribbean/ Black Welsh or British • East Asian/East Asian Welsh or British • South Asian/South Asian Welsh or British • Arab/Arab Welsh or British • White and Asian • White and Black African or Caribbean • Any other multiple ethnic background • Any other single ethnic background • White Welsh, Scottish, English, Northern Irish or British	Adapted categories to align with UK Government harmonised standard

	• White Gypsy or Irish Traveller • White Irish • Other White background • Prefer to self-describe • Prefer not to say	
Do you have a disability, impairment, or long-term physical or mental health condition?	• Yes • No • Prefer not to say	Added supplementary question (below)
If you are comfortable in doing so, how would you define your disability?	N/A	New Question: • Prefer not to say • Vision (blindness or partial sight) • Hearing (deafness or partial hearing) • Mobility (walking short distances or climbing stairs) • Dexterity (lifting and carrying objects, using a keyboard) • Learning or understanding or concentrating • Memory • Mental health • Stamina or breathing or fatigue • Socially or behaviourally (associated with autism spectrum disorder (ASD), • Asperger's, ADHD) • None of the above • Prefer to self-describe
What is your highest level of education attained?	Open Text	Changed question format from open text box to select one option, in the interest of survey duration
Is your annual total household income* above or below average (including benefits and excluding deductions)?	N/A	New question: • Prefer not to say • Higher than average • Around average • Below average • Not applicable
When you were aged about 14, what was the occupation of the main or highest income earner?	N/A	New question: • Prefer not to say • Professional occupations • Managers (senior, middle, or junior) • Clerical and intermediate occupations • Routine, semi-routine manual or service occupations • Technical and craft occupations • I don't know
How have you been impacted by the cost-of-living crisis?	N/A	New question: Open Text
How often do you work in that location?	N/A	New question: • Prefer not to say • Every day

		• 2/3 times a week • Once a week • Once a month • Once every 3 months • Once a year • Other (please specify)
Are you able to drive?	N/A	New question, supplemented by the following two
What is your main mode of transportation for traveling to work?	N/A	New question: • Prefer not to say • Petrol/Diesel car • Electric/hybrid car • Motorbike • Bus • Train • Taxi • Bicycle • Walking • Other (please specify)
What other modes of transportation do you use for traveling to work?	N/A	New question: • Prefer not to say • Petrol/Diesel car • Electric/hybrid car • Motorbike • Bus • Train • Taxi • Bicycle • Walking • Other (please specify)
Have any of the following issues related to travel ever impacted your work in the screen sector?	• Yes • No • Prefer not to say Prefer not to say. If you selected Yes, please specify:	Reprofiled question based on coding generated from responses in original survey
Do considerations around environmental sustainability ever have an impact on your transport arrangements?	N/A	New question: • Always • Often • Occasionally • Never
Please select your employment status.	• Employed full-time • Employed fixed term • Employed part-time • Freelancer/ Sole Trader/ Self-Employed • Not currently working • Other • If you selected 'Other', please specify:	Added more detail

What level of seniority best describes your current, or most recent, role?	N/A	New question: • Don't know • Founder/Owner • Senior/Lead/Department Head • Mid • Junior • Not Applicable
How long have you been in your current role?	Open text	Reformatted into select an option question
In your experience, what has/have been the most effective way(s) of sourcing jobs and opportunities in the screen sector?	Open text	Reprofiled question based on coding generated from responses in original survey
Since January 2023, have you had any responsibilities associated with environmental sustainability in your roles?	N/A	New question: Please select all that apply: • I was asked to work in a sustainable way which required me to change the way I worked • I was asked to collect and provide data for the albert carbon calculator • I took responsibility for using the albert carbon calculator to measure the production's carbon footprint • On-set sustainability professional (sustainability manager, coordinator or similar) • Off-set sustainability consultant • No • Other (please specify)
I am able to participate in the creation of new, or significantly improved, products, processes and/or experiences in my current role.	N/A	New question: Please select all that apply: • Participate in the creation of new or significantly improved products • Participate in the creation of new or significantly improved processes • Participate in the creation of new or significantly improved experiences • None of the above • Don't know
I am aware of opportunities to create new or significantly improved products, processes and/or experiences in my current role	N/A	New question: Please select all that apply: • Aware of opportunities to create new or significantly improved products • Aware of opportunities to create new or significantly improved processes • Aware of opportunities to create new or significantly improved experiences • None of the above

