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Scoping the potential for a 'Made in Wales' initiative to support the Welsh screen industry

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List of abbreviations

ACE	ACE PRODUCERS, a network of independent cinema producers
BAFTA	British Academy of Film and Television Arts
BAFTA Cymru	British Academy of Film and Television Arts in Wales
BBC	British Broadcasting Corporation
BFI	British Film Institute
BFI FAN	British Film Institute Film Audience Network
CRM	Customer relationship management
DCP	Digital Cinema Package
EFP	European Film Promotion network
FHW	Film Hub Wales
GVA	Gross Value Added
HE	Higher Education
IDFA	International Documentary Film Festival Amsterdam
IFB	Bord Scannán na hÉireann/the Irish Film Board
ITV	Independent Television network
MiW	Made in Wales
SI	Screen Ireland
SFI	Swedish Film Institute
S4C	Sianel Pedwar Cymru
TIFF	Toronto International Film Festival
TC	Telefilm Canada
ToC	Theory of Change

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Executive Summary

This executive summary outlines the main findings of an independent research study carried out by Wavehill. This research was commissioned by Film Hub Wales (FHW), with the support of funding from Clwstwr, to explore how awareness of Welsh screen content might be increased and how this message can be delivered to digital generations. To this end, the research has explored barriers to exhibiting films with a Welsh connection, and the support available to those within the sector that wish to promote these films, as well as how cinema exhibition has been supported in other countries.

The research has sought to understand how FHW's 'Made in Wales' activities have supported films with a Welsh connection with a view towards understanding whether developing these activities into a more coherent brand for Welsh cinema content would add value to existing efforts to promote Welsh film, increase audience engagement and develop the sector in Wales.

Methodology

To deliver this project, five main research activities were planned, four of which were carried out:

1. Stakeholder interviews with 12 stakeholders within the Welsh screen sector and organisations supporting distribution elsewhere in the UK (including the BFI, Ffilm Cymru Wales, Into Film Cymru, Welsh Government, Visit Wales, the Iris Prize LGBT+ Film Festival, Pontio, Northern Ireland Screen, Creative Scotland, Bulldog Film Distribution).

2. An online survey of sector stakeholders. The survey was distributed through FHW's network of exhibitors, distributors, producers, developers, training providers and other sector stakeholders (including BAFTA Cymru, Screen Alliance Wales, Wales Screen, and broadcasters including BBC Wales, ITV Wales and S4C), generating 56 responses.

3. A theory of change workshop session with stakeholders in the Welsh screen sector to explore how to achieve the goal of 'raising awareness of Welsh screen content and delivering it to digital generations' and the extent to which Made in Wales activities can deliver on this goal.

4. Desk-based research to explore how Wales has been branded elsewhere, the extent to which Welsh cinema has a coherent identity and how other countries have supported exhibition as part of an integrated strategy for their screen sectors.

5. Pontio Arts and Innovation Centre, in collaboration with Bangor University, were commissioned to undertake focus groups measuring implicit brand attributes and perception with public audiences. This element of the research was unable to be completed due to the Covid-19 pandemic. Audience facing research was otherwise beyond the scope of this brief and will be considered in any future research stages.

The challenge

The creative industries is one of Wales' fastest growing sectors, with an annual turnover of over £1.9 billion and employing over 58,000 people, 52% more than ten years ago.[1] Welsh screen industries has grown more rapidly than cinema elsewhere in the UK, with Welsh GVA in this area growing from 0.9% of the UK total in 2007 to 1.6% of the UK total by 2017.[2]

The success of the Welsh screen sector is important to Wales because it has the potential to drive a number of economic and cultural outcomes for the country as outlined in table 1, below.

Table 1: Benefits deriving from a strong Welsh screen sector

Economic Outcomes:	Cultural Outcomes:
• Inward investment for Wales • Greater recognition for Wales internationally, leading to economic benefits (e.g. film tourism) • Employment for individuals involved within production, exhibition and distribution	• A more culturally self-confident Wales • Greater recognition for Wales internationally (soft power/cultural clout) • A greater platform for Welsh stories to be told • More recognition for Welsh talent internationally

At the same time, there is a perception among some stakeholders that the sector has 'stalled' slightly, potentially owing to a lack of a coherent film strategy in Wales.[3] As evidenced by a consultation carried out in 2019 and the introduction of the new Creative Wales agency within Welsh Government, there is some recognition of the need to provide greater support to the industry.[4] Some stakeholders, including FHW perceive that most efforts to provide greater strategic direction to the sector have focused on skills development and not ways to increase the visibility of Welsh films.

In order to explore how Made in Wales could potentially contribute to film strategy in Wales, the strengths of the Welsh screen sector and barriers to its growth were explored. According to stakeholders engaged during this research, the strengths of the Welsh film industry include:

- The skills base of the industry, including the crossover with the television sector through S4C and BBC drama relocated to Cardiff
- The strength of the animation sector
- Wales' strong tradition of storytelling and strong cultural identities.

[1] https://tradeandinvest.wales/key-industries/creative-industries
[2] https://seneddresearch.blog/2019/07/08/lights-cameraaction-screen-industries-await-the-creation-of-creative-wales/
[3] https://www.bbc.co.uk/news/uk-wales-48286863
https://senedd.wales/laid%20documents/cr-ld12524/cr-ld12524-e.pdf
[4] https://www.wales.com/creative-wales

Barriers to visibility for Welsh film reported by stakeholders during this research can be grouped into three categories:

- demand (i.e. are audiences interested in Welsh film in comparison to blockbuster films)
- supply (i.e. the quality of Welsh film)
- structural (i.e. the support available to produce and promote quality Welsh film).

These challenges are circular and suggest that better support could lead to a better offer and awareness, in turn increasing demand for films with a Welsh connection.

Made in Wales theory of change

To understand how Made in Wales activities fit in with other support for the Welsh screen sector and inform subsequent research activities, a theory of change was developed for Made in Wales. Based on stakeholder interviews and a theory of change workshop carried out with staff at FHW and key partner organisations, the theory of change explores how Made in Wales activities could – in conjunction with other initiatives – help to overcome the visibility gaps for Welsh cinema content and contribute to the overall objectives of growing the Welsh screen sector.

The theory of change is best thought of as a 'best case scenario' of what could happen if Made in Wales activities are carried out. At this stage, no judgement is being made on the suitability of the activities carried out or the likelihood that a Made in Wales strategy would be successful in achieving its goals. The full theory of change is included in the main report, but this executive summary provides a brief overview of its main features.

Barriers to visibility

Reflecting the objectives of Made in Wales, the theory of change process identified barriers currently preventing more people from engaging with Welsh cinema content. A particular focus for this conversation was the barriers that might prevent audiences engaging with this content in an exhibition setting (i.e. at a public screening). These were discussed along with additional barriers identified during scoping interviews carried out prior to the workshop. These barriers have been grouped thematically below.

Structural/strategic barriers:

- The lack of a joined-up approach between agencies supporting the Welsh film sector and, at times, Welsh Government
- The relative lack of focus on exhibition within Welsh cinema strategy.

Exposure and perceptions:

- The perception, perhaps erroneous, that Welsh cinema lacks quality
- Lack of Welsh language content
- Accessibility of content (e.g. subtitling)
- Screen capacity, particularly for independent cinemas
- Lack of clear, decipherable Welsh film identity and a brand to promote it.

Market Supply Behaviour:

- Distributors dictating terms to exhibitors: e.g. how long the run has to be
- Lack of appreciation/understanding the potential value of Welsh films among distributors
- Films not always being made accessible in formats that support community venues (i.e. DCP v. DVD)
- Competition from more mainstream ‘Hollywood’ films.

Knowledge deficits:

- Distributors lacking contacts within the Welsh exhibition sector
- Some within the production sector do not know how early in a film’s lifetime exhibitors have to be engaged
- Stakeholders are informed of Welsh films late in the process, thus limiting the opportunity for marketing and exhibition
- Individuals and stakeholder organisations not knowing where films with a Welsh connection will be shown.

Data gaps:

- Lack of benchmarks to understand performance of films with a Welsh connection within and outside Wales
- Information not being shared between different partners.

How Made in Wales can overcome these barriers

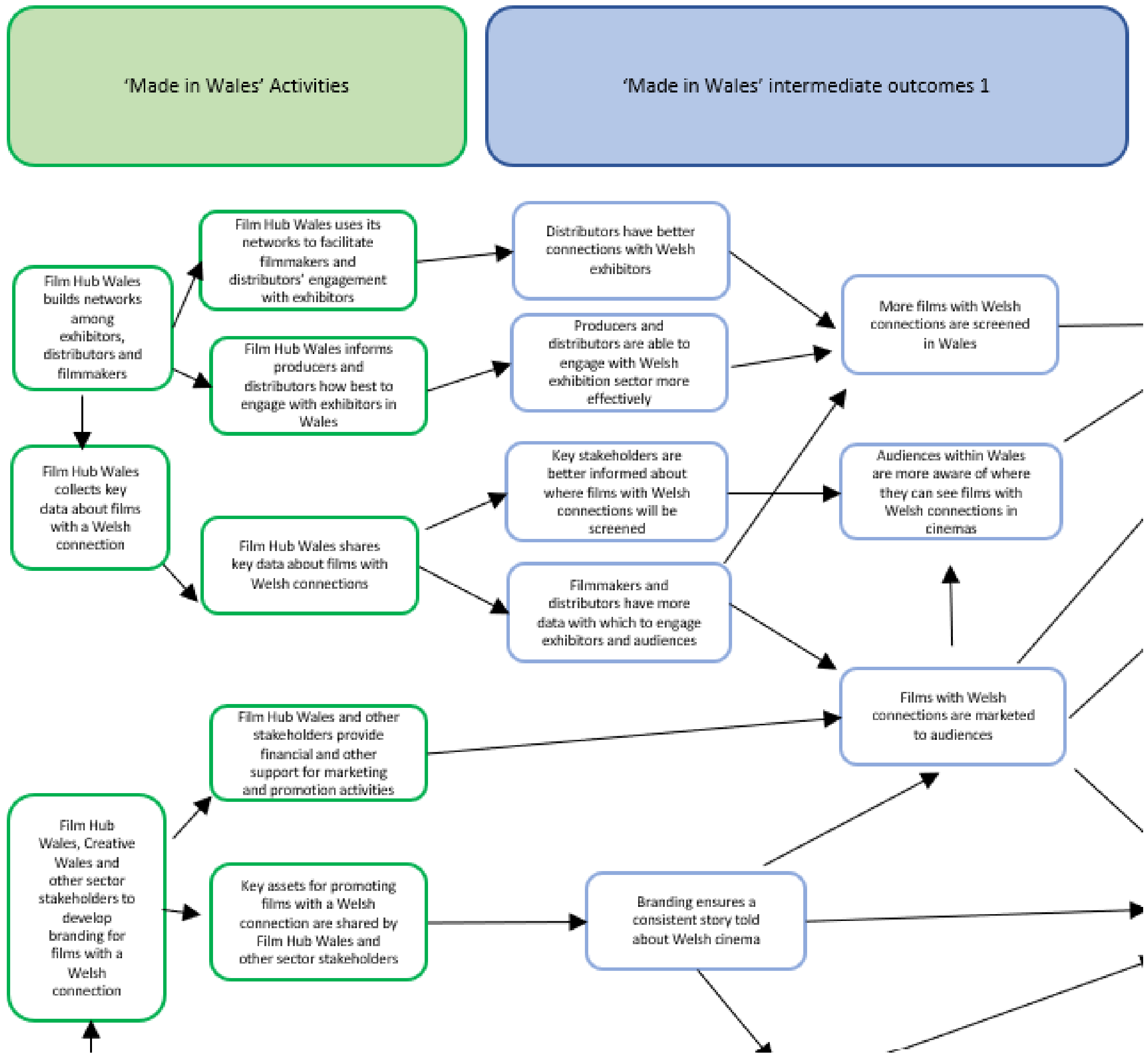
The theory of change workshop also explored how Made in Wales activities could help to overcome these barriers. These activities were identified as followed:

- Networking and ensuring better engagement between producers, distributors and exhibitors within the Welsh film industry
- Collecting and sharing key data
- Supporting the marketing and promotion of films with a Welsh connection
- Working with sector partners to ensure that exhibition is better represented within Welsh film strategy.

