Film Hub Wales
Canolfan Ffilm Cymru

wavehill™
social and economic research
ymchwil cymdeithasol ac economaidd

Made in Wales

With funds from Clwstwr, Film Hub Wales commissioned Wavehill to research how to increase engagement with films that have a Welsh Connection. The overall aims were to:

- Promote Welsh film
- Increase audience engagement
- Develop the sector in Wales

December 2020.

Image © Youngun / Alex Melhuish (2018)

Image © Anorac / Boom Cymru (2019)

01 Benefits of a Strong Welsh Screen Sector

The creative industries is one of Wales' fastest growing sectors:

58,000 People employed

£1.9bn Annual turnover

52% More employees than 10 years ago

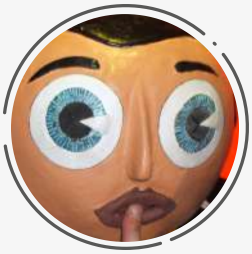
Economic Outcomes

- Inward investment for Wales,
- Greater recognition for Wales internationally leading to economic benefits,
- Employment for individuals involved within production, exhibition and distribution.

Cultural Outcomes

- A more culturally self-confident Wales,
- Greater recognition for Wales internationally,
- Greater platform for Welsh stories to be told,
- More recognition for Welsh talent internationally.

Image © Being Frank: The Chris Sievey Story / Altitude Films (2019)



The Research

02

To explore how increased engagement with films with a Welsh connection could support the Welsh screen sector, Film Hub Wales commissioned Wavehill to explore how awareness of Welsh screen content might be increased and how this message could be delivered to digital generations and support the Welsh screen sector. The research has explored barriers to exhibiting films with a Welsh connection, the support available to promote films with a Welsh connection, and how cinema exhibition has been supported in other countries.

Image © Britannia / Joanna Quinn (1993)

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Strengths

During this research, we consulted with sector stakeholders to understand the strengths of the Welsh screen sector and the barriers that prevent greater engagement with Welsh films.

- Wales' strong tradition of storytelling and strong cultural identities
- The strength of the animation sector
- Skills base of the industry including crossover with the television sector (S4C, BBC Cymru Wales)

> ***Welsh film exhibition development and marketing support is vital to ensure that the talent and voices of Welsh film makers are heard.***

Image © Canaries (2017)

Barriers

04

Structural

- Confusion about where responsibilities lie for supporting Welsh Film,
- Lack of a joined-up approach between these agencies (and Welsh Government),
- Lack of focus on cinema within Welsh film strategy,
- Lack of Welsh distributors,
- Lack of large-scale film festivals (compared to other UK / international examples) that screen established Welsh films and attract investment for Wales.

Exposure / Perceptions

- Need for Welsh language content,
- The accessibility of content,
- Lack of clear Welsh film identity / brand to promote it, including focus within distribution materials,
- Perceived film quality (audiences may not know of a Welsh connection).

Market Supply / Behaviours

- Distributors dictating terms to exhibitors: e.g. how long the run has to be,
- Understanding the potential value of Welsh films among distributors,
- Films not always accessible in formats that support community venues,
- Competition from mainstream films.

