

# **SUCCESS, SECURITY AND SUPPORT**

What Cultural Freelancers  
in Wales Need

**Jenny Mathiasson**

**Cultural Freelancers Wales  
2023 Survey Report**

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# Key findings

Following on from our 2020 and 2021 research this report looks at how freelancers in Wales are doing now: they have weathered a pandemic, Brexit, and an ongoing cost of living crisis.

We found that:

- Most cultural freelancers are likely to live in South Wales (a fifth of respondents lived in Cardiff) where opportunities are more frequent
- 60% of cultural freelance work was commissioned or otherwise took place in Wales itself and increasing that number was highly desired
- Most cultural freelancers were in the 35-64 age bracket and had considerable experience in the sector (10+ years)
- 23% of cultural freelancers identified as disabled, d/Deaf, and/or neurodivergent
- Twice as many freelancers were learning Welsh compared to 2020 and 60% spoke some level of Welsh
- One in four freelancers still do not know whether they will stay or leave the industry and half had seen a downturn in the amount of work they could get
- 71% of freelancers feel unsupported in the culture sector and many called for more understanding and empathy from organisations and clients
- Half of all freelancers would not be able to pay three months' expenses using their savings, highlighting the financial precarity in the sector
- Brexit has left freelancers with fewer opportunities, less money, and more hassle

Those in most need of support are freelancers:

- Working in music or performing arts
- Identifying as disabled, d/Deaf, and/or neurodivergent
- From working class backgrounds

- In rural locations
- From the Global Majority
- Who are getting older

Highlighting these needs gives organisations, funding bodies, and fellow freelancers an idea of what is required for freelancers to feel more supported and capable of continuing working in the cultural sector.

We hope this report will inform policy and decision making in the Welsh culture sector going forward.

Without change we are at severe risk of losing our freelance workforce, but together we can create a stronger, kinder, and more equitable industry for all.

# Introduction

## About the study

Following in the footsteps of our much needed 2020 report ([‘Rebalancing and Reimagining’](#)) and its 2021 follow-up ([‘Road to Recovery?’](#)) we once again set out to survey the landscape of cultural freelancers in Wales. Our aim was to find out more about the demographics of our freelancers and to explore experiences and perspectives of their profession in 2023. The following pages summaries the responses from the Freelance Check-In survey. It provides a snap-shot of the workforce, its resilience, and its concerns.

Cultural Freelancers Wales (CFW) is a diverse collective of cultural freelancers in Wales, strengthening the freelance voice and offering inclusive support to fellow freelancers. CFW is fully bilingual and operates across Wales. Running since April 2020 (formerly as Wales Freelance Taskforce), CFW has been supported by several rounds of Arts Council of Wales under the Connect and Flourish grant. Our partners are Arts & Business Cymru, Disability Arts Cymru, People Make It Work, and Race Council Cymru.

You can find our previous reports and more versions of this present report on our website: <https://cfw.wales/index.php/report2023/>

## Methodology

The survey was open throughout July 2023, receiving 184 responses (12 in Welsh and 172 in English). The survey was done online through a form as well as a plain text format and was available in Welsh, English, spoken Welsh, spoken English, and British Sign Language.

## **About the author**

Jenny Mathiasson (she/they) is a freelance conservator, consultant, illustrator, and podcaster based in West Wales. She has been freelancing in the culture sector for over 15 years and is an industry leading voice in the field of heritage conservation. She is a member of the Institute of Conservation, the Welsh Museums Federation, and the Museums Association. She has been one of the core facilitators at Cultural Freelancers Wales during the 2022-2023 funding period.

## **With thanks**

The biggest thank you goes to everyone who took the time to fill out our 2023 survey, followed by everyone who helped us distribute and promote it. Warm thanks also go to Krystal Lowe, Becky Johnson, Angharad Davies, and Dr Jeremy Huw Williams for their input during the survey design phase. Further thanks to Dr Jeremy Huw Williams, Stephanie Roberts, Morgan Fox, Michael Rizzotti, Dr Ruwani Fernando, Matthew Lloyd-Strahan, Ross Graham, and Becky Johnson for their help and contributions to the final report.

# Who are cultural freelancers in Wales?

## Age and ageing

In general respondents were older than in the previous two surveys but freelancers from all age groups were represented. Most freelancers (77%) were 35-64 years old.

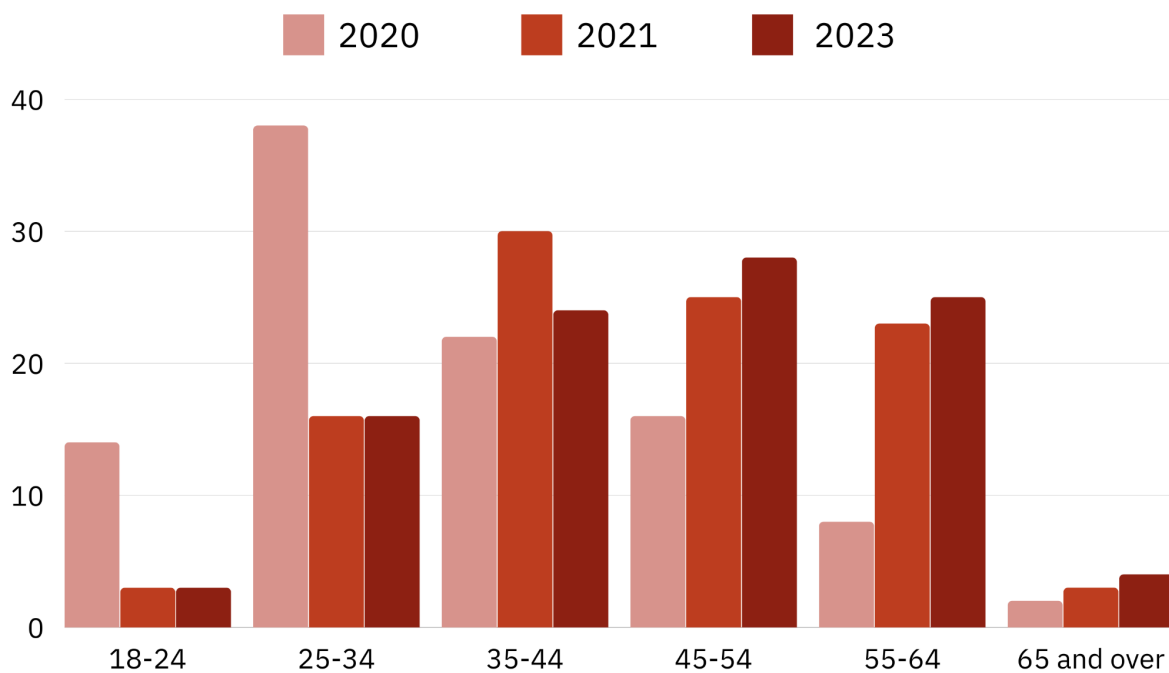


Figure 1: Ages of survey respondents (2020-2023).

Age was a prominent theme in this year’s survey: many freelancers felt that ageing meant they did not ‘tick the right boxes’ or could not get enough work to survive as they moved towards the conventional retirement age.

“Ageism is rife.”

“The arts appear to only be for people under 40 around here.”

“I’ve been in the industry for over 30 years but bullying has taken its toll.”

People reported feeling less ‘useful’ as they got older and like they ‘may as well not bother’ when applying for funding pots and commissions. Feelings of irrelevance, exhaustion, being adrift, and ‘gatekeeping’ were also mentioned. This echoes the recent discourse around ageism in The Big Freelancer Survey 2023 from Freelancers Make Theatre Work.<sup>1</sup>

Some freelancers felt ‘pulled towards training’ or teaching as a way of passing on skills and knowledge, particularly as worries around physical health increased.

“I'm getting older and dance is physically demanding.”

There were also worries around finances.

“I am 60 with no private pension, some savings but not much, no secure income streams.”

Wales has an ageing population and workforce<sup>2</sup> and the average age of a freelancer in the UK was 48 years old in 2022.<sup>3</sup> While no such number exists for Wales this still gives us an idea of the age profile of freelancers more generally. Across the UK 40-59 year olds account for half of the self-employed population.<sup>3</sup>

While growing older was seen as a barrier to success by many freelancers in the 45-65+ age range, the grass does not appear to be greener on the other side: younger freelancers also felt they lacked work, support, and consistency – all of which were commonly mentioned by older freelancers. This was felt especially keenly in more rural areas amongst young and old alike.

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<sup>1</sup> The Big Freelancer Survey 2023 report:  
<https://freelancersmaketheatrework.com/wp-content/uploads/2023/06/FMTW-Big-Freelancers-Report-2023.pdf>

<sup>2</sup> Population of Wales (Census 2021):  
<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/populationandhouseholdestimateswales/census2021>

<sup>3</sup> IPSE The Self-Employed Landscape 2022:  
<https://www.ipse.co.uk/policy/research/the-self-employed-landscape/self-employed-landscape-report-2022.html>



It is not clear whether the lower numbers of respondents under 35 – and under 25 in particular – is due to the distribution channels and marketing methods used to promote the survey, or whether this constitutes an actual trend. More research is needed to understand the profile of younger freelancers in culture, what barriers they may face, and how they find routes into the field.

## Freelancers' location in Wales

There was broad geographical spread amongst survey respondents, representing most local authorities and all counties across the country. 55% of responses came from South Wales, 28% from Mid and West Wales, and 17% from North Wales.<sup>4</sup> For context and comparison 21% of our respondents lived in Cardiff specifically.

	2023	2021	2020
South Wales	55% ▲	48% ▼	74%
Mid and West Wales	28% ▲	26% ▲	15%
North Wales	17% ▼	26% ▲	11%

Table 1: Where survey respondents have been located for each of our surveys. Triangles denote whether this number has gone up or down since the previous research project.

About 37% of cultural freelancers who responded live in Welsh rural areas.<sup>5</sup> Respondents from rural areas were most likely to work in **Music and performing arts** (37%), **Visual arts** (28%), and **Film, TV, video, radio and photography** (24%).

Freelancers in rural areas expressed feeling overlooked and reminded us that 'Wales doesn't end in Swansea or Cardiff' and that 'the valleys have more to offer than old mines' in terms of both heritage and living culture.

Transport links and travel expectations were highlighted by freelancers across Wales, both rural and otherwise.