These Made in Wales activities have been linked to anticipated outcomes resulting from them in the graphic below. Green boxes indicate actions taken by FHW (either independently or in conjunction with partners) and blue boxes indicate outcomes resulting from activities.

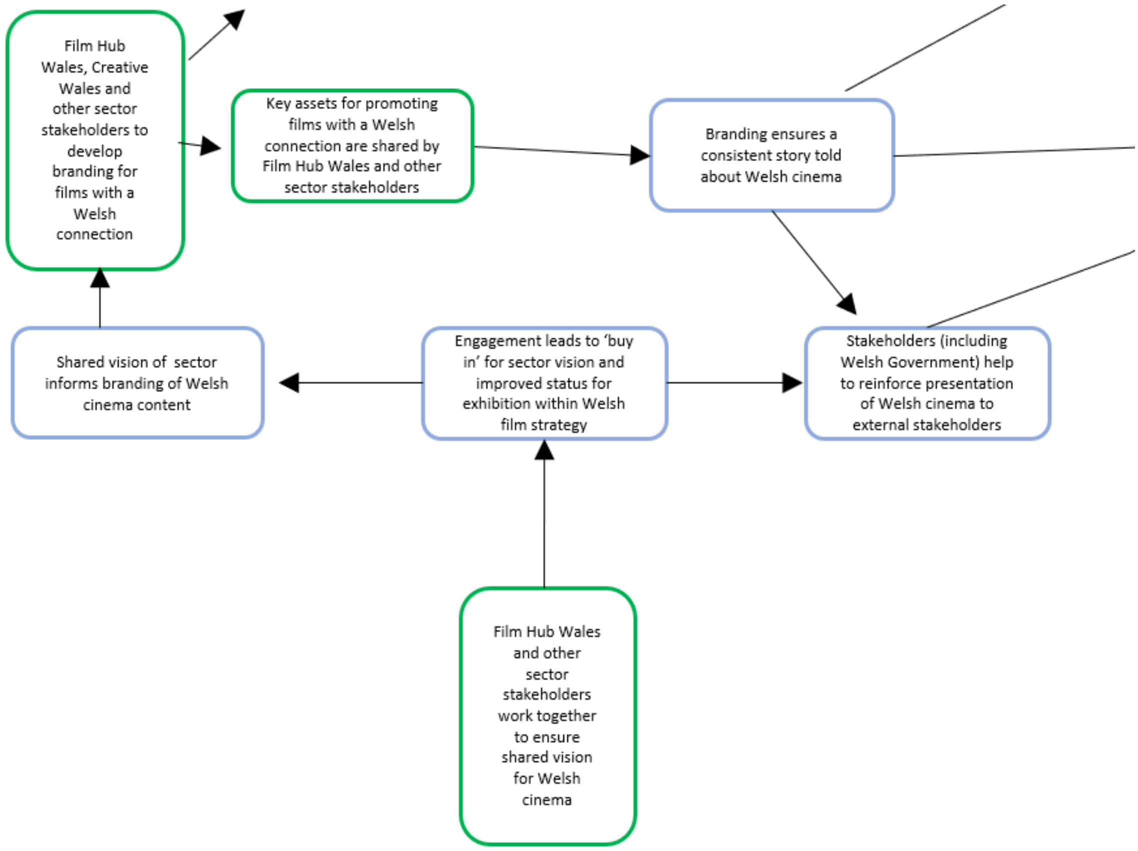
These are relatively short-term outcomes, resulting directly from Made in Wales activities, leading to more films with Welsh connections being screened in Wales, audiences in Wales becoming more aware of where they can see films with Welsh connections in cinemas, and films with Welsh connections being marketed to audiences, and a sense of brand identity ensuring that a coherent, consistent story is being told about Welsh cinema.

Figure 1: Made in Wales activities and outcomes anticipated to result from them



It is important to note, however, that Made in Wales activities require buy in and engagement from other stakeholders to ensure that there is a shared understanding of the strategy for the Welsh screen sector and the role of exhibition within this strategy. Most immediately, engagement has the potential to raise the profile for the exhibition sector within Welsh film strategy. This engagement with other stakeholders has the potential to underpin the branding of Welsh cinema content, and inform the way that external stakeholders such as Welsh Government tell the story of Welsh cinema and present it to others outside the Welsh film sector.

Figure 2: Made in Wales activities and their relationship to other sector stakeholders



Branding Welsh cinema

As the previous section outlines, one of the proposed Made in Wales activities is to develop a brand for Welsh cinema, supporting the marketing and promotion of films with a Welsh connection. In light of this, the research has examined how Made in Wales might do this, exploring how Made in Wales would fit in with existing attempts to brand Wales and the resources that the Welsh film industry can draw on to brand Welsh cinema.

Existing attempts to brand Wales

Whereas the classical brand model is owned by the company responsible for branding it (e.g. Halen Môn or Penderyn), the place brand is something managed (usually by a public organisation) on behalf of a sector or a whole region. In this context, the organisation managing the brand must be sensitive to the way that organisations operating in the same space use the brand. Wales is already branded in many ways, all of which will potentially affect a 'Made in Wales' brand employed by Film Hub Wales. Most notable among these are the Welsh Government's place branding strategy, and there would be value in ensuring that Made in Wales is aligned with these initiatives and Creative Wales' efforts to promote Welsh creative industries.

It is also important to acknowledge that the phrase 'Made in Wales' is already being used by other organisations, and similar straplines (such as 'Cnwd Cymru/ Wales Made', which has been adopted in a new Business Wales initiative to promote products manufactured in Wales internationally) are being used elsewhere, something that could potentially lead to confusion between these activities and a Made in Wales brand.

Branding Welsh film

The survey of sector stakeholders carried out during this research suggested that within the sector, there is not a particularly strong idea of a Welsh film identity, and not all associations are positive, with 'low budget' being the word or phrase most commonly associated with Welsh film. More positively, stakeholders reported that Welsh film identity brings together films with indigenous performers (actors) and talent (film makers), Welsh stories (myths and histories and fictions) as well as visuals (landscape/historical sites/effects companies/visual art), and texts – in both Welsh and English. Unlike some other countries, there isn't a particular genre or type of film associated with the Welsh film identity in the same manner that one would, for example, associate 'Nordic noir' to a Scandinavian film identity.

The stakeholder survey indicates general support for a branding initiative for Welsh film, although this support was not overwhelming. Some stakeholders suggested the need for any such initiative to be well integrated with Welsh film strategy, potentially involving the activities of Ffilm Cymru and/or Creative Wales. Most stakeholders reported being satisfied with 'Made in Wales' as a strapline for a Welsh film brand, although some suggested there were potential overlaps with some of the activities discussed in the previous section.

International exemplars

This study has also explored three case studies of other countries' film strategies, specifically Ireland, Sweden and Canada. These countries were chosen as case studies because they provide examples of how screen sectors have supported exhibition as part of a wider support package for film in these countries.

Each exemplar provides three overarching support packages:

1. Funding for each stage of the film development process (development, production, and distribution)
2. A package to promote the sector both domestically and internationally
3. An information service.

Whilst each exemplar is different and has slightly different emphases, the core aspects of their operation are the same.

All three case studies reveal a focus on supporting domestic talent and companies whilst also promoting co-production to attract talent from abroad to improve and diversify their industry. There are elements of targeted support in each country too, specifically to address gender inequality across each country, but also to ensure representation of indigenous groups in Canada. Each country appears to view their cultural impact as of equal importance to their economic impact, including making the most of the assets provided by indigenous languages.

One important aspect of the international promotion undertaken by each exemplar is to exhibit their product at international festivals and film markets. Some of these countries have built good relationships with world-leading festivals in order to ensure at least one film per year is selected to feature at these festivals. Screen Ireland and the Swedish Film Institute provide a directory of various international movie markets and/or a directory of their distributors on their website as a simple way of supporting distribution of their indigenous films. Telefilm Canada, on the other hand, advertises directories on its website for Canada-based production companies as well as contact details and information about previous co-production projects in order to boost their production activity. Together, these exemplars may provide important learning that can help to inform future support provided in Wales.

It is important to note, however, that these initiatives are aided by a considerably larger investment in supporting their screen sectors than is currently being invested in Wales.

Conclusions and recommendations

Reflecting the barriers to increased engagement with films with a Welsh connection, this report concludes that there is a case for developing FHW's Made in Wales activities further, with a focus on the following:

- Networking and ensuring better engagement between different parts of the film industry
- Collecting and sharing key data
- Supporting the marketing and promotion of films with a Welsh connection
- Working with sector partners to ensure that exhibition is better represented within Welsh film strategy.

As evidenced by the case studies summarised above, increasing engagement with film is most effective in the context of a holistic strategy for supporting a country's film industry, with investment in skills and production being reinforced by support for distribution and exhibition. This is something that Wales should also consider, but this would require considerable cross-organisation collaboration and involvement from Welsh Government.

Recommendation 1: The findings of this report should be shared with key stakeholders to inform ongoing discussions about how to develop an integrated Welsh film strategy that includes a role for exhibition.

It was widely acknowledged in stakeholder interviews that, at times, support for Welsh film can seem like a crowded field and that a more joined-up approach could be more productive. Successful implementation of this strategy would require clearly defined roles and responsibilities for agencies delivering it.

