



**NETFLIX  
IN WALES**





Netflix has been in the UK for twelve years, and we're proud to have made a home here - it's our second biggest production hub globally and we have invested over \$6 billion into the UK creative sector in the years since 2020, including an increasing number of productions in Wales.

The opportunities in Wales for film and TV production are endless. Working alongside local creative talent, and with the Welsh Government via Creative Wales, we have partnered with production companies on titles including four seasons of Sex Education and our upcoming film HAVOC, which is the largest feature film ever shot entirely in Wales.



**These productions generate significant benefits for Welsh creatives, communities and businesses, but they also provide an opportunity to showcase Welsh culture and talent to the world.**

**OVER £200  
MILLION  
CONTRIBUTED TO  
UK ECONOMY**

*"From Sex Education to The Crown, and now to HAVOC, some of our most beloved titles were filmed or produced in Wales. Blessed with incredible creative talent and beautiful natural landscapes, Wales is an amazing place to make entertainment, so Netflix is delighted that our Welsh productions can continue to create such enduring cultural and economic opportunities."*

**Anna Mallett, VP Production, UK, Netflix**



*“This report demonstrates just how much of an impact major streaming services, like Netflix, can make when they invest in the UK’s nations and regions. Wales has so much to offer in terms of world-class infrastructure, talent, filming locations and a generation of young creatives who are looking to break into the industry.*

*Creative Wales is proud to be working closely with Netflix to help bring major productions to Wales. These collaborations create jobs, training opportunities and major spend within our economy and are a global platform to showcase everything we offer as a nation. We look forward to working in partnership with Netflix for many years to come to help Wales realise its full potential as a filming destination for major local and international productions.”*

**Joedi Langley, Interim Head of Creative Wales**

*“We are immensely proud of our Welsh creative industries, which employs over 35,000 talented individuals, and the world-class infrastructure we have in place for film and tv productions. Welcoming high-profile Netflix productions to Wales, as this report demonstrates, has delivered significant economic and reputational benefits. Our support, through Creative Wales, of productions like Sex Education and Havoc has secured invaluable further training opportunities for the sector.”*

**Jack Sargeant, Culture Minister**

*‘It was such an exciting prospect to make a film such as HAVOC in Wales. Seeing the impact that productions of its scope can have on local businesses while showcasing the creative talent here has been incredible. I hope that what we have achieved with this film will go some way towards seeing many more filmmakers continue to choose Wales as the place to tell their story.’*

**Gareth Evans, Director, Havoc**

## JUST SOME OF NETFLIX’S PRODUCTIONS IN WALES



### THE ONE

Sully, Swansea, Newport, Penarth and Cardiff

### SEX EDUCATION

Tintern, Symonds Yat in the Wye Valley, Monmouth and Llandogo

### YOU VS WILD

Porthmadog

### THE END OF THE F\*\*\*ING WORLD SEASON 2

Bay Studios (Swansea), Cardiff Central Police Station, Swansea Council building, Neath Port Talbot, Pendergry

### THE WITCHER

Nash Point Llantwit, Tredegar

### LADY CHATTERLEY’S LOVER

Wrexham

### HAVOC

Cardiff, Swansea, Bridgend, inc. Great Point Studios and Dragon Studios

### THE CROWN

Aberystwyth, Caernarfon Castle



## Economic impact

As well as getting to show off the best of Welsh creative talent and locations, these productions drive real benefits for the economy. In fact, including HAVOC, our productions in Wales have now contributed **over £200 million in GVA to the UK economy.**

This economic boost is not only felt by those working on set. Producing a film or TV series typically draws on a wide range of personnel, skills, services, facilities and infrastructure, so a ripple effect is felt across the economy:



Beyond direct spending, Netflix productions also create a multiplier effect, benefiting businesses that supply goods and services to the industry.

**For every £1 spent by Netflix in Wales, an additional 80p is generated in spending across the supply chain.**

**For every £1  
Netflix spends  
on productions  
in Wales:**

**58p**

**is spent in the TV  
and film sectors**

**7p**

**is spent in rental  
and leasing**

**5p**

**is spent in wider  
creative and arts  
sector**

**3p**

**is spent in food  
and hospitality**

**27p**

**is spent across  
other sectors of  
the economy**

# Supporting Welsh businesses and talent

## Local businesses

Netflix's investment in Welsh productions has created significant opportunities for local suppliers. **Nearly 500 Welsh businesses**, from all over the nation, have benefited from production in Wales, helping to sustain and grow businesses in various sectors.



*Adam Charles, Head Chef, The Healthy Hangout, Cardiff 'I love that Netflix used local suppliers for this kind of thing. We provided the meals for some of the stars of the movie, which was great. Obviously it is really good for our business and our bottom line, but so much goes into our work, so there is also a sense of pride in knowing that our produce played a part in a big production like this.'*

## Supporting local Welsh talent

These productions can also often provide valuable training opportunities for the next generation of talent. For example, during the production of Sex Education which was supported by the Welsh Government via Creative Wales, **over 60 trainee and apprenticeship roles were created**, with many returning as full-time crew in subsequent series.

In addition to this, **Netflix and the National Youth Theatre's 'IGNITE Your Creativity'** programme has helped over 350 young people in workshops held across Newport, Cardiff, Port Talbot, Torfaen and Bridgend, designed to build their confidence and networks ahead of a career in creative industries.



*Johnny Gurnett: 'I worked as a floor runner in the Assistant Director department on Sex Education season three. Getting your foot in the door can be really difficult, so as my very first job in the industry, it was such an incredible opportunity for me. Since then I have been lucky enough to work on Disney's Willow, BBC's Lost Boys and Fairies and HBO's Rain Dogs. I wouldn't be where I am today if it was not for the experience and relationships I gained working with Netflix on Sex Education.'*

# Spotlighting Welsh Culture

## Championing Welsh language content

With content from around the world and with members in 190 countries, Netflix is a place where people can see themselves reflected on screen, as well as experience stories from other cultures, including Wales.

For example, in season 3 of *The Crown*, Episode 6 (*Tywysog Cymru*) is almost entirely in Welsh, as the Prince, portrayed by actor Josh O'Connor, travels to Aberystwyth to learn the language.

In 2023, Netflix also licensed its first Welsh-language title, *Dal y Mellt*, showcasing the Cymraeg to millions outside of Wales. Similarly, members will be able to watch *HAVOC* with Welsh-language subtitles, a feature that was also provided for *The Adam Project* and *Red Notice*, the hit action films featuring Ryan Reynolds.



## Appreciating the Welsh way of life

Some Welsh productions show off Wales and Welsh talent to the world. But they also often bring the world to Wales, allowing some of the biggest stars to experience and promote the joys of Cymru first hand.

While filming *HAVOC*, Tom Hardy was spotted enjoying the amusement park on Barry Island, and popped into the local supermarket in Cardiff.

Similarly, co-star and Academy Award winner, **Forest Whitaker posted a picture of Tenby Castle, with the caption 'Enjoying time in beautiful Wales before going back to set.'**





# NETFLIX IN WALES

## FEATURING

THE END OF THE F\*\*\*ING WORLD

THE WITCHER

SEX EDUCATION

LADY CHATTERLEY'S LOVER

THE CROWN

HAVOC

the  
**une**

←**YOU** vs **WILD**→