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<sup>4</sup> *South Wales*: Merthyr Tydfil, Neath Port Talbot, Swansea, Bridgend, Rhondda Cynon Taf, Vale of Glamorgan, Cardiff, Caerphilly, Blaenau Gwent, Torfaen, Newport, Monmouthshire  
*Mid and West Wales*: Powys, Ceredigion, Carmarthenshire, Pembrokeshire  
*North Wales*: Conwy, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, Wrexham

<sup>5</sup> These are defined according to Rural-Urban classification systems via the Office for National Statistics:

<https://geoportal.statistics.gov.uk/documents/rural-urban-classification-2011-map-of-the-oas-in-wales-1/explore>

“Working in and from rural Wales has meant a life on the road. As cuts have bitten, my location has precluded me from a lot of work. The artists in rural areas are not supported. Most cultural life is about urban living. This has an impact on how/what our culture is and can be.”

“I gained extra remote work for a while but with the return to the office and hybrid, location is again limiting opportunities with companies wanting freelancers to be available to work onsite. Commuting to London isn’t viable for me (expensive and exhausting).”



Figure 2: Geographical coverage of responses. The darker the colour, the more responses came from that area. Squiggles are approximate as mapping was done on a postcode area basis.

## Freelance client location

On average respondents reported that 60% of their work was commissioned within or otherwise took place in Wales. There was great variety across different disciplines and more research is needed to see where Welsh freelancers work takes place geographically.

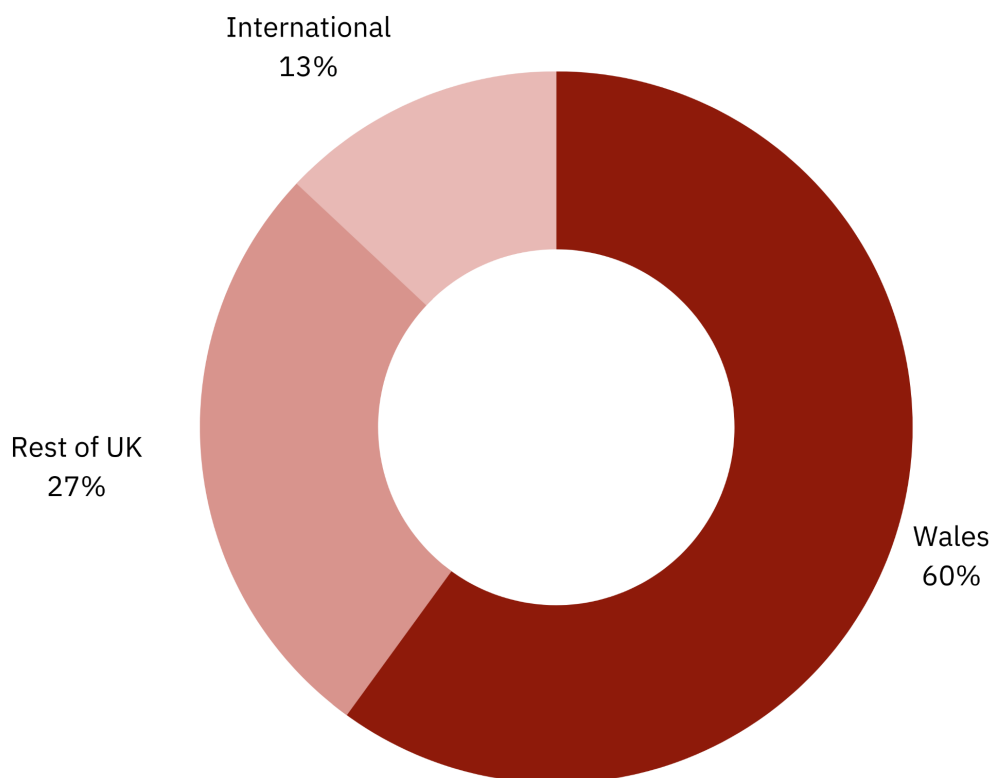


Figure 3: Where cultural freelancers in Wales undertake most of their work (on average across all sectors).

20% of respondents told us **all** of their work was Wales based. People who said their work was entirely based within Wales were most likely to work in the sectors seen in Figure 4. 'Other' included a variety of responses ranging from tourism and health to community and participatory arts practices. There was an evident focus on community driven work within this category which lends itself more to local and regional work.

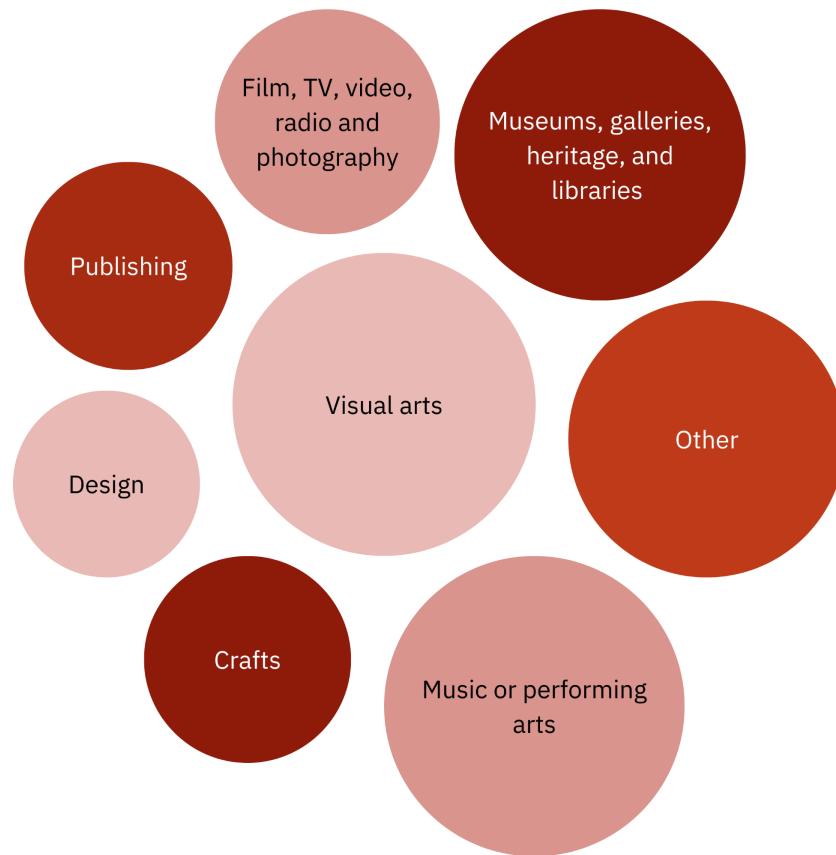


Figure 4: Proportional representation of the sectors that work entirely in Wales (20% of respondents). The larger the circle, the more freelancers reported getting their work exclusively in Wales.

Approximately 30% of freelancers got most of their work from the rest of the UK, with only two respondents stating they work **exclusively** outside of Wales.

Respondents getting the majority of their work from other places in the UK were most likely to work in **Music or performing arts** and **Film, TV, video, radio and photography**.

A very small group (7%) did most of their freelancing internationally. Freelancers in this group were most likely to work in **Visual arts** and **Advertising and marketing**. Freelancers often wanted to work more completely in Wales but felt the work could not be found:

“I want to work only in Wales but there aren’t enough opportunities.”

“Amser peidio penodi bobl o tu allan i Gymru heb wybodaeth o'r wlad a'i diwylliant i swyddi amlwg sydd angen y wybodaeth hyny.”

“I have had to go outside of Wales for commissions whereas pre-pandemic I worked almost exclusively in Wales, the domestic funding and opportunities have diminished notably.”

“Lack of support and opportunity in Wales, will seek elsewhere.”

## Gender

56% of respondents described themselves as female, and 40% as male. 4% described themselves as non-binary or other. Compared to the 2020 and 2021 surveys this is a slight decrease in male respondents and a small increase in both women and non-binary freelancers.

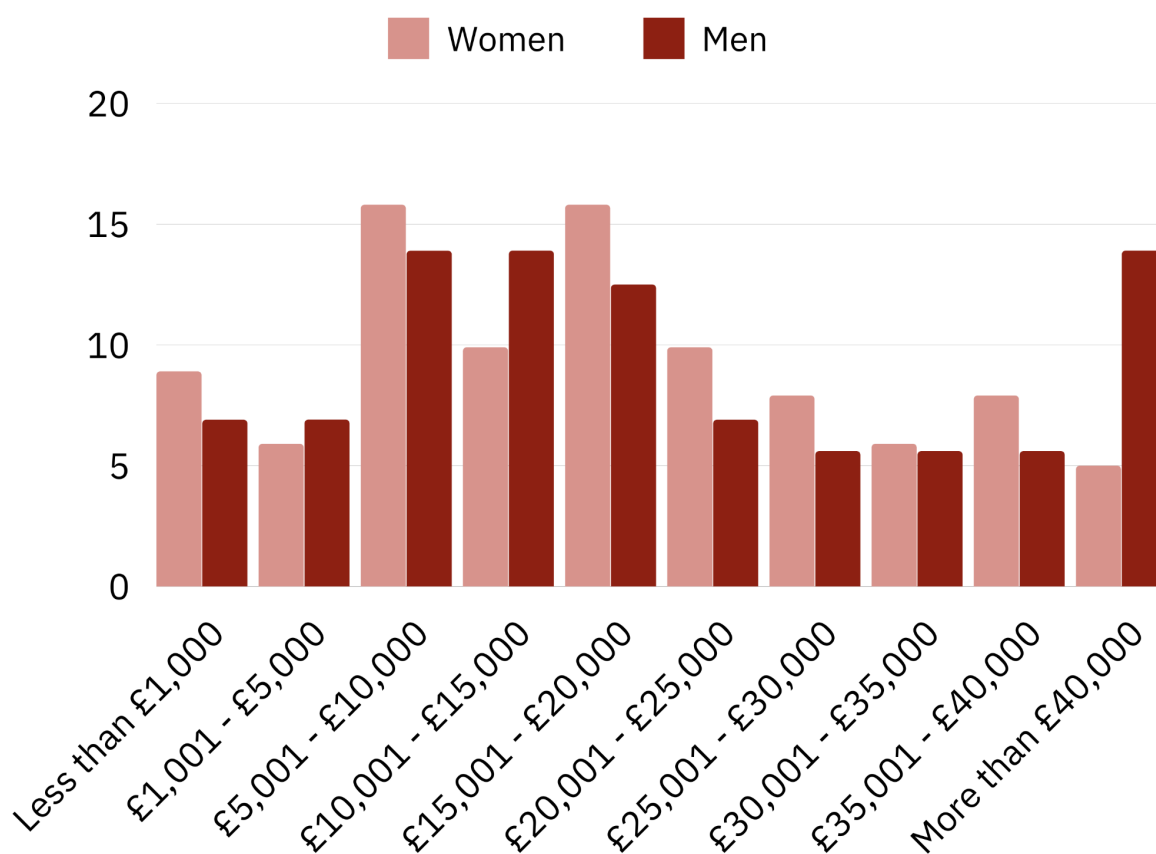


Figure 5: Relative male/female income.