Recommendation 2: The development of a more integrated screen strategy for Wales, recognising the importance of investment in production, distribution and exhibition would potentially overcome some of the challenges facing the Welsh screen sector.

Once key stakeholders are agreed upon the contents of the strategy, there should be a formal and agreed framework for relevant stakeholders to operate within. Stakeholders should have clearly designated (and complementary) roles and responsibilities. Consideration should also be given to simplifying the way that support is presented externally, potentially through a public-facing umbrella initiative.

There is a need for stakeholders to work together to identify and share the data that would allow for a benchmark to be created for Welsh film and performance to be monitored.

Recommendation 3: Data needs to be collected to create a benchmark for Welsh film and undertake ongoing monitoring of performance. This should form part of the support package going forward with one organisation assigned the responsibility of doing so. It is first important to identify what data already exists and enquiries should be made to central bodies such as Comscore, BFI, Film Cymru and the Arts Council of Wales to that effect. If it is determined that insufficient data is held centrally, and given that we know only a small proportion of exhibitors collect the data, this will require a coordinated response to encourage more exhibitors to collect that data on their CRM system and establish a process for sharing with a central data holder.

Visibility appears to be an issue for Welsh film and it isn't clear that a comprehensive, distinct Welsh cinema brand exists. There is support among stakeholders for more to develop this identity to use it to promote films with a Welsh connection. Conversations started in this research about Welsh film identity and how Welsh film should be presented to external stakeholders should continue.

Recommendation 4: An interim step for promoting Welsh film could involve a collaboration between key stakeholders in Wales to establish a commonly agreed Welsh film identity.

When drawing this together, FHW and other stakeholders should be aware of the way that Wales is being branded elsewhere, including Welsh Government's Wales branding initiatives. The findings of the survey in this study should also be drawn on.

Recommendation 5: A Welsh film brand should be consistent with the themes underpinning other branding initiatives in Wales including a focus on Welsh history and landscape. Such a brand is likely to require significant investment to have cut-through and an impactful implementation so that Welsh film can reach domestic and international markets more extensively (including through film festivals).

Finally, the research also found that most stakeholders believe Welsh film should be promoted within existing creative industry brands such as 'Creative Wales', but it might be possible for FHW or other sector stakeholders to manage it as a sub brand under the overarching brand for Welsh creative industries.

Recommendation 6: If it is decided that a Welsh film brand is needed going forward, representations should be made to Welsh Government for it to be adopted by the Creative Wales initiative. Discussions could also be held around the possibility of a Welsh film specialist organisation, such as FHW, retaining the responsibility for managing it but as a sub-brand within Creative Wales.

1 Introduction

This report outlines the findings of an independent research study carried out by Wavehill. Film Hub Wales (FHW), with the support of funding provided by Clwster, commissioned Wavehill to carry out research to explore how awareness of Welsh screen content might be increased and how this message can be delivered to digital generations.

To this end, the research has explored FHW's 'Made in Wales' (MiW) activities, with a view towards understanding whether developing them into a more coherent brand for Welsh cinema content would add value to existing efforts to promote Welsh film, increase audience engagement and develop the sector in Wales.

1.1 Film Hub Wales' Made in Wales activities

FHW is one of eight UK-wide 'hubs' funded by the BFI (British Film Institute) as part of the BFI Film Audience Network (BFI FAN).[5] Supported by the National Lottery, BFI FAN aims to provide *"national centres of expertise and support that connect cinemas, festivals and creative practitioners so that people can access a broader range of cinema across the UK"*.[6]

To achieve this, FHW works with over 300 Welsh cinemas, arts centres, community venues, societies, festivals and wider film practitioners to provide better access to Welsh and British independent and international cinema.[7] With Chapter appointed as the Film Hub Lead Organisation (FHLO) in Cardiff, Film Hub Wales *"champions the work of exhibitors, offering inspiration, support and inclusion, bringing British and international film to audiences across Wales and the UK".*[8]

In 2014, FHW launched its MiW activities in order to support films with a Welsh connection with a particular focus on supporting exhibition (i.e. the public screening of films).[9] Since then it has sought to support exhibitors to engage the audience and support filmmakers with theatrical routes in Wales, thereby increasing the number of sites offering Welsh film. The overarching goal is to increase audience engagement with films with a Welsh connection.

[5] https://www.bfi.org.uk/supporting-uk-film/distribution-exhibition-funding/film-audience-network
[6] https://www.bfi.org.uk/supporting-uk-film/distribution-exhibition-funding/film-audience-network
[7] https://www.filmhubwales.org/en/
[8] https://www.filmhubwales.org/en/about-us/faqs/
[9] These include:
1. Screen heritage - professionally made feature films, shorts and documentaries whose rights are held by screen archives or amateur footage held in personal collections in Wales; or
2. Feature films and documentaries:
    a. involving Welsh film talent (director/producer/writer/principal cast)
    b. made by production companies or filmmakers active in Wales
    c. set in Wales, or that deal with Welsh stories, events or people; or
    d. made in the Welsh language.

On average, around eight Welsh films are funded in Wales annually, with FHW offering a range of activities from preview days to online screenings. As part of these activities, FHW works closely with organisations across the screen industry along with other stakeholders such as education, production, distribution, and Government to raise awareness of Welsh film releases and coordinate distribution. They seek to provide the exhibitor network with better information about Welsh film releases as early as possible to improve the post-release campaigns and make it easier to schedule Welsh films.

FHW have been developing longer-term relationships with distributors too. The best example of this is the relationship developed with Bulldog Film Distribution where they worked closely with FHW to promote a Welsh production called 'Gwen'.[10] There were more than 70 screenings of the film between June and October 2019, many of which at small, independent venues in Wales organised in partnership with FHW. FHW also supported Bulldog by introducing them to stakeholders such as Visit Wales to help promote the release in Wales.

1.2 Research scope and objectives

FHW commissioned this research to develop a better understanding of how its MiW activities can best support the Welsh screen industry and engage audiences with Welsh cinema content. They were particularly interested in understanding whether a more formalised MiW brand could effectively support those efforts. The starting position for this research was therefore to identify the potential impact of using place-based branding to support Welsh film alongside asking whether a film brand is the right vehicle to deliver on those aims, or whether there are more effective ways of achieving these goals.

It is also important to note that there are many moving parts within the sector in Wales, posing a risk for duplication in activities undertaken by FHW and other organisations/ initiatives such as Creative Wales and Ffilm Cymru Wales. It is therefore imperative to understand the strategic fit for MiW and identify the best use of the resources at its disposal so that it complements other activities.

Against this backdrop, a theory of change approach was used to identify the potential space for MiW activities going forward. This was supplemented with a review of international models and use of place-based branding within Wales to identify learning that could help shape the future MiW model. Thus, the key research themes for this report are:

- The strategic fit of the proposed 'Made in Wales' film brand: is it the right vehicle to deliver on the objectives identified by FHW?
- What can a MiW brand/initiative learn from other international models?
- What are the gaps in data that prevent FHW from understanding how audiences engage with Welsh content?

[10] https://www.bulldog-film.com/films/gwen/

Findings from this activity is presented in the following chapters:

- Chapter 2 outlines the methodology used for this study
- Chapters 3 and 4 provides context to the research, outlining the Welsh film industry and the rationale for developing MiW into a place-based brand
- Chapters 5 and 6 explore existing branding initiatives in Wales and the branding of Welsh film specifically (including an articulation of Welsh film identity)
- Chapter 7 presents three international exemplars, and
- Chapter 8 concludes the report with a series of recommendations.

2 Methodology

2.1 Stakeholder interviews

Twelve interviews were undertaken with key stakeholders representing different parts of the screen sector in Wales (including education, production, exhibition, distribution) and other place-based branding initiatives outside of Wales. Organisations consulted included:

- The BFI
- Ffilm Cymru Wales
- Into Film Cymru
- Welsh Government
- Visit Wales
- Iris Prize LGBT+ Film Festival
- Pontio
- Northern Ireland Screen
- Creative Scotland
- Bulldog Film.

In addition to interviews with representatives of the above organisations, interviews were also conducted with independent filmmakers.

These interviews were in-depth, qualitative discussions focussing on the Welsh screen industry in general terms, the key challenges within the sector and the extent to which the MiW initiative could help overcome those challenges.

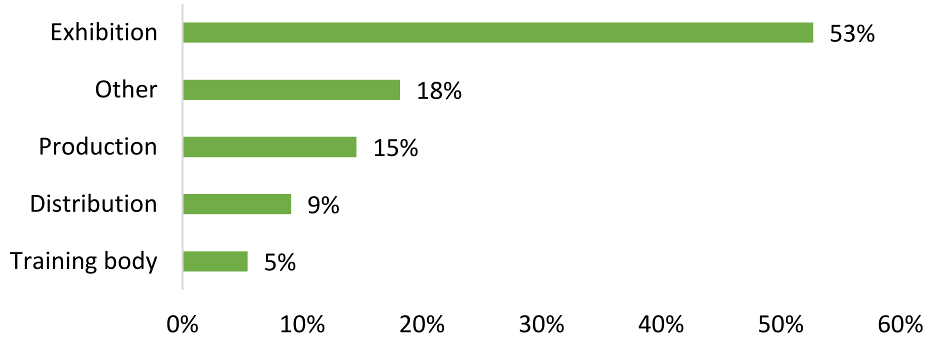
2.2 Survey of sector stakeholders

In addition to these in-depth interviews, a survey of sector stakeholders was also carried out intended to produce a broad overview of sector views about the challenges facing the Welsh screen sector and the viability of MiW as a way of raising awareness of cinema content with a Welsh connection. The survey was distributed through FHW's network of exhibitors, distributors, producers, developers, training providers and other sector stakeholders (including BAFTA Cymru, Screen Alliance Wales, Wales Screen, and broadcasters including BBC Wales, ITV Wales and S4C), generating 56 responses.

It is important to note that, as a self-selecting survey, it does not in any sense attempt to provide a representative sample of the Welsh or UK screen industry. However, it does provide some useful indicative findings on the potential role a MiW initiative could have in supporting the Welsh screen industry.

Most of those responding to the survey were exhibitors (53%; 29/55) but it also included production companies (15%; 8), distributors (9%; 5), training providers (5%; 3) and other organisations involved in the Welsh screen sector (18%; 10).