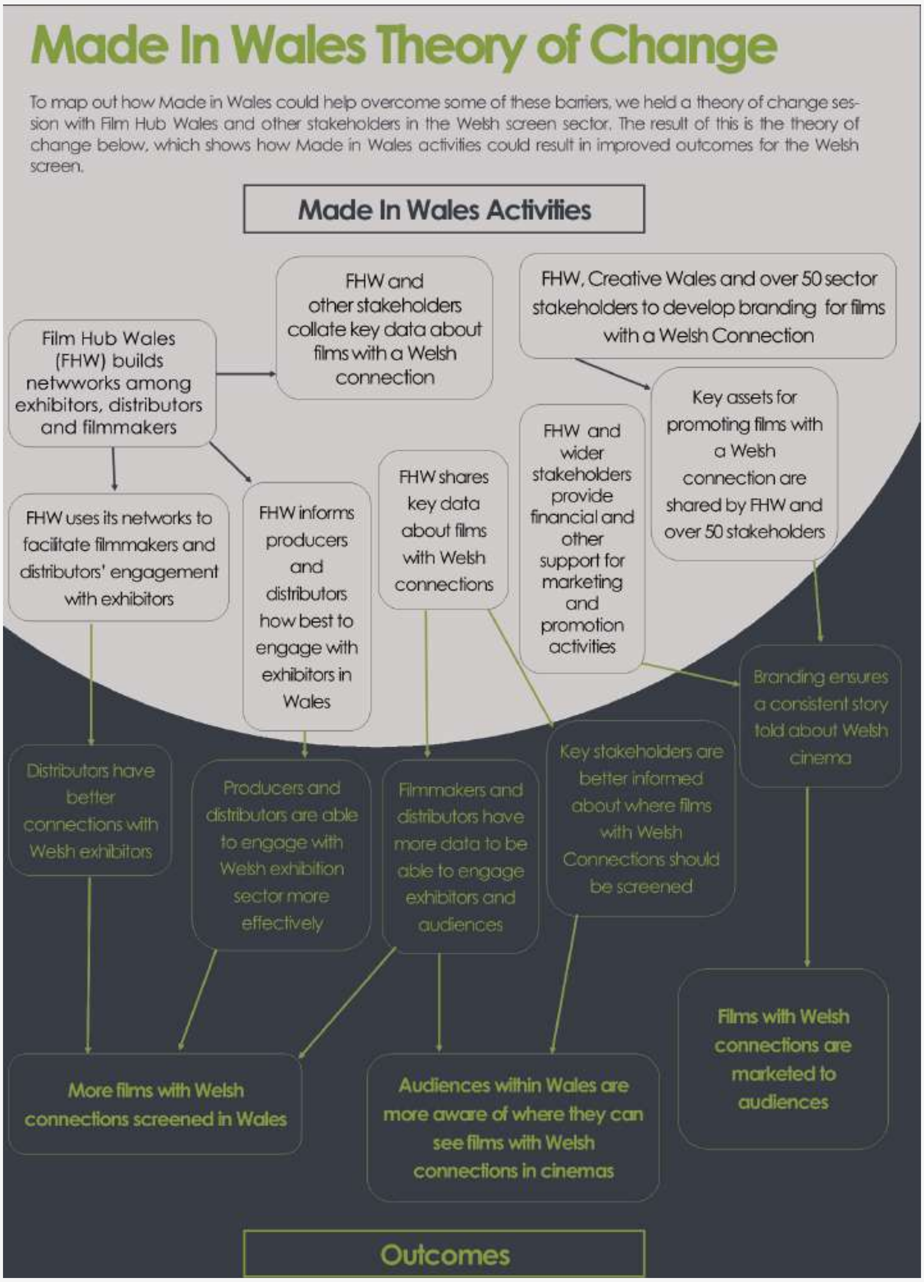
Knowledge / Data Gaps

- Distributors lacking contacts in the exhibition sector,
- Knowing how early in a film's lifetime exhibitors have to be engaged,
- Knowing where films with a Welsh connection will be shown,
- Benchmarking to understand performance of films with a Welsh connection,
- Sharing information with partners.

Image © Creepy Pasta Salad (2020)

05 Theory of Change

To map out how Made in Wales could help overcome some of these barriers, we held a theory of change session with Film Hub Wales and other stakeholders in the Welsh screen sector. The result of this is the theory of change below, which shows how Made in Wales activities could result in improved outcomes for the Welsh screen.



Survey Feedback

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Identity

We consulted stakeholders about their views on Welsh film identity. Overall, stakeholders are not sure that there is a strong film identity, but those that do identified 'language' and 'landscape' as its main assets.

A Joined up approach

Stakeholders reported that a more joined-up, centralised approach to supporting Welsh film is needed. Although there is lots of activity and goodwill within the Welsh film industry, at times there can be confusion about where responsibilities lie.

A Welsh film brand

64% support the idea*

31% undecided on the idea*

5% did not support the idea*

A Made in Wales brand needs to mean something for people to be proud of. It needs shouting from the rooftops, covering in every venue guide, with uniform graphics so people know what to watch for.

An umbrella campaign that supports Welsh film will secure additional funding opportunities, greater connectivity, marketing capacity, and ultimately develop greater awareness for existing and new audiences.

Recent Welsh titles such as Gwen and Mr. Jones have been very successful: the Welsh elements have been essential in drawing these large crowds out to the cinema.

*Based on responses from 39 stakeholders.

07

Welsh Identity - What stakeholders said:

Image © Gwen / Bulldog Film Distribution (2019) | Stars in your Eyes / Adelphi Films (1956)

Case Studies:

To support development of the screen industry in Wales, we have explored some international examples of good practice.