Pay was a little more evenly distributed than previous years, with both men and women averaging in the £5,001 - £20,000 range. Women were still likely to earn at the lower end of the scale and men were far more likely to earn more than £40,000 per year. We don't have enough data for firm gender gap analysis but there is a significant gap in levels above £20,000 per year.

Meanwhile non-binary respondents all consistently earned below £15,000 (with an average of £5,000 - £10,000), though this can be partly explained by the majority of non-binary freelancers who responded to the survey trending younger (under 35) and being newer to freelancing. 43% had not freelanced before the pandemic.

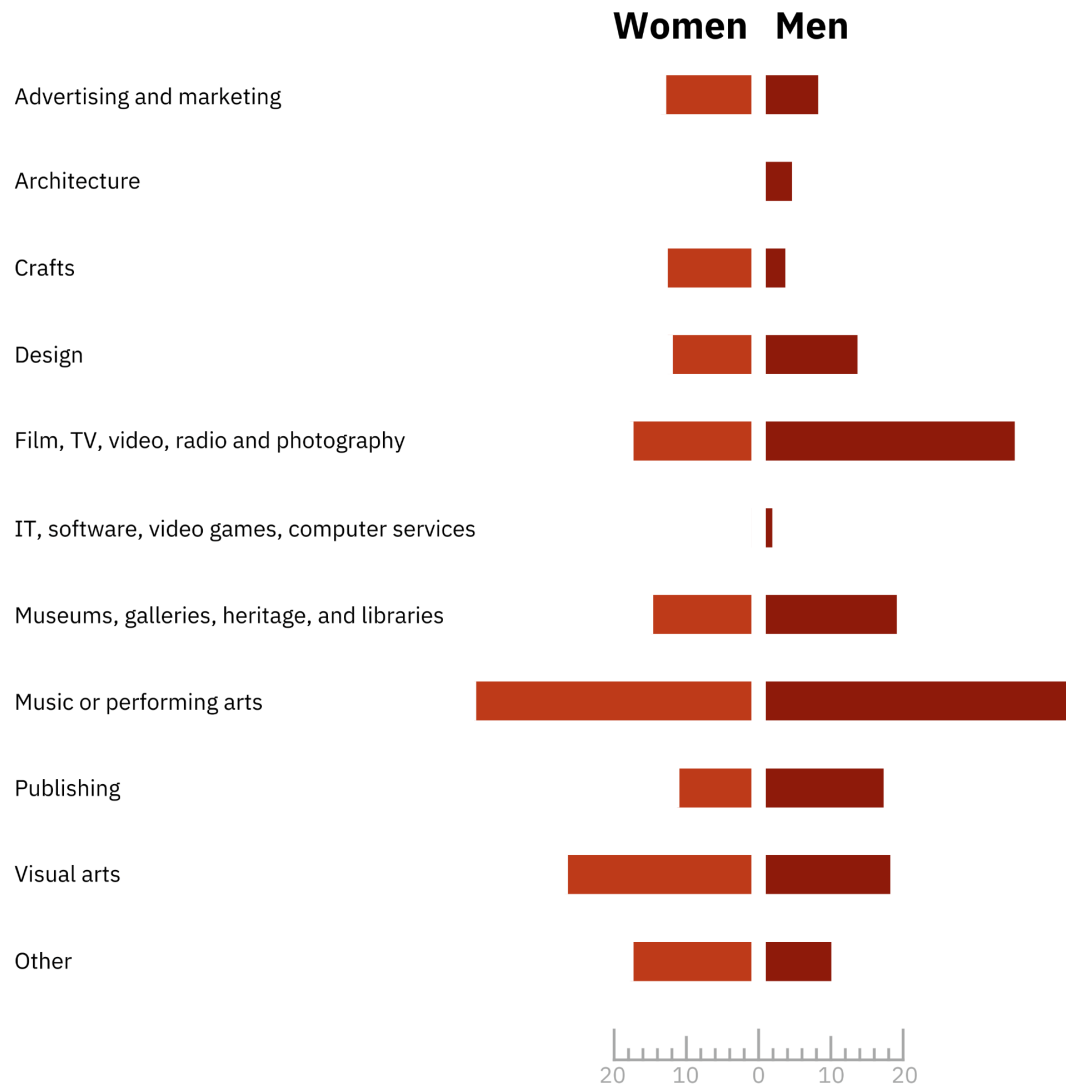


Figure 6: Relative overview of which sectors male and female respondents were most likely to work in.

As seen above both male and female respondents were most likely to work in **Music or performing arts**. Men were somewhat more likely to freelance in **Film, TV, video, radio and photography**. Women were slightly more likely to work in **Visual arts**. Only male respondents reported freelancing in **Architecture** and **IT, software, video**



games, computer services but those numbers were low. Non-binary respondents freelanced across the sector.

Female freelancers voiced concerns about sexism in the music sector:

“My line of work is very male biased, all companies I work for have male bosses and working as a female conductor is still regarded as unusual. I am still 'assistant' in many freelance roles despite my age and experience and good reputation. I am convinced that if I was male this would not be the case.”

Precarious work is still likely to hit female and non-binary freelancers harder than their male peers: both groups report significantly lower savings (20% lower for women and 50% lower for non-binary freelancers) and would struggle to pay bills, rent and/or mortgage if work fell through.

## Welsh language

Wales is a nation with three official languages - Welsh, English and British Sign Language.<sup>6</sup> As standard we offer our survey in Welsh and English in various formats. 7% of the survey responses were returned in Welsh (compared to 5% in 2021 and 18% in 2020).

We chose to ask a different question regarding Welsh language use in this year's survey: whether freelancers spoke no Welsh, were learning Welsh, or spoke fluent Welsh. This limited the possible responses from people who felt they spoke basic Welsh but were not active learners, which was flagged up by one respondent:

“A large range of people (like myself) who were at school in the 1970s speak some Welsh but are neither fluent nor actively learning.”

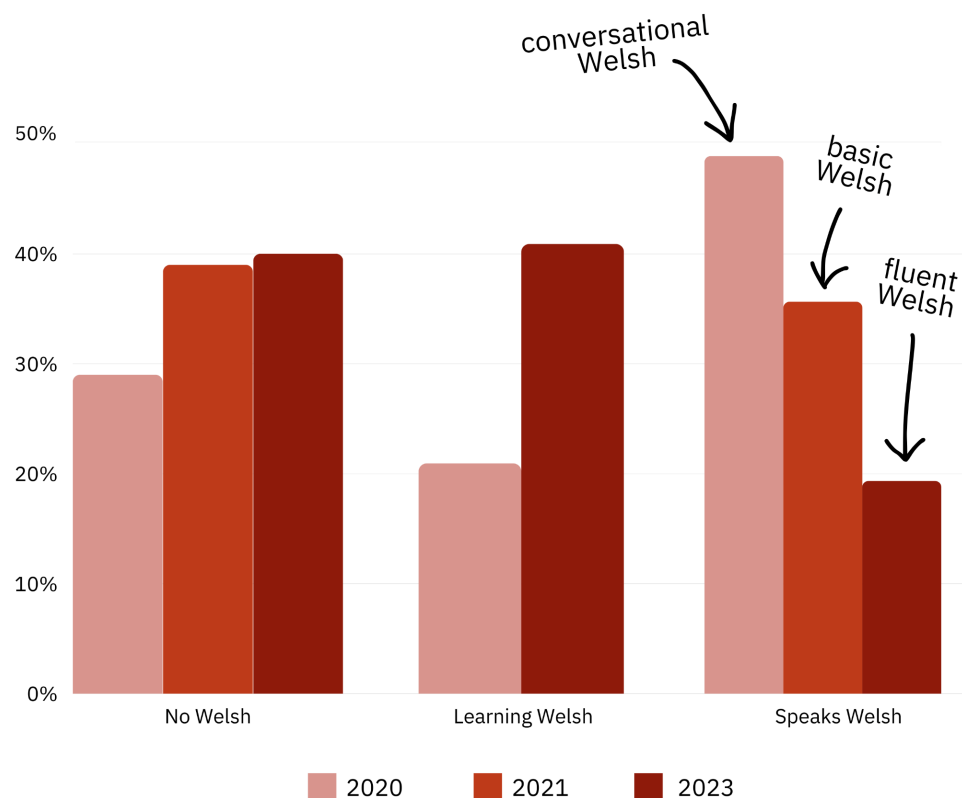


Figure 7: Overview of Welsh language knowledge amongst cultural freelance respondents 2020-2023.

<sup>6</sup> Since the passing of the BSL Act 2022: <https://bda.org.uk/bsl-act-now/>

Figure 7 on the previous page explores how Welsh language use has changed amongst respondents over the past few years, acknowledging the different nuances of ‘speaks Welsh’ - conversational, basic and fluent Welsh are not directly comparable but still tell us important things about the use of Welsh amongst cultural freelancers. While the proportion of people who speak no Welsh has gone up (from 29% in 2020 to 40% in 2023) it is heartening to see that the number of Welsh learners have doubled since 2020.

Recent numbers suggest around 17% of the working population in Wales speaks Welsh<sup>7</sup> and this tracks well with the 19% fluent Welsh speakers responding to our survey. If we include Welsh learners in this number 60% of Welsh cultural freelancers speak some level of Welsh. Female and non-binary freelancers were more likely to be learning Welsh than men.

Speaking Welsh was seen as an asset by respondents:

“Gallu siarad Cymraeg yn gwneud byd o wahaniaeth i y gwaith dwi yn medru cael - dylse Careers Wales ddathlu hyn mwy i blant a phobl ifanc.”

Many of the freelancers who were either actively learning or wanted to learn Welsh expressed that they wanted more support and opportunities:

“Subsidies (including living allowance) for total immersion Welsh language learning would be a massive benefit.”

“A need for more access to Welsh language projects for Welsh learners.”

Learning Welsh was also seen as a considerable barrier. Freelancers whose first language wasn’t Welsh nor English noted that their bi- or multilingualism often felt overlooked or irrelevant, potentially fuelling feelings of multiculturalism being unwelcome in the culture sector and Wales more generally.

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<sup>7</sup> Welsh language by population statistics (Census 2021):  
<https://www.gov.wales/welsh-language-population-characteristics-census-2021-html>

“As an immigrant from another country who is working long days to try and sustain a career, there also is a growing pressure to find the time to learn Welsh. Many producers are looking to increase their Welsh speaking creative teams to meet perceived [...] targets. [...] I 100% agree that the resurgence of the Welsh language is important and to be celebrated, but as someone not raised in Wales and who has almost no free time due to work for even hobbies, it is starting to feel like another barrier to having a freelance career in Wales.”