Figure 2.1: Survey respondents' role within the screen industry



Source: Wavehill Stakeholder Survey (n=55)

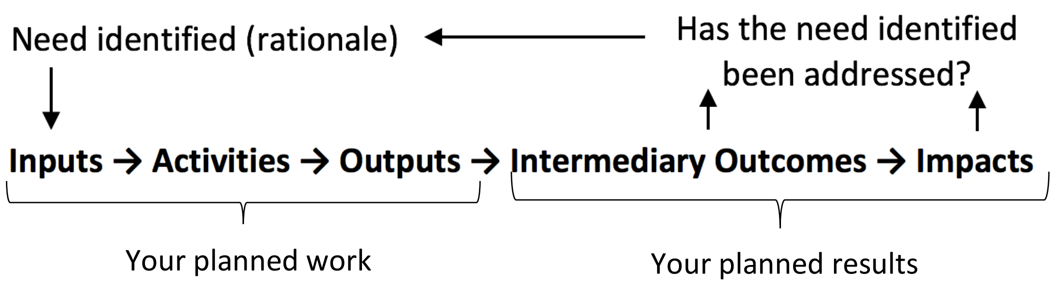
Most of these organisations reported that they operate only in Wales (58%), followed by 33% operating in Wales and further afield. Nine per cent do not operate in Wales at all (33%) – these were included in order to get external perspectives on the industry in Wales.

2.3 Theory of change workshop

A theory of change workshop session was carried out with stakeholders in the Welsh screen sector to further explore the underlying theory and potential fit for MiW.

A theory of change (ToC) is probably best described as a roadmap that sets out the things that need to happen so as to achieve an intended final outcome or goal of an organisation or project. It is also a method of identifying the assumptions that are being made within the identified 'causal chain', barriers that need to be overcome and the enablers — the things that need to be in place for the project to work.

A Theory of Change Presented as a Logic Model



A good ToC is a useful tool for strategy development as it can reveal:

- Whether the activities being undertaken make sense, given the goal of the organisation or project.
- Whether there are things being done that do not help to achieve the goal of the organisation or project (i.e. they do not lead to a relevant outcome).
- Whether there are gaps in the activities being undertaken by the organisation or project (i.e. some of the range of necessary interim outcomes are not being achieved).

- How to measure your impact and/or progress towards achieving the final outcomes of the organisation or project.
- Identifying additional or unforeseen outcomes which may not have been anticipated previously.

In order to develop the ToC, interviews were carried out with a range of stakeholders within the Welsh screen sector, as well as other stakeholders across the UK. This was followed up with a ToC workshop held at Clwstwr in Cardiff. Stakeholders from various parts of the Welsh cinema sector attended the session.

2.4 Desk-based research

In addition to the primary research that has been carried out as part of this research project, there has also been desk-based research, exploring open access information about how Wales has been branded and how other international film have supported exhibition and used place-based branding to raise the profile of the cinema sector in their country.

3 Understanding the challenge

This section explores the main challenges facing the Welsh film sector and how FHW's MiW activities relate to this challenge.

Section summary:

- The creative industries are one of Wales' fastest growing sectors, with an annual turnover of over £1.9 billion and employing over 58,000 people, 52% more than ten years ago.
- According to stakeholders engaged by the survey, the strengths of the Welsh film industry include the crossover with the television sector through S4C and BBC drama relocated to Cardiff, the strength of the animation sector, the talent base and a strong tradition of storytelling and cultural identities.
- At the same time, there is a perception that the film sector has 'stalled' slightly, potentially owing to a lack of a coherent film strategy in Wales.
- Most attention seems to be given to skills gaps within the Welsh film industry, but there are also issues around the visibility of Welsh film.
- Barriers to visibility for Welsh film can be grouped into three categories: demand (i.e. are audiences interested in Welsh film in comparison to blockbuster films); supply (i.e. the quality of Welsh film); and structural (i.e. the support available to produce and promote quality Welsh film). These challenges are circular i.e. better support could lead to a better offer and awareness and in turn increase demand.

This chapter builds on the scoping interviews and survey with stakeholders in the Welsh screen sector. It explores some of the existing barriers preventing the ongoing growth of the Welsh screen industry, stakeholder views on how these might be overcome and whether there is a need for a stronger and more coherent MiW brand to achieve these objectives.

3.1 The Welsh Film Industry

According to Trade and Invest Wales, the creative industries are one of Wales' fastest growing sectors, with an annual turnover of over £1.9 billion and employing over 58,000 people, 52% more than ten years ago.[11] Welsh screen industries has grown more rapidly than cinema elsewhere in the UK, with Welsh GVA in this area growing from 0.9% of the UK total in 2007 to 1.6% of the UK total by 2017.[12]

Stakeholders consulted during this exercise identified a number of the industry's underlying strengths:

- The crossover with the television sector through S4C and BBC drama relocated to Cardiff
- The strength of the animation sector
- The talent base
- A strong tradition of storytelling and cultural identities

[11] https://tradeandinvest.wales/key-industries/creative-industries
[12] https://seneddresearch.blog/2019/07/08/lights-cameraaction-screen-industries-await-the-creation-of-creative-wales/

- The small size of the sector which makes it easier to collaborate.

At the same time, concern has been raised that the Welsh cinema sector has 'stalled' somewhat,[13] and the Senedd's Culture, Welsh Language and Communications committee has identified a need to *"do more to develop the indigenous industry – to help tell Welsh stories that can echo across the world".*[14] At the same time, these concerns have often focused on the need to develop a skills strategy, rather than focusing specifically on the visibility of Welsh films.

3.1.1 Industry support

There are various bodies in Wales that work alongside FHW and have a role in supporting the growth of the sector. Organisations such as Into Film Cymru work with young people to develop skills, grow the talent base, and develop an audience for Welsh film by facilitating the use of film, particularly of Welsh origin, in schools and at events. Organisations such as BAFTA Cymru and the Iris Prize LGBT+ Film Festival have a role in promoting Welsh film and supporting talent. The two main services that work alongside FHW, however, are Creative Wales and Ffilm Cymru.

Creative Wales

Welsh Government's new Creative Wales agency aims to support creative industries in Wales[15]. It was launched in February 2020 as one of the pillars of the overarching Cymru/Wales brand used for the international promotion of Wales. It aims to:

- Drive growth of the creative industries sector in Wales with a more targeted regional and sub-sector focus.
- Develop the right skills across the sector to support continued growth, working closely with industry and trade union partners.
- Raise standards and promote diversity and equality.
- Simplify funding support for the creative industries to respond to the fast pace of the sector, and
- Take a lead role in the marketing and promotion of the creative industries in Wales to the world, via a new Creative Wales brand.

It is part of the wider Cymru Wales brand family with Wales' creative industries considered one of the key vehicles for Wales to promote itself to the world in terms of its excellence in the industry but also to showcase the country as a place for individuals to visit, live and invest.

It is important to note that film and TV is one of its three key sub-sector focuses. This might suggest that Creative Wales is a more appropriate vehicle, given the resource behind it, to promote a Welsh film brand internationally. Notably, however, Creative Wales do not appear to support film exhibition, which is the primary focus of FHW and its MiW initiative to date.

[13] https://www.bbc.co.uk/news/uk-wales-48286863
[14] https://senedd.wales/en/newhome/pages/newsitem.aspx?itemid=1986
[15] https://www.wales.com/creative-wales

Ffilm Cymru Wales

Established in 2006, Film Cymru is a development body for cinema in Wales with a vision to advance a sustainable film sector and culture that works for everyone across Wales. They work across the piste, supporting filmmakers early in the process through to supporting exhibition in Wales. They also have a strong education and employment focus, aiming to develop pathways for careers and develop talent. Thus, there appears to be some crossover between Ffilm Cymru's remit and that of other industry support services including FHW.

Ffilm Cymru support aspiring filmmakers by providing funding, career guidance and mentoring opportunities. They run a short film fund with targeted script development and production support to encourage new talent. They also provide a Development Fund programme, distributing more than £300k in 2018/19 to support the development of live-action, documentary, and animated feature films. In the same year they also invested almost £800k through their Production Fund for eight films featuring Welsh talent.

Advice and funding are provided to cinemas, film festivals and pop-up screenings with £170k provided in 2018/19 through their Audience Access award.

3.2 Establishing the need for a MiW initiative

3.2.1 Funding support for film distribution, marketing and exhibition activity

One area explored in the survey concerned the funding support made available for distribution, marketing, and exhibition activity. In total 30 respondents were currently recipients of some form of public funding for film distribution, marketing or exhibition.

The funding has been mainly utilised to facilitate the screening of place-based film (38%). Importantly, six of these respondents explained that the funding is critical to showcasing Welsh/independent film without the fear of being at a financial loss. Showcasing such films is seen as a risk and without the financial support it is likely that many of these exhibitors would not have the confidence to showcase Welsh film.

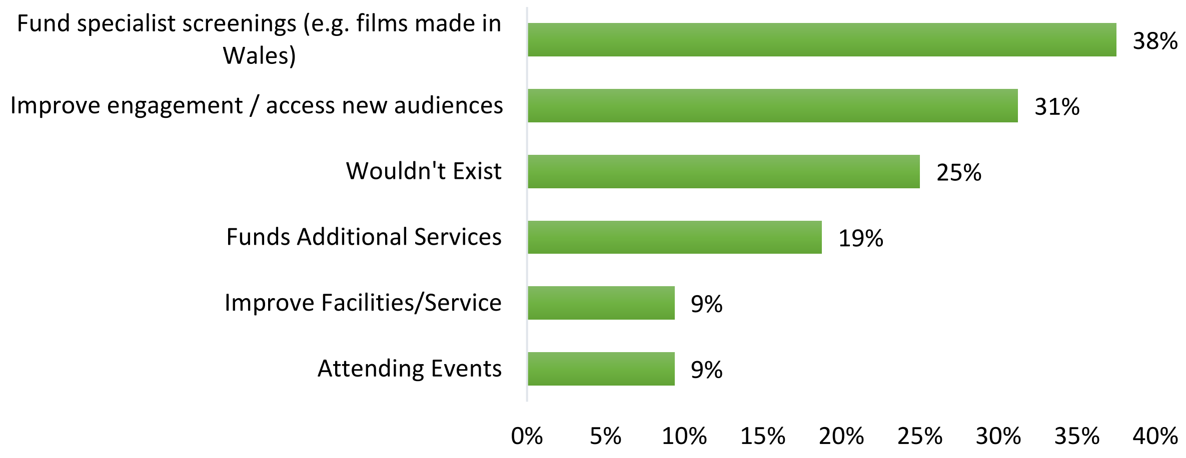
Additionally, 31% of respondents explained that the funding had enabled them to expand their exhibition/marketing activity and reach new audiences, as well as investing in their operation to improve their sustainability. These responses have been coded and shown in Figure 3.1 below whilst examples of these sentiments are shown in the following quotes.

"Screening non-blockbuster films is always a risk; funding has helped us make more of a feature of the screenings of films made in Wales/linked to Wales e.g. through associated events - music, Q&As, training for young people etc."

"Enables us to run films without fear of losing significant money if no-one comes!"

"Vitally important for giving confidence to exhibiting certain films, accessing talent for Q&As and enhanced publicity presence - all extremely difficult to achieve without."

Figure 3.1: Coded responses on the importance of funding support



Source: Wavehill Stakeholder Survey – recipients of public funding (n=30)

These data demonstrate the importance of financial support for many organisations operating within the Welsh screen industry and for any ambition of increasing audience engagement with Welsh film.