08

Sweden:

- Screen support is provided by the Swedish Film Institute (SFI), which is funded by the government, as well as a levy on cinema admissions and contributions from sector stakeholders.
- The SFI supports films from production through to distribution and exhibition. From 2015, all Swedish feature-length films that have received production funding are also eligible for launch funding.
- The SFI has an international department, which maximises exposure of Swedish films via festivals, markets and events. It also produces Swedish Film, a magazine to promote Swedish films to an international audience.
- They publish sector data annually, including both cultural and economic indicators.
- The SFI also supports grants to support accessible formats for around 50 films every year.

Ireland:

- The main agency supporting cinema in Ireland is Screen Ireland, which supports films from production through to distribution and exhibition.
- All films funded through Screen Ireland receive mentoring to support their sales and distribution strategy and all are eligible for distribution support.
- Screen Ireland provides loans of up to 90% (up to €75,000) of promotional costs for Irish films and direct distribution loans of up to 80% (up to €15,000) for smaller films, recouped through box office receipts.
- Screen Ireland are working with Usheru on their Home for Film platform to promote Irish films internationally.
- Access Cinema provides support to community cinema venues, booking packages of films for them and supporting them to request funding from the Arts Council to upgrade their facilities.
- Domestic insight data is available on Screen Ireland's website, including top performing films and market share.

Canada:

- At a national level in Canada, support for film is provided by Telefilm Canada (TC). TC aims to promote Canadian talent, support industry development, and secure funding for the industry.
- TC supports around 90 films per year, all of which are eligible for support with distribution and exhibition.
- TC works with the Toronto International Film Festival (TIFF) to promote Film Circuit, which aims to bring the best of Canadian and international cinema to audiences across Canada.
- Internationally, TC supports Canada Now, an initiative they run with the Canadian Government to promote Canadian films in Canadian Government priority export markets.
- TC hosts Seeitall, a service which lets users find out where they can see Canadian films online or in cinemas.
- **TC require closed-captioned versions (English / French) for all films they support and 'Talent Fund' projects must also include an audio described version.**
- Domestic and international insight data is available **on TC's website, including a success index which includes commercial, cultural and industrial factors.**

What Wales can learn from these examples*:

- All of these examples integrate distribution and exhibition support within the support they provide for production, supporting films all the way through their journey to the screen.
- Providing films which receive production finance with additional support for distribution and exhibition maximises the impact of state investment in production and skills.
- The lack of Wales-based distributors is a challenge for the sector, something which is compounded by the lack of marketing and distribution databases which are available in other territories.
- Information services, allowing audiences to find out about where they can see films would be relatively cheap to deliver, and help inform audiences about where they can see films with a Welsh connection.
- International film promotion is usually closely aligned to a territory's strategic export priorities.
- Collating and publishing data about the financial performance and cultural reach of Welsh films would help screen support agencies to understand how well its screen sector is doing, and how it can best be supported in the future.

There are wider support services available to Welsh screen via the BFI, the leading body for UK film and collaborative strategic approaches through the BFI's national strategy. For the purpose of this report, the focus is on Wales based services.

Image © Queerama / Young Soul Rebels - ie ie Productions (2017)

Image © The Proud Valley / Studiocanal (1940)

09 Next Steps - What the research found:

There are both cultural and economic reasons why greater engagement with Welsh film can be beneficial to Wales:

Film Tourism **Inward investment** **Cultural confidence** **Talent recognition**

Recommendations:

1. An integrated Welsh film strategy that includes a role for exhibition and distribution.

Film Hub Wales and other stakeholders (e.g. Ffilm Cymru Wales, Creative Wales, UK distributors etc) should work together to develop a more integrated screen strategy for Wales, which recognises the importance of supporting exhibition and distribution, as well as investment in skills that support film production. Doing more to support the visibility of Welsh films will overcome some of the challenges facing the Welsh screen sector and lead to longer-term cultural outcomes.

2. Developing an information service:

To support exhibition, Film Hub Wales and stakeholders should collate, analyse and share data where possible, working in partnership with bodies such as Comscore and the Film Distributors Association. A benchmark for Welsh film could be used to monitor performance and improve evaluation strategy.

3. Explore Welsh identity

Film Hub Wales should engage with other key stakeholders to establish a commonly agreed Welsh film identity as the basis for a Welsh film brand. While sector stakeholders are broadly supportive of the idea, representations should be made to Welsh Government to ensure that it is consistent with Welsh Government's new Creative Wales initiative.

Any future brand development should be consistent with the themes underpinning other branding initiatives in Wales, including a focus on Welsh history, landscape and the diverse communities living in Wales in 2020. Such a brand is likely to require significant financial investment along with buy in from distribution and other stakeholders, to have cut-through and an impactful implementation, so that Welsh film can reach domestic and international markets more extensively (including through film festivals).

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