The Welsh government has committed to double the number of Welsh speakers by 2050<sup>8</sup> and freelancers are evidently wanting to learn: but this comes at a cost and is potentially exclusionary unless we can address these concerns.

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<sup>8</sup> Cymraeg 2050:  
<https://www.gov.wales/sites/default/files/publications/2018-12/cymraeg-2050-welsh-language-strategy.pdf>

## Disabled, D/deaf and neurodiverse freelancers

23% of respondents identified as disabled, D/deaf and/or neurodiverse using the social model of disability,<sup>9</sup> with a further 4% being unsure. This differed from our previous research where freelancers were asked about the more clinical definition of disability (in 2021 that affected 17% of respondents). Across Wales 21% of the population<sup>10</sup> identifies as disabled according to the 2021 census.

Respondents worked across all sectors but formed a slightly lower proportion of the freelancers working in **Visual arts (20%), IT, software, video games, and computer services (19%), and Museums, galleries, heritage, and libraries (19%)**. This may hint at those fields being less accessible, but variations are so small that more research would be needed.

Disabled, D/deaf and neurodiverse freelancers were more likely to experience financial hardship and have low savings (69% would not be able to meet their outgoings for three months if their work was cut unexpectedly) and regularly flagged up a lack of financial safety nets (e.g. sick pay) as a barrier.

Freelancers called for increased support, signposting, and more understanding from organisations hiring us:

“There's not enough support for disabled and neurodivergent creatives - I feel that as a younger person coming into the industry now realising I'm disabled, I struggle to access (or know where to access) support for applications/forms, as well as struggle to find the finances to find those folks.”

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<sup>9</sup> See language use around disability:

<https://www.disabilityrightsuk.org/social-model-disability-language>

<sup>10</sup> Census 2021 data on disability:

<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/disabilityenglandandwales/census2021>

“There needs to be more understanding about freelancers and no two freelancers being the same. I have often heard large organisations say to me ‘well our last freelancer could do X, Y and Z’ - this competitive and derogatory statement doesn’t make us want to work with you, instead makes us resent you.”

Some freelancers felt pressured into speaking up about barriers:

“I do not always talk about my barriers, I tend to shy away from using them as a means of discussion, and at the moment I feel like I should be doing that, even when I do not want to or feel that I need to.”

## Ethnicity

6% of the respondents were Black, Asian, and/or of multiple/mixed ethnicities (compared to 7% in 2021 and 5% in 2020) which is roughly in line with the current Welsh population.<sup>11</sup>

More than half (55%) of these freelancers reported an increase in work and over 80% had savings that could help them through a rough patch. However members of the Global Majority were twice as likely to earn less than white freelancers across most pay bands.

Global Majority freelancers reported they were likely to remain in the industry (89%) but all reported feeling unsupported in the culture industry. Half had seen significant impacts of Brexit on their work.

There were several comments from white freelancers expressing ‘concern’ about funding and projects being earmarked for support of Global Majority freelancers and other disadvantaged groups. While we recognise the frustration of competing for less money, this is not solved by excluding minorities: diversity and inclusion enhances freelancing and the culture sector. The industry as a whole is already heavily rigged in favour of white freelancers who often come from privileged backgrounds.<sup>12</sup> This cannot continue. Cultural Freelancers Wales firmly supports positive action<sup>13</sup> and inclusive practices. These are core to our values as an organisation.

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<sup>11</sup> Ethnic group, national identity, language and religion in Wales (Census 2021): <https://www.gov.wales/ethnic-group-national-identity-language-and-religion-wales-census-2021-htm>

<sup>12</sup> Panic! Social Class, Taste, and Inequalities in the Creative Industries: <https://createlondon.org/wp-content/uploads/2018/04/Panic-Social-Class-Taste-and-Inequalities-in-the-Creative-Industries1.pdf>

<sup>13</sup> Positive action in the workplace: <https://www.gov.uk/government/publications/positive-action-in-the-workplace-guidance-for-employers/positive-action-in-the-workplace>

## Class

We wanted to know more about the socio-economic landscape of the Welsh culture sector: to avoid inherent biases and discomforts around self-identifying as a person of a specific class we asked respondents about the occupation of their household's primary income earner when they were 14 years old<sup>14</sup> and analysed the results:

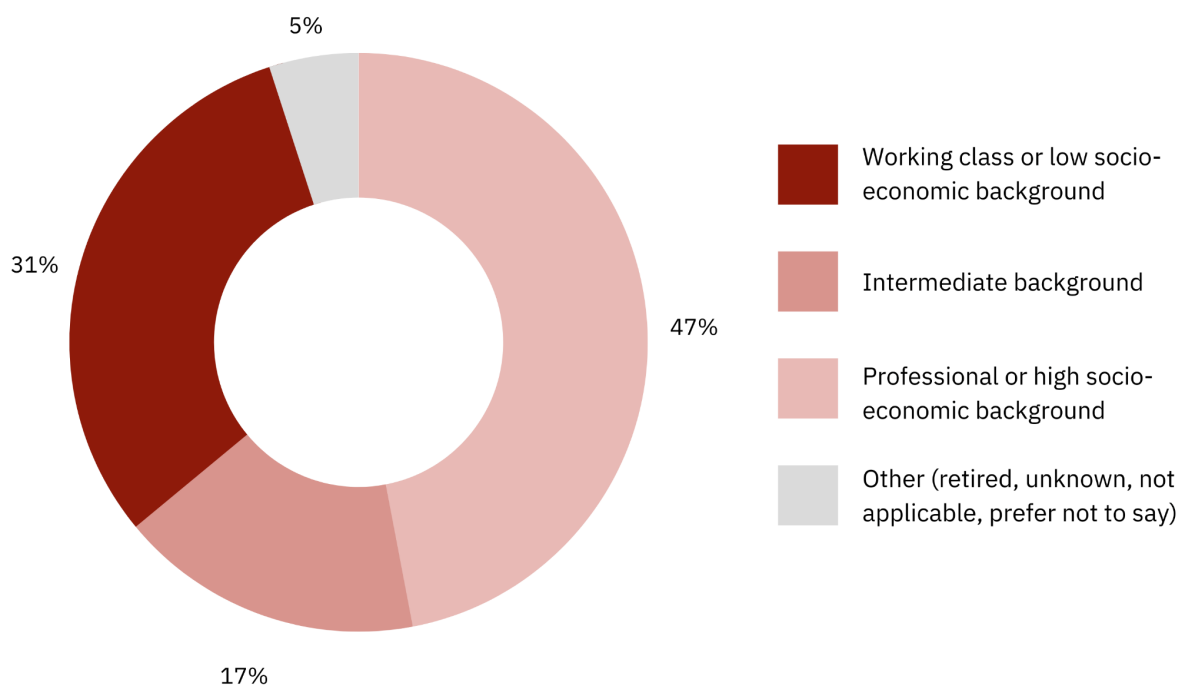


Figure 8: Respondents' backgrounds based on the occupation of their primary household income earner when they were 14.

The majority of cultural freelancers in Wales come from a Professional Background (47%). 17% of the respondents were from a so-called Intermediate Background. Around a third (31%) of freelancers came from a Working Class Background, a theme that came through strongly in the free-text comments section of the survey.

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<sup>14</sup> Measuring Socio-Economic Background in Your Workforce (2018):

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/768371/Measuring\\_Socio-economic\\_Background\\_in\\_your\\_Workforce\\_recommended\\_measures\\_for\\_use\\_by\\_employers.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/768371/Measuring_Socio-economic_Background_in_your_Workforce_recommended_measures_for_use_by_employers.pdf) and Socio-Economic Diversity and Inclusion Toolkit for Creative Industries:

[https://assets.publishing.service.gov.uk/media/615453128fa8f529777ffa91/SMC-Creative\\_Industries-Toolkit\\_Sept2021\\_1.pdf](https://assets.publishing.service.gov.uk/media/615453128fa8f529777ffa91/SMC-Creative_Industries-Toolkit_Sept2021_1.pdf)



“Poverty and lower socio-economic background is still a huge hindrance.”

“Being working class means I can’t afford to have time off between jobs, meaning I never get a break and it’s exhausting.”

“I feel I see more people from more advantageous backgrounds getting roles, opportunities or excel faster in the industry.”

“As a working-class queer person, I've struggled to work as a freelancer full-time. I have come across many barriers in many directions that have limited my ability to work and have considered packing it in several times due to the lack of opportunities I have access to.”

Working class freelancers had generally experienced a decrease in work and were less likely to be learning Welsh, often citing a lack of time outside of work. 65% would struggle to meet rent/mortgage payments and bills if their work fell through - similar numbers (64%) were noted amongst Intermediate Background freelancers.

Ultimately Professional Background freelancers were the only ones who reported financial resilience in terms of savings (54% reporting that they could pay their expenses for three months). They were also the most likely to want to stay in the industry.

## Career length and type

The majority of the respondents are still mid- to late career freelancers with significant work experience, which matches our previous findings.

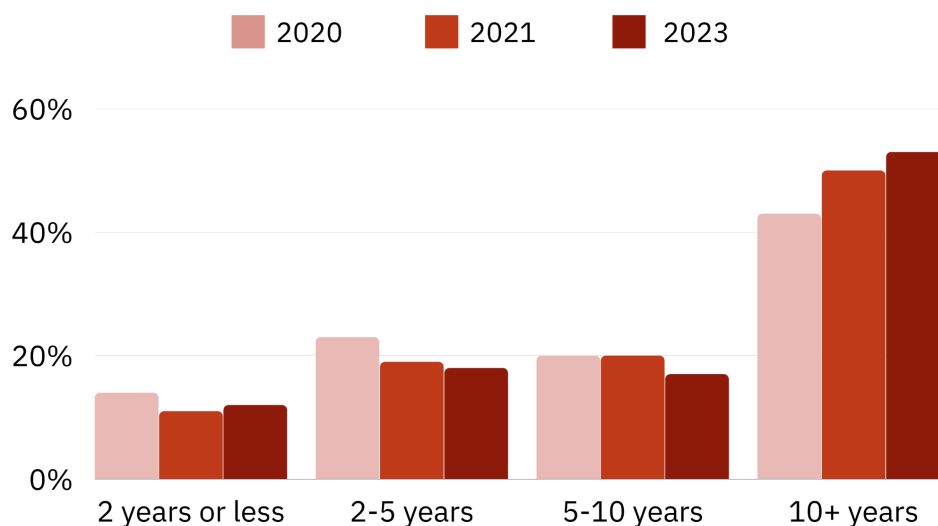


Figure 9: How long respondents have been freelancing in culture (2020-2023 comparison).