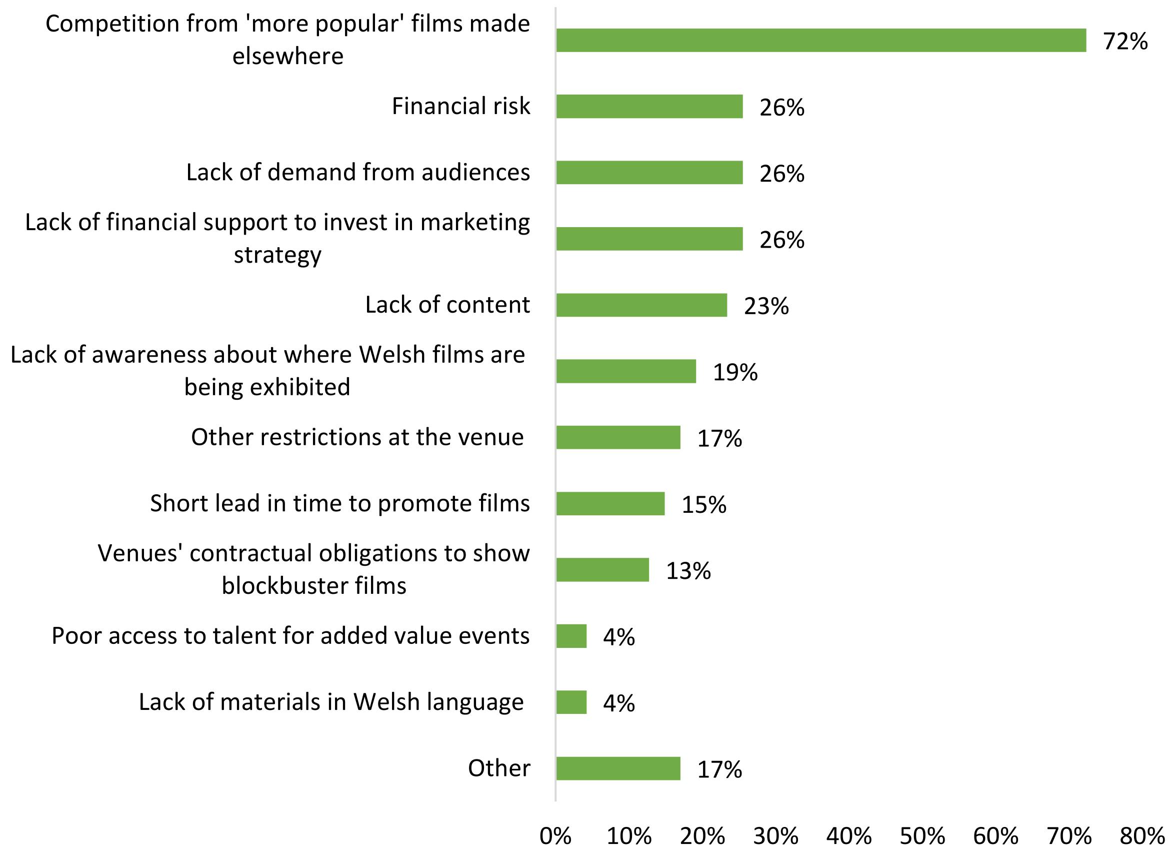
3.2.2 Barriers to exhibiting films with a Welsh connection

Overview

Data collected in the survey suggests that organisations feel there is an array of barriers limiting the extent to which screen content with a Welsh connection is exhibited in Wales. The one barrier that was by far the most common throughout the survey responses was the competitiveness of the industry and the existence of 'more popular' films, (72%; 34/55) of survey respondents reported this (see Figure 3.2 over page).

The barriers can be grouped into three categories which are all inter-linked: demand (i.e. are audiences interested in Welsh film in comparison to blockbuster films); supply (i.e. the quality of Welsh film); and structural (i.e. the support available to produce and promote quality Welsh film). There is a clear interconnectedness to these categories e.g. better support could lead to a better offer and awareness and in turn increase demand.

Figure 3.2: Barriers that might prevent screen content with a Welsh connection being exhibited in Wales



Source: Wavehill Stakeholder Survey (n=55)

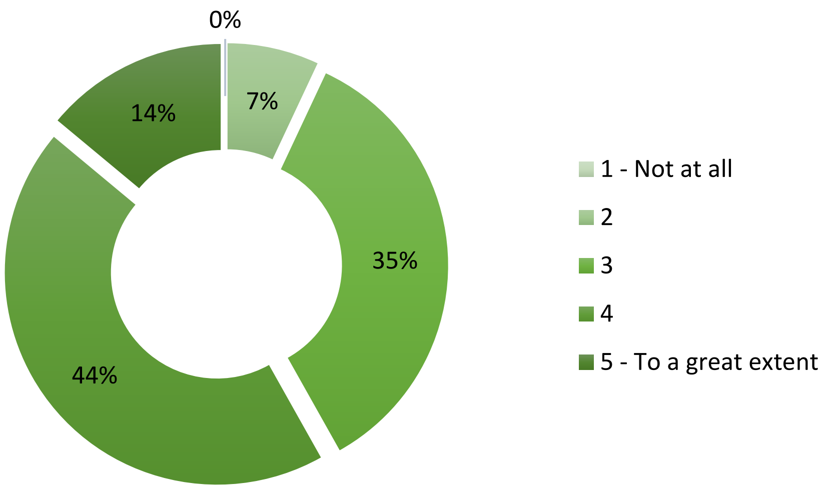
Supply and demand

Figure 3.2 suggests that industry stakeholders believe the main issue in exhibiting Welsh content concerns the quality of its production. It cannot compete with 'more popular' films (72%) and there is a lack of content (23%), leading to a lack of demand from audiences (26%). The quality and scale of content was a clear theme emanating from our more detailed interviews where a lack of content was described by one stakeholder as "*the fundamental issue.*" Another stakeholder also described production as the main challenge, stating that there is a very small talent pool and consequently of the films that are produced each year (typically around eight), many would not have proceeded in an environment with a larger talent pool/range of development projects to choose from:

"There are lots in the development space where they don't have to be seen but there is an expectation for them to be seen. If you constantly show something to an audience that is not up to scratch it will have an impact on the brand. Within that, there will be some jewels".

Despite 26% of survey respondents indicating a lack of demand as a current challenge, the vast majority do believe there is interest in Welsh film and thus good potential for latent demand. When asked to what extend they agreed with the statement *'Audiences in Wales are interested in seeing screen content with a Welsh connection'*, most respondents were quite positive in their response with 58% selecting the highest two options.

Figure 3.3: Perceptions of interest among Welsh audiences in seeing Welsh film



Source: Wavehill Stakeholder Survey (n=55)

It is clear in the elaborations of these scores that most respondents believe audiences in Wales want to see Welsh films for intrinsic (i.e. out of a genuine interest in seeing film that is more relevant to them) and identified reasons (i.e. they want to support Welsh content). Examples of these comments are provided below.

“We've had very successful screenings for recent titles such as Gwen and Mr. Jones - far more popular than in the rest of the UK and the Welsh elements have been essential in drawing these large crowds out to the cinema. A sense of seeing on screen a film that has something (however tangentially) to do with them and their lives and their identities is to me an obvious factor in the success of these films.”

“People want to see their own culture depicted and reflected in some of the films that they watch.”

Thus, the perceived issue appears to be one of supply rather than demand. As one respondent put it:

“We have found that our audience loves films with a Welsh connection. Our dilemma is in finding strong Welsh films that can compete with more popular films, or films that have much greater publicity.”

The other 42% of respondents were more sceptical however, with 7% appearing to disagree with the statement by providing a score of 2. Whilst acknowledging that being made in Wales may be a small pull-factor or might be important for some, these respondents were generally of the view that other factors are more important. The comments also reveal differing opinions on the importance of various types of Wales-made films with some suggesting that being literally made in Wales is most important and others suggesting having a Welsh cast or focussing on Welsh stories is most important.

"A certain audience is most definitely interested in Welsh content, but I can't imagine you could call it a majority - I imagine the majority more interested in the blockbusters."

"There is interest, but whether it's Welsh or not is never the sole motivation - though if it is SET in Wales, especially locally, that does seem to have an impact e.g.: Gwen, Last Summer. Otherwise it does of course depend on the individual film."

"It depends what the connection is - known Welsh talent or an interesting Welsh story might be enough to push interest within the audiences but just being set in Wales isn't going to be enough to offset an otherwise weak film."

"We have been running our community cinema for three years and in all that time we have not had any support from audiences or discussion about wanting to see films made in Wales. This is something that is not on people's radars in the areas we serve."

Structural challenges

Figure 3.2 also reveals several structural issues which may prevent further exhibition of Welsh film. Around a quarter stated that the financial risk of showing Welsh film acts as a barrier. This is consistent with earlier comments that financial support is needed to alleviate the risk of screening non-blockbuster films for some venues. The same proportion of respondents (26%) also cited that there is a lack of financial support to invest in marketing, thus preventing Welsh film from fulfilling its potential and acting as a barrier to industry growth.

Awareness is clearly perceived as an issue among stakeholders with around a quarter of respondents also citing that there is a lack of financial support to invest in marketing. Similarly, 19% also cited a lack of awareness about where Welsh films are being exhibited whilst 4% cited a lack of materials to promote Welsh film in the Welsh language. Some of these themes were also apparent in our detailed stakeholder interviews, with one stakeholder stating that budget for exhibition/education in Film Cymru is low.

A lack of forward planning and strategic thinking within the industry were other structural challenges reported in our consultation. It was reported that it can be common for exhibitors to not be told about a film release until two weeks in advance, leading to issues such as limited or non-existent press campaigns to promote films as well as uncertainty for venues who do not know if and when they will be able to show upcoming releases. In recent years FHW have led 'Made in Wales' to promote a more coordinated, strategic approach and an opportunity to share information to have longer lead-ins so people can programme and then market material. However, it has not always been possible to receive information as quickly as they would like.

Further structural challenges include the lack of a major festival launchpad and the lack of distributors based in Wales which means there is a distance from major decision-makers. The economies of scale have a clear impact in distribution and exhibition with regards to what is shown and there is a lack of major film productions in Wales.

More generally, there was a perception that investment in marketing and exhibition support for Welsh film is not prominent enough, particularly when compared to other small countries such as Iceland, Denmark and Ireland who have taken steps to invest in their respective film industries to raise their profile nationally and internationally. According to one stakeholder:

"We need to be bolder as a nation. We are quite casual in our approach towards festivals. There are international film festivals in Wales - but not much support for it."

These issues are likely to prevent Welsh film from fulfilling its potential and act as a barrier to industry growth. Clearly, a Welsh film brand such as MiW could help to address those challenges.