		• Don't know
I am clear on the skills I need to create new or significantly improved products, processes and/or experiences in my current role	N/A	New question: Please select all that apply: • Clear on the skills needed to create new or significantly improved products • Clear on the skills needed to create new or significantly improved processes • Clear on the skills needed to create new or significantly improved experiences • None of the above • Don't know
I am confident I have the skills necessary to create new, or significantly improved, products, processes and/or experiences in my current role	N/A	New question: Please select all that apply: • Confident I possess the skills needed to create new or significantly improved products • Confident I possess the skills needed to create new or significantly improved processes • Confident I possess the skills needed to create new or significantly improved experiences • None of the above • Don't know
The company in which I mainly work is involved in R&D activity	N/A	New question: • Yes, and I participate in that R&D activity • Yes, but I do not participate in that R&D activity • No, the company does not engage in any R&D activity • I don't know if the company is engaged in any R&D activity
Based on your understanding of innovation, what opportunities are there for innovation in your sector?	N/A	New question: Open text
Do you think you have the skills needed to innovate?	N/A	New question: • Yes • No • Don't know
What training or mentoring have you undertaken, and who delivered the training?	What training or mentoring have you undertaken? (Open text)	Added in the request for additional detail re: training providers
How has the training or mentoring been paid for?	• Free • Paid for by me • Paid for by employer • Other	Added in specific option for Media Cymru, as well as option to identify other funders

What impact has the training you have undertaken had on your career progression?	N/A	New question: Open text
Looking ahead to the next two years, what skills or training needs do you envisage being key to your career progression?	Open text	Reprofiled question based on coding generated from responses in original survey
If you have any further comments related to your employment and well-being, please include them in the box below	N/A	New question: Open text
My current working environment is accessible for my requirements	N/A	New question: • Strongly Agree • Agree • Neither Agree nor Disagree • Disagree • Strongly Disagree
My current working environment is accessible for co-workers' requirements	N/A	New question: • Strongly Agree • Agree • Neither Agree nor Disagree • Disagree • Strongly Disagree
I feel confident that I can raise any workplace concerns related to access requirements	N/A	New question: • Strongly Agree • Agree • Neither Agree nor Disagree • Disagree • Strongly Disagree
My employer has a process for identifying and supporting my access requirements in the workplace	N/A	New question: • Strongly Agree • Agree • Neither Agree nor Disagree • Disagree • Strongly Disagree
If you have any further comments related to the accessibility of your workplace, please include them in the box below	N/A	New question: Open text
What barriers have you encountered when either joining or trying to progress in the screen industry?	Open text	Reprofiled question based on coding generated from responses in original survey
If you have considered leaving the sector, have any of the following contributed?	Open text	Reprofiled question based on coding generated from responses in original survey
If you have decided to stay in the industry, what influenced that decision?	Open text	Reprofiled question based on coding generated from responses in original survey

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Dr James Davies is a Research Fellow at the University of South Wales, as part of Media Cymru. He has written extensively about the creative and cultural industries, focusing on freelance careers in UK television, career entryways, training needs and skills gaps. He has also examined the characteristics of creative clusters, and place-based cultural and creative policymaking in South Wales and the West Midlands. As part of his work focussed on freelancers in Media Cymru, James has introduced the Freelancer Development Fund, to support screen sector freelancers in accessing training relevant to their careers.

Richard Hurford is the Research and Innovation Lead for Creative Industries at the University of South Wales, and Skill and Training project lead for Media Cymru, researching skills gaps and screen/media industry needs, and commissioning bespoke training interventions. He has been deeply involved in video games higher education for the last 20 years and with research interest in video games and creative industries sector development in Wales.

The Centre for the Study of Media and Culture in Small Nations at University of South Wales delivers high-quality collaborative research and innovation on the creative industries in Wales through the frame of small nations globally. It is based in the Faculty of Business and Creative Industries. The Centre has strong UK and international partnerships with research universities and creative industries organisations delivering a range of multidisciplinary grant-funded projects.

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