57% of respondents reported working in one sector only (see Figure 10 for an overview of the sectors represented across the Welsh cultural landscape) but working across two or more sectors was still highly prevalent, highlighting the continued trend towards having a varied portfolio style career.

We asked freelancers to give us their preferred job title in this survey (“Describe your job with 1-2 words”), and we received more than 85 different self-identifying job titles. To the right are the 10 most commonly given ones.

### Top 10 freelance job titles

1. Artist 8%
2. Musician 8%
3. Illustrator 7%
4. Producer 7%
5. Writer 6%
6. Consultant 5%
7. Facilitator 3%
8. Actor 2%
9. Designer 2%
10. Director 2%

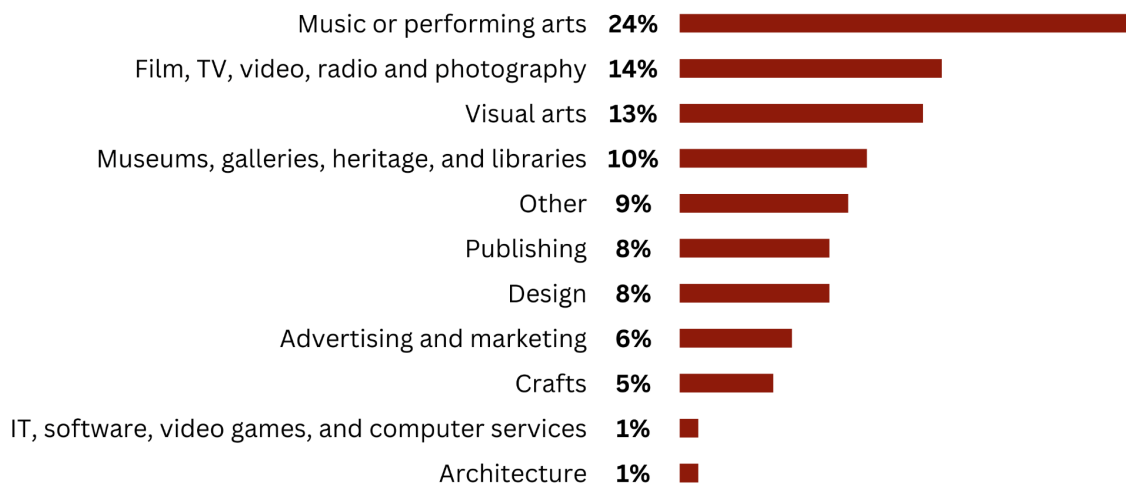


Figure 10: The sectors respondents reported working in according to frequency in 2023.

The category ‘Other’ when discussing the sectors within culture is as diverse as its name suggests: this group included highly specialised artforms, healthcare, community or participatory disciplines, tourism, sustainability, small business owners, education/learning/engagement, and third sector freelancers (to name but a few).

In terms of employment status most respondents were self-employed (69%) or a mixture of self-employed and employed (27%). A small number (2%) were retired.

Many freelancers expressed that their dual employment status was out of necessity for survival:

“I work full-time in an unrelated field. The vast majority of my income comes from this. My freelance role is a side gig / hobby.”

“I work PAYE to support my largely underpaid freelance work.”

“The majority of my income comes from a ‘day job’ in the education sector. I don’t currently feel like I can be resilient relying only on freelance work.”

“My survival as a freelancer depends on being able to take on corporate (i.e. non-creative) work as well. The creative work I do as a freelancer is precarious. It is up and down, but I'm only able to stay there because there are other things I can do.”

“I have set up a [limited] company in a different field and am working towards leaving the creative industries in the next two years, as I can't afford to keep doing what I am doing. It is exhausting having to do so much more work just to stay afloat.”

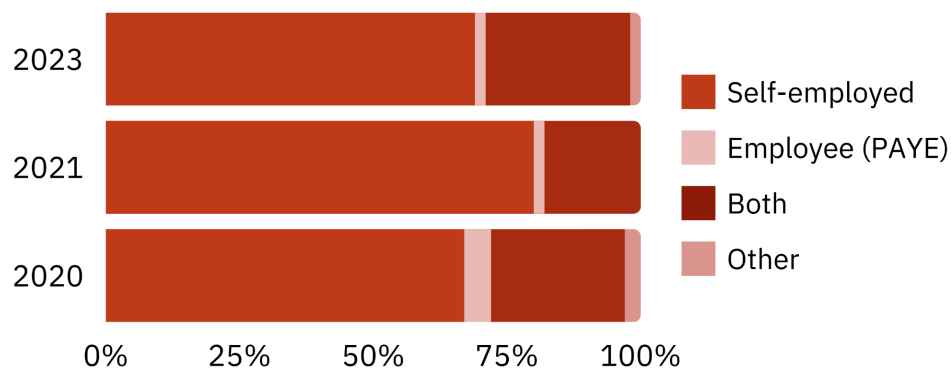


Figure 11: Employment status of respondents (2020-2023 comparison).

Recent figures from the Musicians’ Census shows that supplementing income in the ways mentioned by freelancers above is very common<sup>15</sup> and while those figures are not exclusively from Wales it is a plight of creative and cultural freelancers across Britain. In a recent write-up from Arts Council of Wales<sup>16</sup> it was mentioned that 40% of people working in the arts sector were planning to seek additional employment outside the sector in order to survive.

<sup>15</sup> Musicians’ Census 2023: <https://www.musicianscensus.co.uk>

<sup>16</sup> Written evidence from Arts Council of Wales (September 2022): <https://business.senedd.wales/documents/s130508/Written%20evidence%20from%20Arts%20Council%20of%20Wales.pdf>

## Money matters and the cost of living crisis

The most common annual income level for a cultural freelancer responding to the survey was £5,001 - £10,000, lower than in our previous research. This was followed very closely by the £15,001 - £20,000 range, suggesting an average lies somewhere between these. Income was less than £20,000 for 57% of respondents (63% in 2021 and 61% in 2020).

The average income in Wales is reported to be £33,900<sup>17</sup> in 2022, giving us an indication that cultural freelancers earn at least 40% below that. It is worth noting that we asked about freelancers' income in the previous tax year which is likely to have been lower owing to the COVID-19 pandemic, but at the time of the survey this was very likely to be the most recent year people had full accounts for without having to estimate.

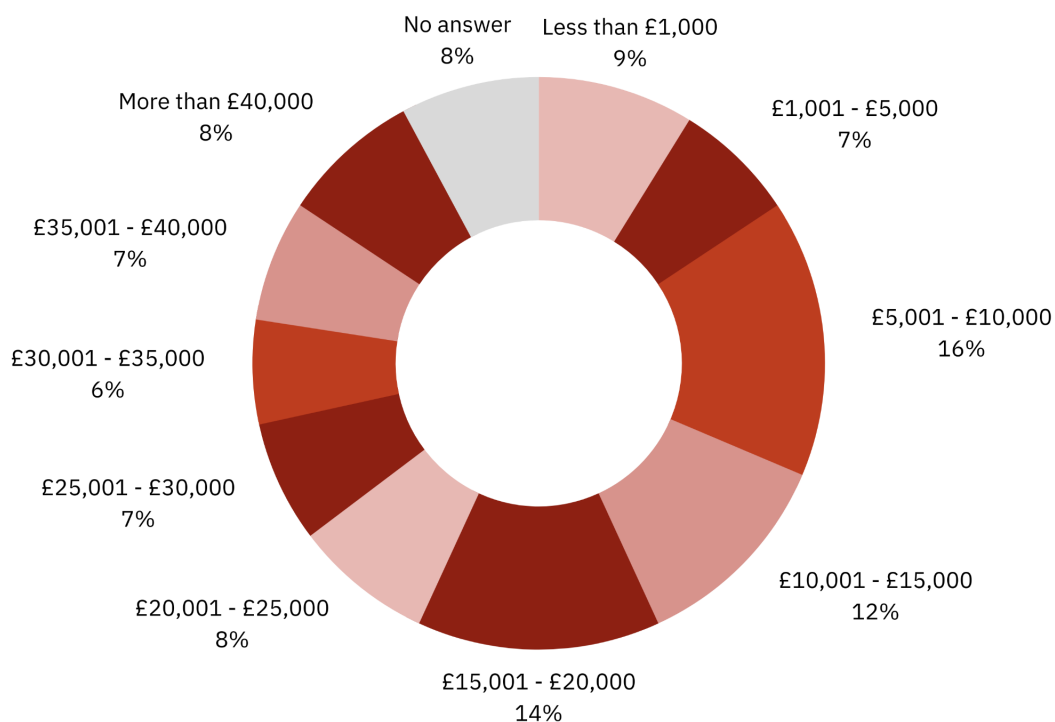


Figure 12: Breakdown of how much cultural freelancers earned in the 2020-2021 tax year.

<sup>17</sup> Wales average salary stats via Plumplot:  
<https://www.plumplot.co.uk/Wales-salary-and-unemployment.html>

Average income ranges were lowest on average in **Advertising and marketing, Film, TV, video, radio and photography, and Music or performing arts**. Freelancers in North Wales were slightly less likely to earn £20,000 and above.

Freelancers' comments reflect the current landscape in 2023 best:

“If I'd stayed in teaching I would now be earning approx £44K compared to my approx £20K as what is seen as a very successful freelancer in my field.”

“Theatre designers are still grossly underpaid for their time (most established professionals are earning well under minimum wage) and no effort is being made by the industry to either reduce the required hours or increase those fees. It is an unsustainable career financially, mentally, and artistically and serious action is needed. My earnings last year appear well as a number, but it meant working 14+ hour days, often 7 days a week to balance all of those projects and deliver enough work to have some financial stability.”

“I will need to supplement my income with a part time job to afford my bills soon.”

“I'm a single parent, and I'm struggling to earn enough to live on, let alone save. All the jobs I take on inevitably require far more work than we are contracted to do... even if they are paid well. I want to be able to afford normal things, like to go on holiday, to not worry about car maintenance, to upkeep my home. At the moment, I can't do this - I am hand to mouth. But I'm not sure what else I can do, if I'm not working in the arts.... I've been in the industry for 25 years and am very experienced... but as a freelancer I am worried about the work drying up.”

“Currently owed money from [the] publisher because of two delayed books due to [COVID-19]. They've been pushed back until Easter 2024 this would give me a year's worth of funds to live off whilst working on other projects. However, such is the state of the economy and finance will probably have to downsize.”