Distributor perspectives

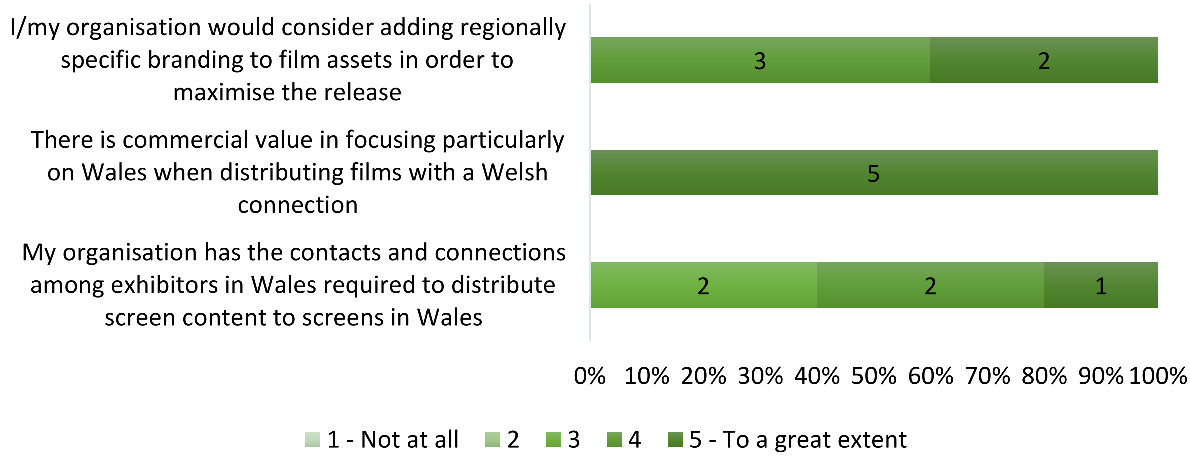
The five distributors surveyed were asked whether they agreed that there is commercial value in focusing particularly on Wales when distributing films with a Welsh connection. Again, a five-point scale was provided and all five provided the highest score of five (see Figure 3.4 below), further demonstrating that there is a perceived demand for Welsh film.

There was less agreement with the statement that their organisations have the connections among exhibitors in Wales to distribute screen content to screens in Wales – two gave a middling score of 3. One distributor highlighted further structural issues:

"It's maybe hard for us to get our films into these cinemas because bigger distributors fill-up schedules. We have to grow relationships from scratch with these indies and it's hard to get stuff booked. We still found that it took us a long time to get stuff scheduled. You wonder whether things would have been better if stuff came out closer to release date. We felt that some venues were too late in scheduling stuff."

This would again imply that structural issues are perceived to be the biggest challenge for distributors. However, it is important to stress the small size of this sub-sample and that these are organisations who are already known to FHW and thus may not reflect the perspectives of distributors more broadly.

Figure 3.4: Distributor perceptions on distributing/exhibiting Welsh film



Source: Wavehill Stakeholder Survey - Distributors only (n=5)

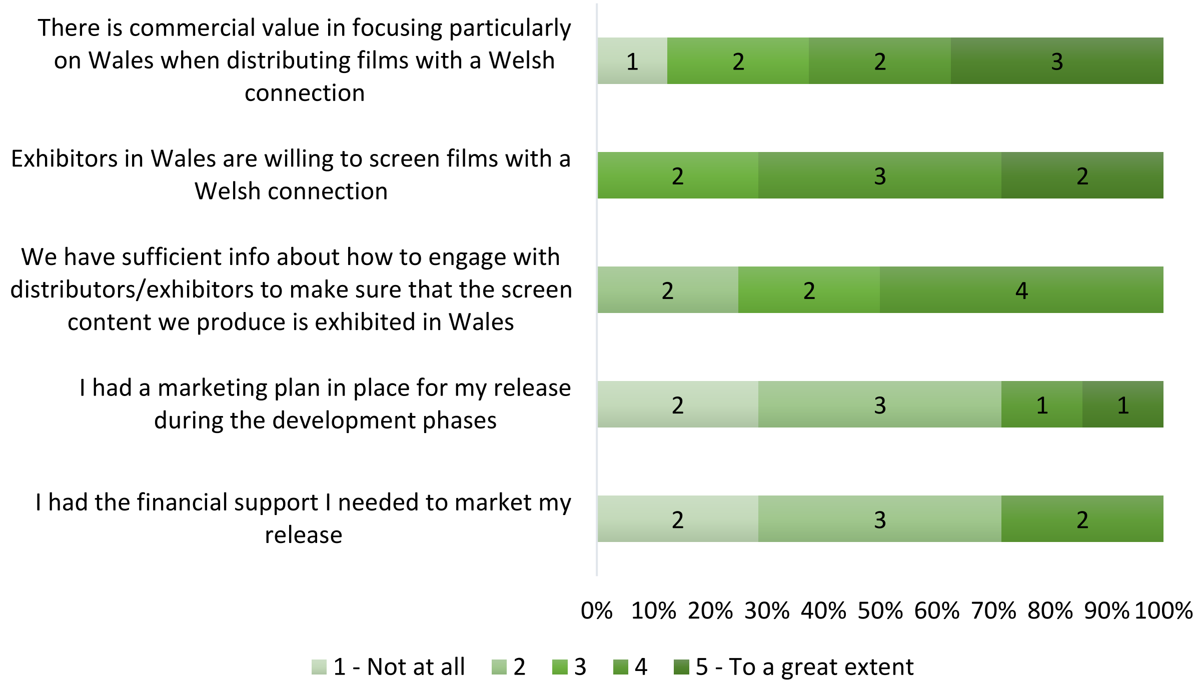
Producer/Developer perspectives

Producers and developers were also positive about the commercial value of focussing particularly on Wales when distributing films with a Welsh connection (see Figure 3.5 below). Using the same scale (1=not at all, 5= To a great extent), respondents provided a mean score of 4.3 for that statement. Surveyed producers and developers also generally believed that there is a willingness amongst Welsh exhibitors to screen Welsh film.

Respondents were less confident in relation to having sufficient information to engage with distributors/exhibitors to screen their films – two slightly disagreed with this statement. This would add weight to previous findings suggesting a lack of communication, knowledge transfer and connections between the different stages of industry.

The two main barriers, however, are to do with marketing – five indicated they did not have a marketing plan in place for their release during the development phases and five also disagreed that they had the financial support they needed to market their release. This is again consistent with previous findings which suggested that the support available in Wales particularly around promoting films does not meet the needs of the sector.

Figure 3.5: Producer/Developer perceptions on distributing/exhibiting Welsh film



Source: Wavehill Stakeholder Survey – Producers/Developers only (n=8)

Exhibitor perspectives

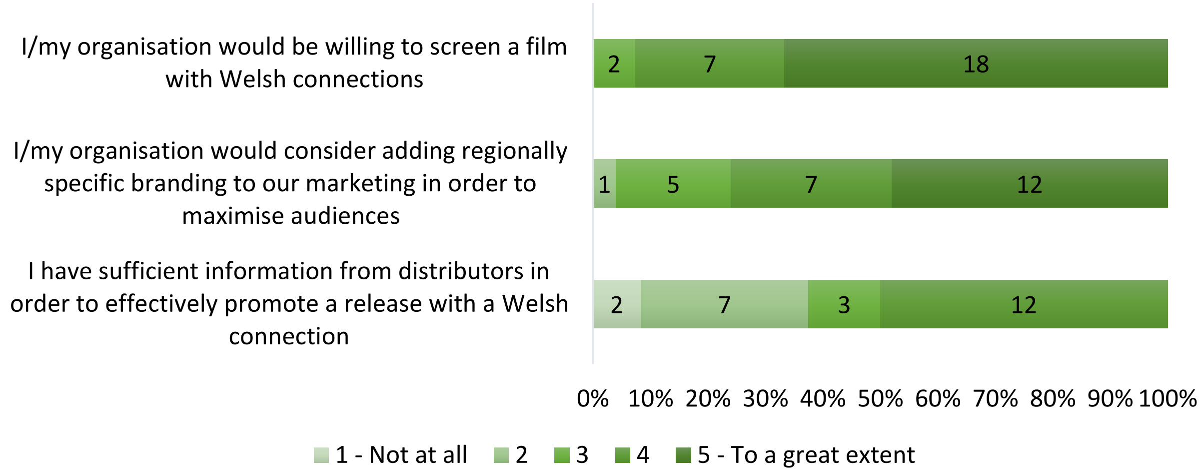
The vast majority of exhibitors surveyed indicated that they would be willing to screen Welsh film, suggesting there isn't a supply issue from their part (usual caveats apply around sample unrepresentativeness). There was far less agreement, however, around having sufficient information from distributors to promote Welsh film releases. The fragmented nature of the Welsh screen industry and lack of communication from stage to stage is clearly a reoccurring theme in this stakeholder consultation. This, along with the lack of support for promoting Welsh film, appears to be some of the main barriers to future success:

"Information from distributors varies. The FHW screening days are massively helpful in deciding whether a film can suit some of our audiences."

"Assistance with national advertising would be really beneficial. With mainstream film the content is understood due to promotion before we book the film. Understanding of where the film has been filmed and details of Welsh casts greatly helps with promotion."

"Welsh film exhibition development and marketing support is vital to ensure that the talent and voices of Welsh film makers are heard. Effective funding for a national marketing banner would support exhibitors like us to promote made in Wales screenings to broader audiences. We would support any campaign that seeks to create greater awareness, shares marketing about the film making industry in Wales, which inevitably would support Welsh film to be more widely seen, critiqued, celebrated, and enjoyed nationally and internationally.

Figure 3.6: Exhibitor perceptions on distributing/exhibiting Welsh film



Source: Wavehill Stakeholder Survey - Exhibitors only (n=28)

3.2.3 Data gaps

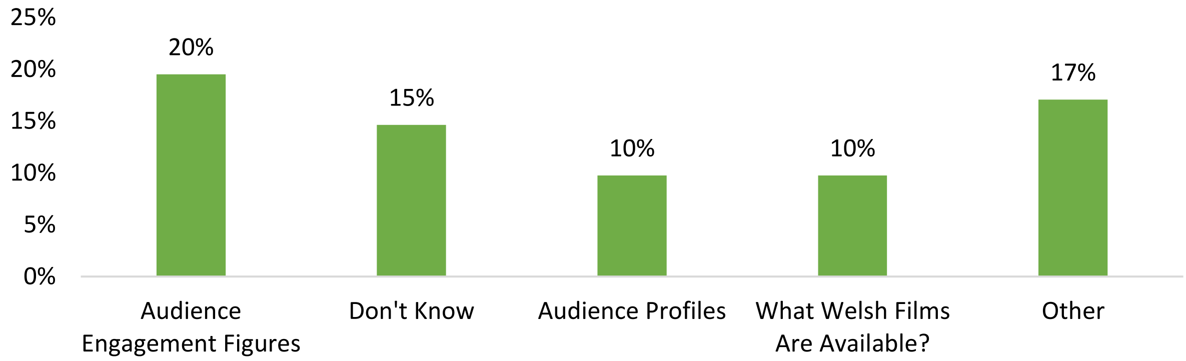
Having as much data as possible is critical to understand the demand for Welsh film, its performance, and the nature of audiences. This would better inform decision-making around which films to promote and how to promote them. Data such as admissions, audience profile, revenue generated, commercial investment gained, and even which films have been funded (and why) have all been highlighted as areas that could better inform decision making.