“It may be that I need to diversify a part of my work to another sector and remain part time in culture.”

“Not enough understanding among salaried staff of what is a fair pay rate for freelancers, and not enough supportive working practices.”

“Cultural attitudes to freelancers in the arts are still based around 'doing it for love' and that is a challenge to realistic income.”

“I've had to radically revise my expectations of how much I might earn from freelance work.”

“Producers and hiring staff need to get a clearer understanding about the costs of being a freelancer and stop trying to offer stupidly low rates.”

“Freelancers are the first cost to cut in uncertain times.”

Given the number of people responding with long careers in the sector (53% have freelanced 10+ years) and the most common age range of the respondents (45-54) none of these low pay rates can be explained based on those factors.

Since late 2021 the UK has experienced a cost of living crisis with soaring costs and high inflation<sup>18</sup> – while the rate of inflation has now slowed, the combination of higher prices of goods and increased bills continue to have a severe effect on society: it impacts audiences, freelancers, and organisations all at once. We know the costs of making theatre productions and similar have increased by 20-40%<sup>19</sup> compared to 2021 costs, for example. In light of this we asked freelancers if they had raised their rates (whether hourly or daily) in line with inflation to reflect the

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<sup>18</sup> Cost of living latest insights from ONS (accessed October 2023):

<https://www.ons.gov.uk/economy/inflationandpriceindices/articles/costofliving/latestinsights>

<sup>19</sup> Written response from Arts Council of Wales (September 2022):

<https://business.senedd.wales/documents/s130508/Written%20evidence%20from%20Arts%20Council%20of%20Wales.pdf>

increased costs of living and increased costs of materials: only 32% stated that they had.

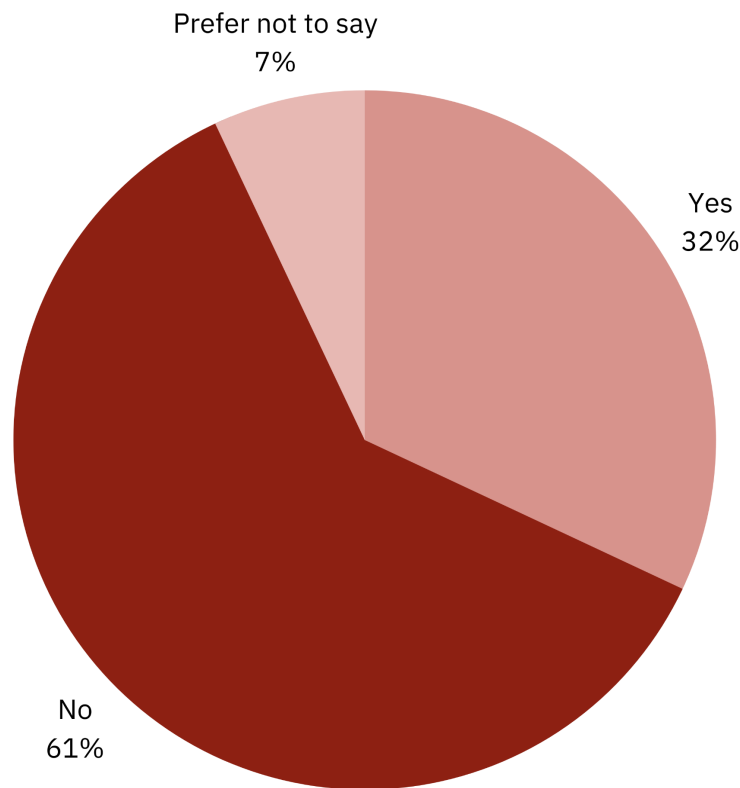


Figure 13: Answers to 'Have you raised your rates in line with inflation?'

Many freelancers felt they had no individual power to increase their rates and that industry wide change and lobbying would be needed to turn the tide:

“The daily rates paid have been stuck for years. I have to layer many more contracts now, to keep enough money coming in. The result is I am always working, no work life balance at all.”

“Freelance rates are not increasing with the rate of inflation and the cost of living.”

“Often rates are set by [organisations] rather than by individuals and it’s a take it or leave it negotiation as so many are desperate for work.”



“Concerned about the lack of increase in day rate due to current cost of living rises.”

“Everywhere is choosing the minimum level of fee regardless of the size of the venue. More needs to be done by the Arts Council of Wales to force change within organisations.”

Others felt more empowered to make those changes, either based on union membership or through support from peers:

“I raise my fees every year. I’ve been encouraged by fellow freelancers and believe everyone should. Sure, your work may change, but you have to put survival over the discomfort of talking prices.”

Some freelancers empathised with clients and customers being able to spend less during a cost of living crisis, particularly if these were individuals or community groups.

“Customers are finding it very hard to justify spending in the creative sector. Everyone is cutting on spending no matter what size of business that you are working with. Fellow traders and self-employed workers are finding trade very slow right now.”

We also asked freelancers about their financial precarity by posing the question: ‘Thinking about your savings: would you be able to pay your rent/mortgage and bills for the next 3 months on what you have saved?’ A small number of respondents opted out of this question and we recognise that this can be a stressful and potentially triggering line of questioning.

Out of the freelancers who answered 51% would not be able to survive on their savings, painting a stark picture of how precarious the situation is for many.

Freelancers working in **Music or performing arts** and **Visual arts** were harder hit on average in terms of lack of savings.

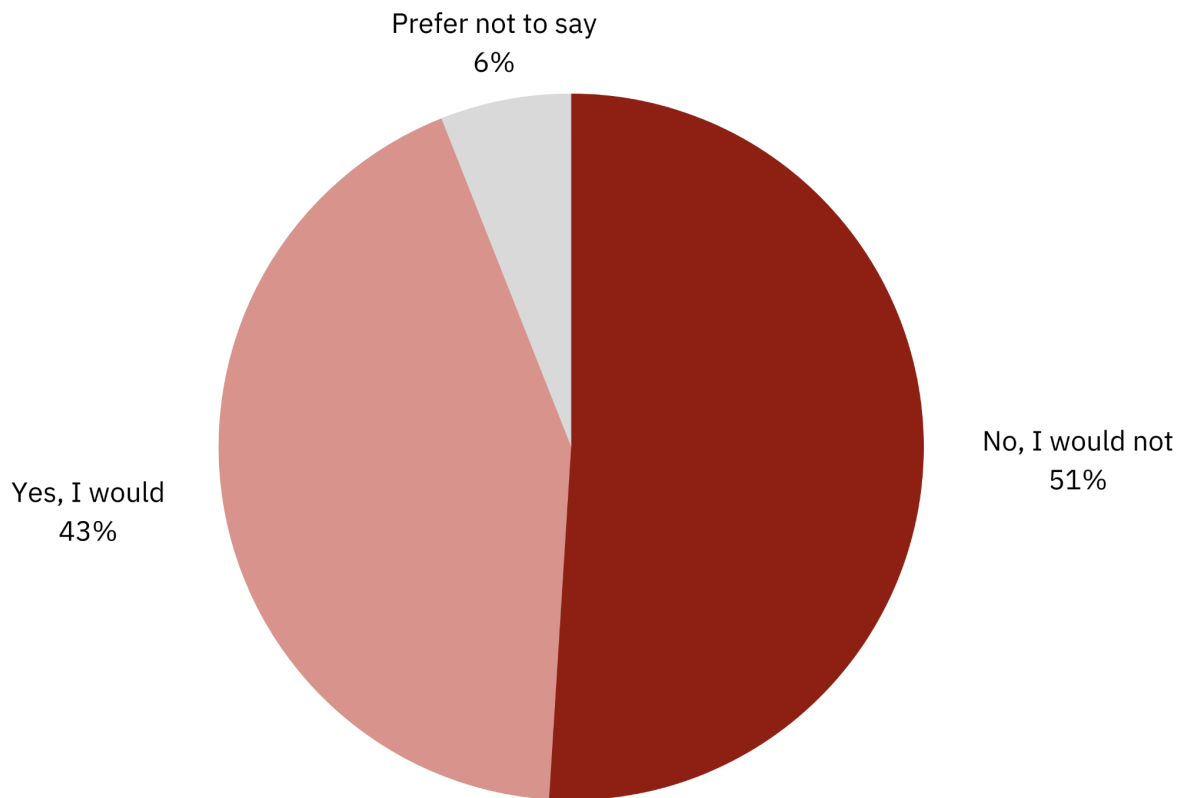


Figure 14: Respondents' answers to the question 'Thinking about your savings: would you be able to pay your rent/mortgage and bills for the next 3 months on what you have saved?'

People also highlighted other financial precarity, such as struggles with getting Universal Credit or entering into tenancy agreements:

“As a newer freelancer I've also struggled to get housing without a guarantor as a renter, and am having to wait until I can prove my income well enough in order to get a mortgage, something my counterparts who only earn PAYE don't have to do.”

## Work and outlook

Cultural freelancers were hit hard during the COVID-19 pandemic, losing over 80% of their work.<sup>20</sup> This year we asked freelancers whether their levels of work had gone up or down compared to pre-pandemic levels.

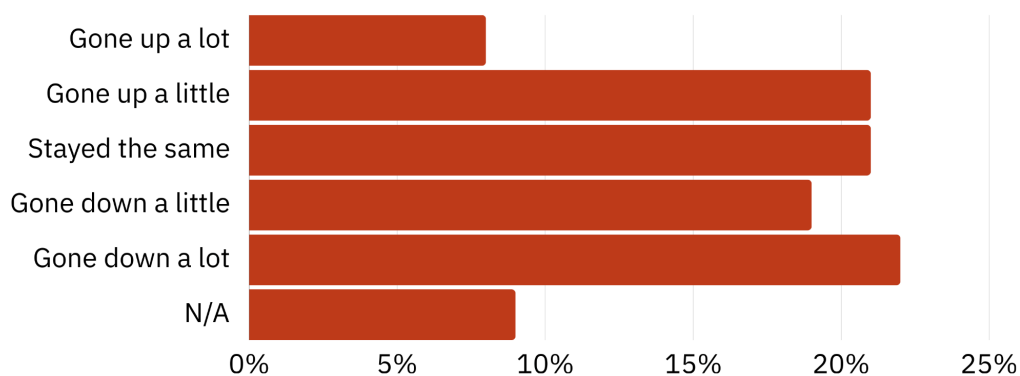


Figure 15: Respondents' answers to whether the amount of freelance work had gone up or down compared to pre-pandemic (2020) levels.

29% of freelancers had seen an upswing overall while 43% had seen a downward trend in the amount of work they do, even three years on. The amount of work had been stable, or returned to pre-pandemic levels, for 21%.