Stakeholders were generally unsure about the type of data available and its accessibility. Only six survey respondents reported that they themselves collect relevant data: two exhibitors held audience engagement data that they would be willing to share; two other organisations held data on historic productions filmed in Wales; whilst data was also held on filming schedules, crew shortages, and use of Welsh film in schools.

One stakeholder suggested that Comscore hold data on Welsh audiences, although another indicated Comscore does not collect data from independent cinemas and thus the data is more likely to sit with exhibitors and distributors. Our survey data, however, suggests that most of these organisations do not hold data relating to Welsh screen – of the 30 exhibitors and distributors who answered the question, only 2 (7%) held that data. The only other suggestion made was to contact the Arts Council of Wales for a breakdown of productions.

Survey respondents were also asked to identify data gaps surrounding the cinema sector in Wales. The most widely perceived data gaps were audience engagement figures (8), Welsh films availability (4) and audience profiles (4).

Figure 3.7: Data gaps identified by survey respondents – coded responses



Source: Wavehill Stakeholder Survey (n=55)

The lack of data was identified as a barrier in several of the in-depth interviews with stakeholders too. The issue appears to be two-fold: there may be a significant lack of data being collected and, secondly, where data is collected organisations do not always feel obliged to share the information. According to one of the stakeholders:

"If no data is collected, you can't do any kind of stock-take on how films have done… you can't understand economic impact. Some level of discretion has to be held by rights holders, but this data is needed to grow the industry."

Another stakeholder suggested that this type of data does not currently exist, and exhibitors should be encouraged to collect the data on their CRM systems e.g. to track spikes in attendance and then compare to a benchmark e.g. their average attendance for those timeslots.

The consultation also revealed that some distributors found it difficult to identify Welsh cinemas to screen their Welsh films, whilst other stakeholders would value receiving data from distributors to know where their films are screened in Wales. It was explained that there isn't currently a 'one stop shop' for audiences to find out where they can see Welsh film and that there should be both an audience facing and business to business platform to access that data.

These findings once again demonstrate the lack of intelligence collected and shared between the various components of the film sector in Wales.

4 Made in Wales Theory of Change

This chapter outlines a theory of change (ToC) for FHW's 'Made in Wales' activities.

Section summary:

- This ToC was developed at an early stage of the MiW research and used to inform subsequent research activities. It explores how Made in Wales activities could, in conjunction with other initiatives, help to overcome the visibility gaps for Welsh cinema content.
- This chapter is based on stakeholder interviews and the discussions that took place with members of staff within FHW and key partner organisations.
- The ToC is best thought of as a 'best case scenario' of what could happen if MiW activities are carried out. At this stage, no judgement is being made on the suitability of the activities carried out or the likelihood that a MiW strategy would be successful in achieving its goals.

4.1 Identifying the big picture

The ToC workshop began with identifying the long-term goals of MiW activities. It did so by using a challenge statement:

"Film Hub Wales wants to increase audience engagement with films with a Welsh connection."

Workshop participants were then asked to identify why this is important. Focusing on 'why' enables the ToC to understand the big picture of what MiW activities are contributing to. Responding to this question, participants identified several long-term outcomes as a result of increased engagement with films with a Welsh connection. These were divided up into two categories: economic outcomes and cultural outcomes.

Economic outcomes:

- Inward investment for Wales
- Audience/market development for films
- Greater recognition for Wales internationally leading to economic benefits (e.g. film tourism)
- Producers, exhibitors, and distributors supported to continue making film in Wales
- New talent inspired to enter the industry.

Cultural outcomes:

- A more culturally self-confident Wales
- Greater recognition for Wales internationally (soft power/cultural clout)
- A greater platform for Welsh stories to be told
- More recognition for Welsh talent.

4.2 Identifying barriers

A key theme here is that films with a Welsh connection do not have as high a profile within the exhibition sector as they might otherwise do. Overcoming barriers preventing more Welsh films being exhibited in Wales may contribute to the long-term outcomes identified in the previous section.

To this end, once long-term outcomes had been identified, the ToC workshop asked participants to identify the barriers that are currently preventing more audiences from engaging with Welsh cinema content. A particular focus for this conversation was the barriers that might prevent audiences engaging with this content in an exhibition setting (i.e. at a public screening). These were discussed along with additional barriers identified during scoping interviews carried out prior to the workshop. These barriers have been grouped thematically below.

Structural/strategic barriers:

- The lack of a joined-up approach between agencies supporting the Welsh film sector and, at times, Welsh Government
- The relative lack of focus on exhibition within Welsh cinema strategy.

Exposure and perceptions:

- The perception, perhaps erroneous, that Welsh cinema lacks quality
- Lack of Welsh language content
- Accessibility of content (e.g. subtitling)
- Screen capacity, particularly for independent cinemas
- Lack of clear, decipherable Welsh film identity and a brand to promote it.

Market supply behaviour:

- Distributors dictating terms to exhibitors: e.g. how long the run has to be
- Lack of appreciation/understanding of the potential value of Welsh films among distributors
- Films not always being made accessible in formats that support community venues (i.e. DCP v. DVD)
- Competition from more mainstream 'Hollywood' films.

Knowledge deficits:

- Distributors lacking contacts within the Welsh exhibition sector
- Some within the production sector do not know how early in a film's lifetime exhibitors have to be engaged
- Stakeholders are informed of Welsh films late in the process, thus limiting the opportunity for marketing and exhibition
- Individuals and stakeholder organisations not knowing where films with a Welsh connection will be shown.

Data gaps:

- Lack of benchmarks to understand performance of films with a Welsh connection within and outside Wales
- Information not being shared between different partners.

4.2.1 Understanding how MiW fits in

There are a myriad of different organisations working in the Welsh cinema sector including attempts to promote the sector at a Government level (e.g. through Creative Wales) along with organisations such as Ffilm Cymru Wales and Into Film. It is therefore important to understand where the various responsibilities lie for supporting the sector and how MiW can add value and fit into this complex landscape to help achieve the goals outlined above without duplicating existing activity.

Based on the stakeholder interviews and the ToC workshop, there are potentially four areas in which FHW's MiW activities help to overcome some of these barriers. Although all are important parts of what FHW does, they do not have to be done together. There is the potential that these activities could be done independently. Likewise, there is the potential that some of these activities could be carried out collaboratively in conjunction with other stakeholders. These four areas of activities are outlined below.

1. Networking and ensuring better engagement between different parts of the film industry

FHW's MiW activities help to overcome information deficits by linking up producers and distributors with the exhibition sector and other key stakeholders in Wales. This includes:

- Using FHW's network of exhibitors in Wales to facilitate access to exhibition for distributors promoting films with a Welsh connection.
- Ensuring all key stakeholders within the network know about films with a Welsh connection as early as possible to promote and support them.
- Educating distributors about how best to engage exhibitors in Wales.

By improving the relationships between producers, distributors and exhibitors in Wales, FHW has the potential to ensure that more films with Welsh connections are exhibited on screen in Wales and more people know which films have Welsh connections. It is hoped that this will raise the profile of the film industry in Wales, thereby encouraging more talent into the industry and generate more interest among audiences.

2. Collecting and sharing key data

FHW's MiW activities have a role to play in overcoming the information deficits outlined above. There is the potential for MiW to play a role in three main areas:

- Using its networks to collect and collate data that will establish benchmarks for films with Welsh connections being screened in Wales.

- Sharing this data with key stakeholders (across production, distribution and exhibition sectors) to enable information-based decisions to be made about screening films with Welsh connections in Wales.
- Providing information to stakeholders and audiences about where films with Welsh connections are being screened.

Working on the hypothesis that information deficits are a key barrier preventing more films with Welsh connections from being screened in Wales, providing this data to stakeholders will help producers, distributors and exhibitors to make data-driven decisions about screening films with Welsh connections in Wales. Finally, by providing information to stakeholders and audiences about where they can see films with Welsh connections (information which is not currently collected or held centrally), MiW has the potential to overcome information deficits for this group.

3. Supporting the marketing and promotion of films with a Welsh connection

The third activity undertaken by MiW is supporting the marketing and promotion of films with a Welsh connection. It has the potential to do this in two main ways:

1. Supporting specific marketing and promotion activities for films with a Welsh connection by providing funding or other support to assist their efforts
2. Developing a MiW brand to consistently market films with a Welsh connection to audiences and exhibitors in Wales.

Each of these activities has the potential to encourage more audience engagement with cinema content with a Welsh connection being screened in cinemas. It is hypothesised that increasing engagement with Welsh cinema content will have long-term impacts on perceptions of Welsh films, help expand the audience for Welsh cinema content and ensure that more talent is inspired by the Welsh stories they have seen in the cinema.

At the same time that these were identified as important, it is not clear the extent to which this is something that FHW can undertake alone. There are clear overlaps with the remit of Creative Wales. It may be that some of these activities, particularly around developing a brand to ensure that Welsh cinema content is marketed consistently and effectively, are better supported through collaboration with other agencies such as Creative Wales, rather than something that is delivered by FHW alone.

4. Working with sector partners to ensure that exhibition is better represented within Welsh film strategy

The fourth and final MiW activity is working with sector partners to ensure that exhibition is better represented within Welsh film strategy. It is anticipated that there are two ways in which this can be achieved.

- Lobbying other organisations/stakeholders (e.g. Welsh Government and Creative Wales) to ensure that exhibition is represented within their strategies for the Welsh cinema industry
- Working collaboratively with other stakeholders to ensure a shared vision for Welsh film.

These are potentially very important activities, leading to exhibition being better represented within Welsh cinema strategy than it currently is, as well as, if done effectively, ensuring consistency in the way that Welsh cinema is presented.