As we can see in Table 2 on the following page the some sectors were harder hit than others by decreased amounts of work: freelancers in **Music or performing arts** struggled the most, followed by **Film, TV, video, radio and photography** and **Other**. There were also many sectors that trended towards increased or stable work levels, even if these are not as optimistic as one might like.

We also asked freelancers how they felt about the culture sector at large: did they see themselves staying or leaving the industry? It was a relief to see that 71% of respondents were either definitely staying or likely to remain in the cultural freelancer sphere, but as we have highlighted already that does come with a lot of

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<sup>20</sup> 'Road to Recovery?' (2020): <https://cfw.wales/recovery>

caveats regarding precarity. 25% are on the fence about staying or leaving. These numbers align closely with our 2021 research data (72% would continue working in the sector and 23% were unsure).

Has your work gone up or down?	↑↑	↑	=	↓	↓↓
Advertising and marketing					
Architecture					
Crafts					
Design					
Film, TV, video, radio and photography					
IT, software, video games, and computer services					
Museums, galleries, heritage, and libraries					
Music or performing arts					
Publishing					
Visual arts					
Other					

Table 2: Visualisation of how work has gone up or down (or remained the same) across the different culture sectors. The darker the colour, the more respondents ticked this option.

White boxes have no data.

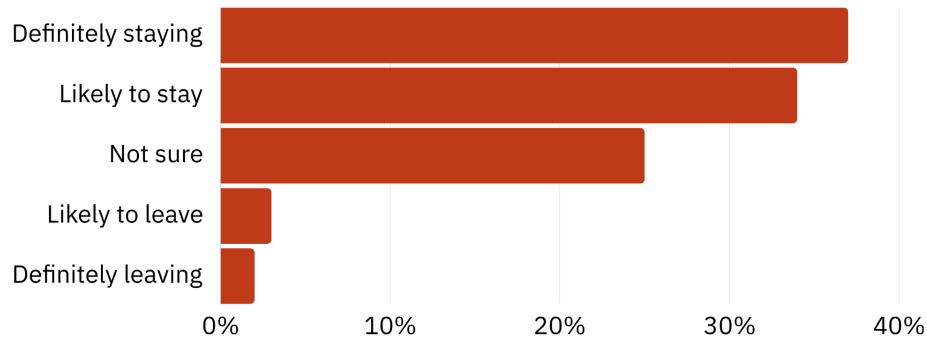


Figure 16: Responses to whether or not freelancers planned on staying in the sector.

Freelancers were vocal about their reasons for wanting to leave or feeling uncertain about remaining in the sector, citing stress, lack of work-life balance, and a ‘lack of appreciation of bespoke services’ amongst other things. Limited opportunities and lack of money and support were the most commonly mentioned barriers.

“I don't want to leave but I've not had work for 9 months. I cannot survive. [...] Productions in Wales bring in outside crew or are so remote they aren't accessible to me as I don't drive.”

“Gwaith yn brin. Methu fforddio gweithio ar gollod bellach.”

“After 20+ years I’m looking for a job with a regular salary.”

“Actively looking for paid employment, including away from the arts.”

“I want to stay in the sector, I would love to freelance full time. But the lack of security of work, support if sick, and lack of knowledge and support for working with freelancers that most organisations have makes it hard.”

Some freelancers struggled with changing work practices in their sector:

“I have struggled since the pandemic and am barely working mostly due to everything being done by self-tape which is akin to acting in a vacuum. How am I going to work in the future if I am not meeting directors and casting directors in person anymore?”

There were also voices of hope and renewal:

“I’m staying. I love my art and hope the financial situation will improve.”

“I feel very lucky to work in this sector and am driven by a mission to support people and organisations in the sector.”

“I feel that creative freelancers and full time self-employed musicians in particular are very misunderstood and undervalued. But there’s always hope for improvement. Musicians continue to fight the good fight. [...] There’s hope.”

“I have never been fully in the sector, I am leaving my permanent job to go into the sector.”

On the subject of outlook we asked freelancers whether they felt supported in the sector, whatever that meant to them personally. The responses were varied but the majority (71%) felt largely unsupported. Several commented that they felt supported during the COVID-19 pandemic but now felt they were ‘left to fend for themselves’ or that it is too arduous to look for support.

“Mae’n waith i chwilio am gefnogaeth.”

“I’ve had to make use of paid memberships to professional organisations or free forums to get general advice and support.”

“I’d love to join a union but don’t have a steady enough income at the moment to be able to afford it. I’d also love to have something like a regular meet-up for co-working or accountability between other freelancers.”

“The support I receive as a freelancer is minimal in Wales. Indeed, it is the reason why, year-on-year, the percentage of work I do within the country has steadily diminished. Despite living in Wales, I do less than 10% of my work in the country; I expect this to be even less next year. Opportunities for networking within my particular field are few and far between, and rarely have a Wales-specific focus.”

Freelancers starting out in the sector and those in supporting culture roles (e.g. people working in fundraising, marketing, evaluation) felt particularly neglected and alienated.

When freelancers expressed that they did feel supported this often came down to having a supportive environment around them: friends, family, and peers. Many highlighted the need for good networks, not merely for finding work but for cheering one another on.

“This varies from job to job but I feel most supported when I am working alongside other freelancers. I am also lucky to have several freelancers as friends.”

“I think that people are very supportive. And people in organisations who I work for on a freelance basis are good people and generally they pay promptly and treat people fairly.”

“A lot of my support comes from other freelancers that I collaborate with, support in finding work, writing applications etc.”

Some expressed surprise: they never imagined they could ask for support to begin with, or felt like freelancing automatically meant they had to be lone wolves. People in this category highlighted that there is a lack of awareness of what help would be available and where to go.

Freelancers are resourceful people and below is a selection of quotes highlighting some of the respondents’ ideas for solutions and ways forward:

“Feels like community would help. Being part of a creative team.”

“I would like to see more competitions with prizes organised for freelancers in various industries.”

“Funding needs to continue being invested in organisations that go way and beyond to support their communities through the arts.”

“[The] French model of supporting creatives in the industry with a minimum grant per person would make it more sustainable so that the feast-famine element is removed.”

“I think freelancers need to have a strong voice in portfolio review. [...] I would like to see critical reflection on the decisions that are made. If we remain with the same portfolio [then] freelancers will continue to suffer.”

“We also need more power to call out bad practice. [...] Too many freelancers are taking underpaid work and are so happy to be working they don’t feel they have the power to complain!”



## Impact of Brexit

Part of our research focused on the fallout of Brexit, as this had been flagged up as an area for concern amongst freelancers. Brexit officially occurred on January 31st 2020 and its effects are often overshadowed by the subsequent COVID-19 pandemic and the cost of living crisis, but measuring its impact was an important factor in this year's survey.

45% of respondents reported that Brexit had not impacted their freelance work. Freelancers in Wales working in **Advertising and marketing, Publishing, Architecture, and IT, software, video games, and computer services** were the most unaffected by Brexit according to the survey responses.

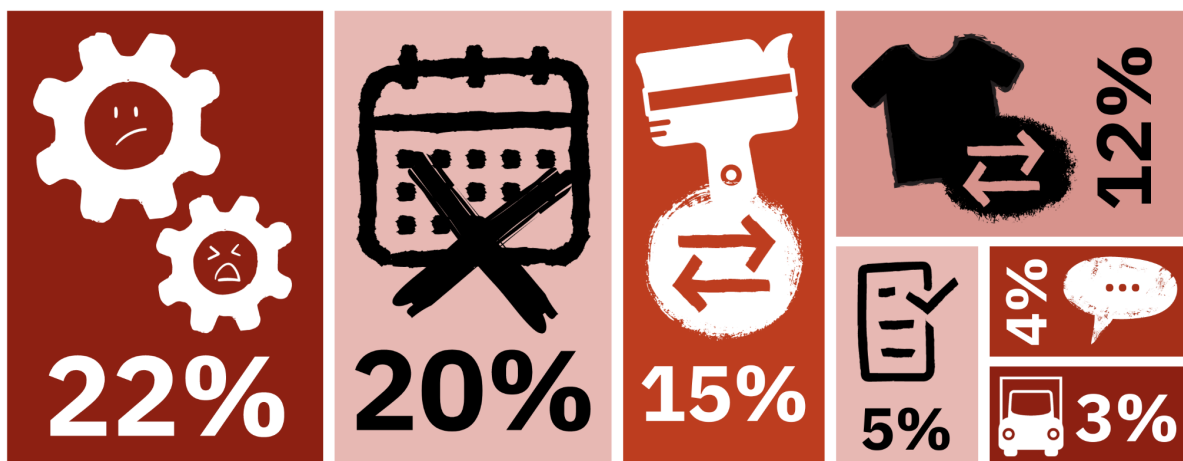


Figure 17: Visualisation of Brexit problems ordered by frequency. These include: collaboration difficulties, cancellation of work, import issues with supplies, import issues with merchandise, needing special permits, 'other' and difficulty with vehicle movement.

Despite this no sector was unaffected. While freelancers working in **Music and performing arts** were the least likely to notice an impact of Brexit on their work (27% ticked 'I have not noticed any effect on my work from Brexit') the same sector reported the most loss of work in the EU (18%) and the highest instance of struggling to collaborate with other culture workers in Europe (26%).

Loss of work and collaboration difficulties were also key difficulties for freelancers in **Film, TV, video, radio and photography, Visual arts, and Museums, galleries, heritage, and libraries.**

The movement of supplies and merchandise across borders was predominantly a problem for **Visual arts, Design, and Crafts** practitioners but also caused headaches for **Film, TV, video, radio and photography, Music or performing arts, and Museums, galleries, heritage, and libraries.**

Freelancers did feel the sting of Brexit, both in terms of lost opportunities and greater competition for available funding pots:

“I’ve had less international work than in the past.”

“Impact still to reveal itself in full. Less funding around generally - hard to know how much is due to Brexit.”

“As a producer I see less funding programmes available for these types of collaboration.”

“No EU funding available. Written on audition adverts ‘please do not apply if from UK’ etc.”

“Brexit has severely impacted my work sector, there has been absolutely no support from anybody. [...] Brexit to me and my contemporaries feel like the biggest loss of our rights in this life-time. The UK now feels more than ever like a hostile attitude and environment for musicians and artists.”

“Brexit has seriously affected my work opportunities as part of a UK based live events industry that was (pre-Brexit) the acknowledged largest supplier of live event and conference expertise in Europe and beyond.”

“Less funding from the EU means fewer new projects.”

“The levelling up funding hasn't reached my work areas yet. Nor do I have much confidence it will.”

The sentiments above are mirrored in the findings of the UK-wide Big Freelancer Survey 2023<sup>21</sup> which focused on theatre and performing arts in particular. 78% of their respondents felt Brexit was a source of uncertainty and the report flagged up problems around work visas, import duties, and undermining collaborative work.

Some impacts were emotional, including adversely affecting the mental health and hampering the confidence of freelancers:

“Reluctance to expand into international export.”

Others expressed that the effect was not immediate but that partnerships and the funding available in the pockets of clients had all diminished.

Respondents mourned the total loss of European commissions and the cultural capital that propped up many ancillary services (e.g. co-working spaces and free business development support). Freelancers relying on tourism and international sales also expressed that they feel ‘cut off’ and forgotten.

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<sup>21</sup> The Big Freelancer Survey 2023 Report:  
<https://freelancersmaketheatrework.com/wp-content/uploads/2023/06/FMTW-Big-Freelancers-Report-2023.pdf>

## Conclusions and recommendations

While Wales' freelance population has gone down by 17% overall<sup>22</sup> in recent years the Welsh creative industries have remained resilient and some (notably **Architecture and IT, software, video games, and computer services**) are recovering.<sup>23</sup> That knowledge is tempered by the awareness that the threat of freelance roles being cut<sup>24</sup> is very real in light of the cost of living crisis.

The number of cultural and creative freelancers in Wales may be even greater than previously thought (we estimated 8,500<sup>25</sup> back in 2020): we could be as many as 23,000 given estimates from Clwstwr.<sup>26</sup> The Welsh culture sector has grown larger than 2019 levels by a good 5% and yet freelancers are continuing to struggle, particularly in **Music or performing arts**.

As a snapshot of who works in the industry we can say that most cultural freelancers were based in South Wales and 1/5 lived in the Cardiff area, but the workforce could be found across Wales. Around 63% were based in towns and cities, but the remainder were based in rural locations. A typical cultural freelancer in 2023 was female, aged 35-64, white, and from a higher socio-economic background. One in four identified as disabled, d/Deaf and/or neurodivergent. 6% were from the Global Majority.

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<sup>22</sup> The Self-Employed Landscape Report 2022 (IPSE): <https://www.ipse.co.uk/policy/research/the-self-employed-landscape/self-employed-landscape-report-2022.html>

<sup>23</sup> Report update from Clwstwr: <http://www.clwstwr.org.uk/report-update-size-and-composition-creative-industries-wales-2022>

<sup>24</sup> Written evidence from Arts Council of Wales (September 2022): <https://business.senedd.wales/documents/s130508/Written%20evidence%20from%20Arts%20Council%20of%20Wales.pdf>

<sup>25</sup> See methodology notes in 'Road to Recovery?' (2022): <https://cfw.wales/recovery>

<sup>26</sup> Clwstwr Creative Industries Report No 1.3: [http://clwstwr.org.uk/sites/default/files/2023-09/Creative%20Industries%20Report%20No%201\\_3\\_Final.pdf](http://clwstwr.org.uk/sites/default/files/2023-09/Creative%20Industries%20Report%20No%201_3_Final.pdf)

57% worked in more than one sector within culture, with the majority working across **Music or performing arts, Visual arts, and Film, TV, video, radio and photography**. 69% were self-employed but many combined this with PAYE work to make ends meet. 51% would not be able to pay three months' worth of rent/mortgage and bills on their savings, painting a stark picture of precarity and financial worry.

60% of the work cultural freelancers in Wales do is work undertaken or commissioned within Wales. People expressed a desire for this number to go up, but struggled to find opportunities. Some highlighted that companies and organisations recruited from outside Wales or did not adequately advertise the work.

Women and non-binary freelancers still earned less than male cultural freelancers, just as Global Majority members were still likely to earn less than White freelancers. Those identifying as disabled, d/Deaf, and/or neurodiverse struggled with financial precarity as well as lack of understanding. Social class made a big difference: 31% of cultural freelancers came from working class backgrounds and struggled disproportionately to others in the sector. Freelancers in North Wales faced more financial hardships as well.

Finally Brexit has resulted in fewer opportunities, less work, large funding gaps, reputational damage, and more difficulties for cultural freelancers generally.

**Freelancers highlighted their main worries in this survey as:**

- **Growing older and experiencing ageism**
- **Financial precarity, a lack of security and lacking opportunities**
- **Needing networking and social support structures**
- **Lack of understanding of what freelancers need, how we operate, and how to best support us in the work environment**

Aside from the recommendations below we would like to highlight the sincere need in the sector for:

- Paid or fully funded Welsh learning for freelancers, delivered as flexibly as possible to allow for different learning styles and lifestyles
- Signposting resources where freelancers can find up-to-date, free or heavily subsidised help and advice
- More earmarked funding pots for working class freelancers across the board
- Continued efforts for organisations to undertake diversity and inclusivity training on multiple levels, including involving freelancers directly with this work

The landscape was not all bleak: 71% of freelancers wanted to stay in the industry. Global Majority freelancers were generally seeing an increase in work and felt even more positive about working in the sector. More freelancers were learning Welsh than ever before and 60% spoke some level of Welsh. There were rays of hope amongst the feedback we received, as well as a number of organisations people felt should be celebrated for their work with and for freelancers (see Appendix).

Below are our recommendations for immediate actions that can be taken by funding bodies, organisations, and freelancers themselves.

### **Recommendations for funding bodies**

1. Prioritise financial support for organisations that actually achieve best practice around freelancing
2. Give freelancers easy-to-use tools for reporting problematic behaviours they encounter
3. Set up dedicated funding to plug the gaps left by EU funding since Brexit

Freelancers want to be treated with dignity and respect – this should be reflected in funding portfolios. This is not limited to pay rates but must include factors such as transparent work practices, inclusivity, and communication. Freelancers must feel empowered to safely challenge and call out problematic behaviours they encounter in funded organisations. Notably these tools should be easy to use and not be an exercise in excessive bureaucracy.

The third recommendation is a big ask but the culture sector is crying out for the opportunities lost since Brexit: to instil hope in Wales would need to address this funding gap.

#### **Recommendations for organisations and networks**

1. Advertise freelance jobs widely and transparently within Wales
2. Commit to fair pay rates for all freelancers (Union rates or better)
3. Fund intergenerational practices between cultural freelancers

Freelancers noted that recruitment could be opaque and feel steeped in favouritism. Transparent recruitment is a vital part of a thriving, equitable job market. Advertising all freelance roles in multiple places, both online and offline, would be a good start.

Freelancers need to be paid better. We would like to see all organisations, big and small, working with freelancers commit to fair pay. This will vary between sectors but guidance does exist for many job roles and we would encourage these conversations happening with freelancers themselves, not decisions taken behind closed doors.

Thirdly freelancers need more intergenerational work to be inclusive and healthy: passing on skills, learning from one another, and letting freelancers of all ages work together will benefit the whole sector. This work must be paid, as freelancers cannot give their time and knowledge for nothing.

### **Recommendations for individual freelancers**

1. Raise your rates and have frank conversations around money
2. Seek out or create your own community
3. Consider joining a union

For fellow freelancers reading this report: be bold and value your skills highly. It is uncomfortable for many to speak about money or increase prices, but times are hard. Raise your rates, or discuss costs with clients and employers. Challenge calls for unpaid work: organisations like [Unlimited](#) have created resources for this.

We recommend you seek comfort, strength, and solidarity in one another. Many respondents expressed a desire for community or a feeling of isolation: this can be achieved. Form collectives, reach out online, co-work, nurture spaces where freelancers can meet. A supportive network cannot be handed out: it must be grown.

Our third recommendation is outside of some budgets but joining a trade union relevant to your freelance role can come with significant added value such as tailored advice, support at work, and the ability to influence sector conditions.

To get involved with the future development of our work as freelancers supporting freelancers, or to follow up on any of the findings of this work, please contact Cultural Freelancers Wales on [hello@cfw.wales](mailto:hello@cfw.wales)



# APPENDIX

## Organisations to celebrate

As part of our Freelance Check-In 2023 survey we asked freelancers to highlight organisations, groups and schemes in the Welsh culture sector that they felt were achieving best practice around the use and support of the freelance workforce.

Below is a list of the ones respondents felt deserved a shout out (in alphabetical order):

- Amgueddfa Cymru | National Museum Wales
- Anthem Wales
- Artes Mundi
- ArtHole
- Arts Care Gofal Celf
- Arts Council of Wales
- Arts for Health and Wellbeing (Cardiff & Vale Health Charity)
- Avant Cymru
- Awen Cultural Trust
- Bad Wolf
- Beastly Media
- Bectu
- Books Council of Wales - Cyngor Llyfrau Cymru
- Business Wales
- Calon FM community radio station
- Cardiff Animation Festival
- Cardiff Umbrella
- Chapter Arts Centre
- CHERISH
- Citrus Arts
- Common Wealth Theatre
- Dance Collective CIC
- Denbighshire Heritage Service
- Disability Arts Cymru
- Dyffryn Dyfodol
- Elysium Gallery & Studios
- Emerge Community Arts
- Equity
- The Federation of Museums and Art Galleries of Wales
- Ffilm Cymru

- Ffiwsar
- Hay Festival
- Head4Arts
- Hijinx Theatre
- The Hold Up Arts Collective
- Horizons Gorwelion
- Jac Lewis Foundation
- Leeway Productions
- Literature Wales
- Make It! Gwnewch e!
- Muslim Council of Wales
- National Union of Journalists
- Oasis One World Choir
- Omidaze Productions
- On Par Productions
- Oriel Davies
- Peak Cymru
- Pen and Paper Theatre
- PLANED
- Rabble Studio
- Radar Mag
- Ruthin Craft Centre
- Screen Alliance Wales
- ScreenSkills
- SHIFT
- Startup Stiwdio
- Tafwyl
- Taking Flight Theatre
- Tin Shed Theatre Co
- Theatr Gwaun
- Theatr Soar
- Tŷ Cerdd – Music Centre Wales
- Urban Circle Newport
- Urban Myth Films
- Urdd Cymoedd
- Vertical Dance Kate Lawrence
- Volcano Theatre Company
- WAHWN (Wales Arts Health & Wellbeing Network)
- Ways of Working Ltd
- Welsh National Opera | Opera Cenedlaethol Cymru
- Yeti Television (Yeti Media)

There are also many mentions of individual culture workers worthy of praise, as well as lamentation over organisations and groups that have winked out of existence or

lost funding over the years (e.g. Community Dance Wales, Minty's Gig Guide, GALWAD, and Shared Spaces / Business in Focus).

The above organisations are not connected to this survey, they were mentioned by freelancers across the sector in recognition of their work.