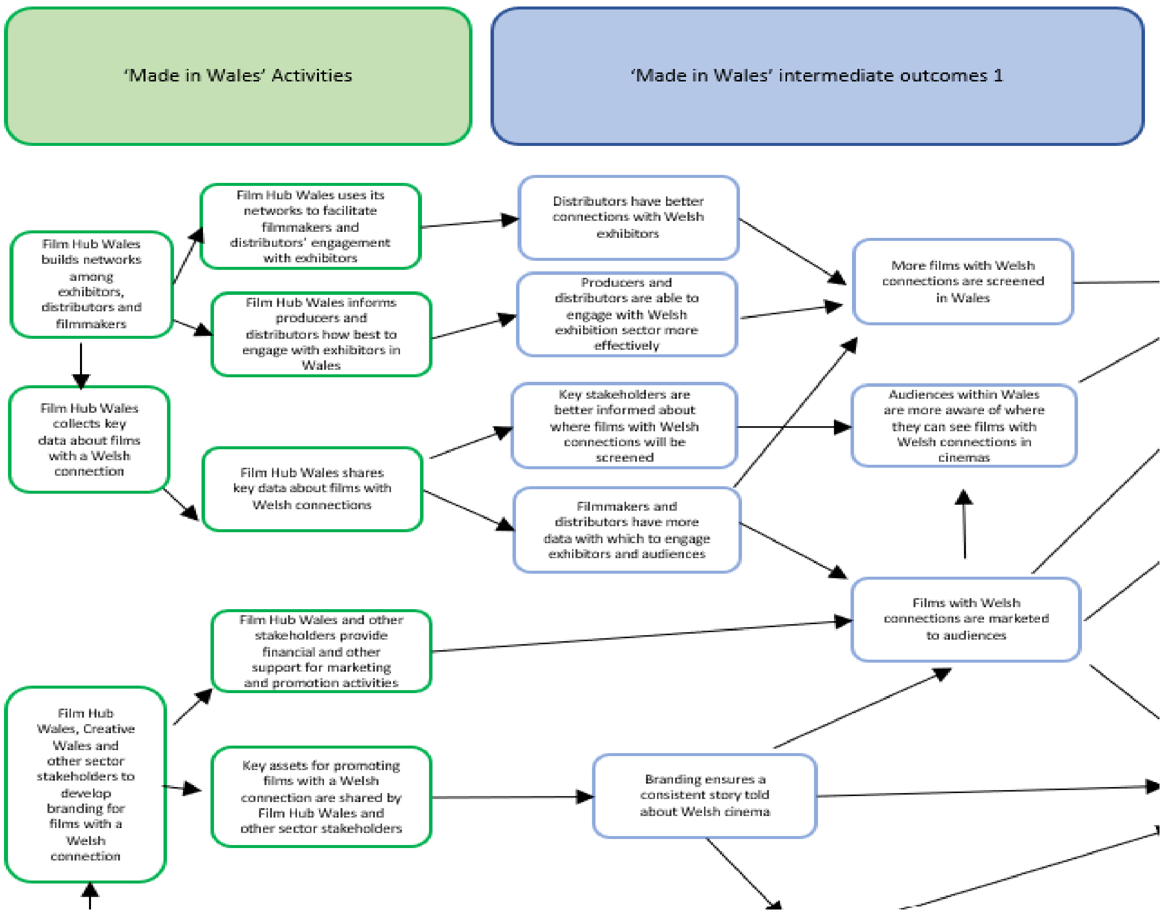
4.3 Presenting the theory of change

Given the complexity of the discussions, and the relatively small size of FHW, a decision has been taken to present the ToC in several stages.

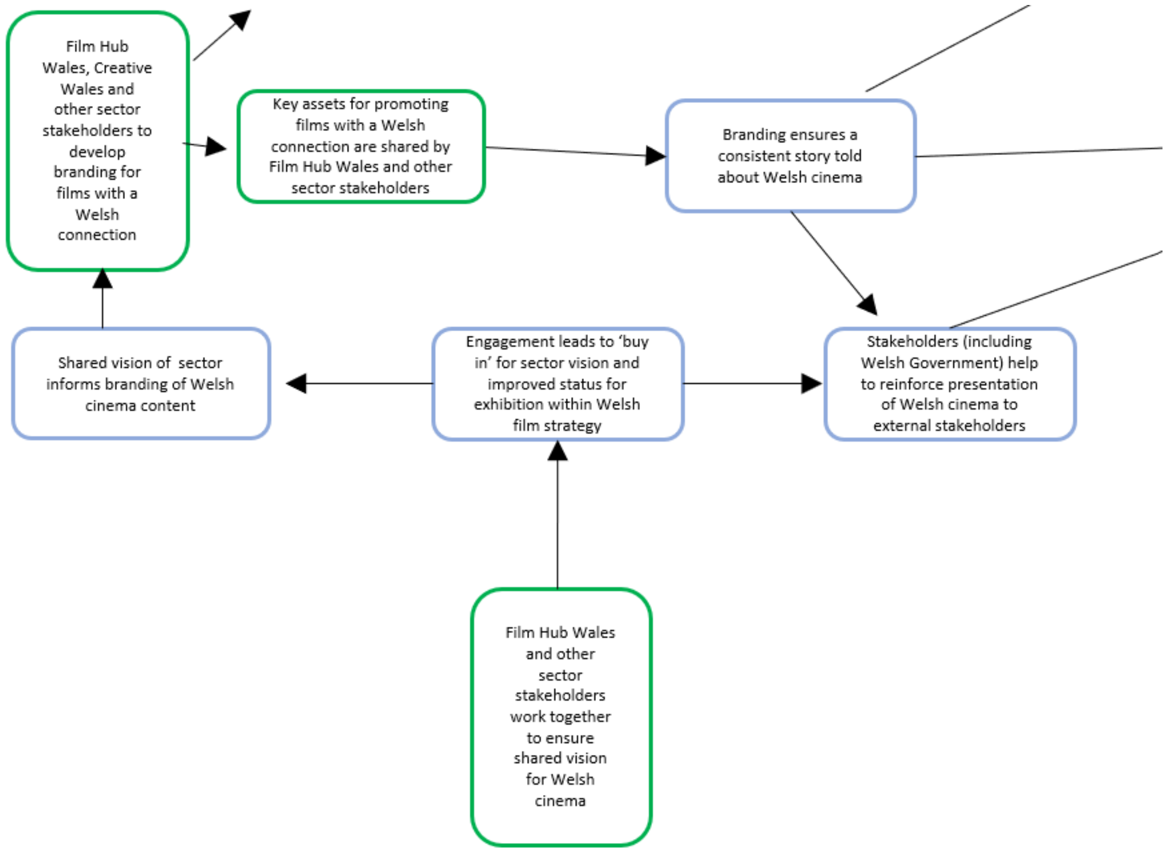
4.3.1 MiW activities and intermediate outcomes

MiW activities have been presented in the graphic below. Green boxes indicate actions taken by FHW (either independently or in conjunction with partners) and blue boxes indicate outcomes that result from MiW activities. It follows the four broad strands of MiW activities outlined in the previous section, moving from actions carried out by FHW (and partners) onto the outcomes of those actions.

These are relatively short-term outcomes, resulting directly from MiW activities, leading to more films with Welsh connections being screened in Wales, audiences in Wales becoming more aware of where they can see films with Welsh connections in cinemas, and films with Welsh connections being marketed to audiences, and a sense of brand identity ensuring that a coherent, consistent story is being told about Welsh cinema.



There are also outcomes as a result of FHW's lobbying activities. By working together with other sector stakeholders, including Ffilm Cymru Wales, Into Film, Creative Wales and Wales Screen, there is the potential for the shared vision of Welsh film to inform Welsh film activities.

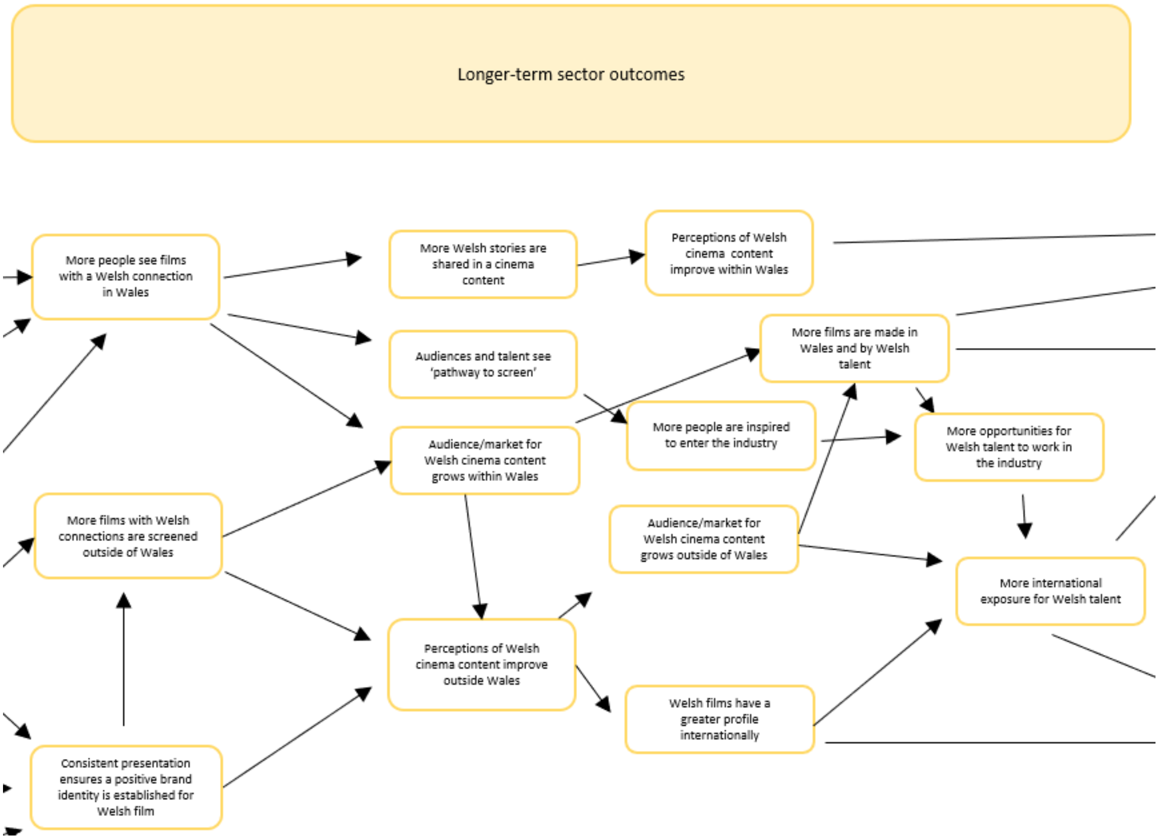


Most immediately, engagement has the potential to raise the profile for the exhibition sector within Welsh film strategy. This engagement with other stakeholders has the potential to underpin the branding of Welsh cinema content, and inform the way that external stakeholders such as Welsh Government tell the story of Welsh cinema and present it to others outside the Welsh film sector.

4.3.2 Longer-term sector outcomes

It is important to situate the short-term outcomes (identified above) with longer-term outcomes for the sector. The 'final' intermediate outcomes (listed above) are anticipated to lead to more people seeing films with a Welsh connection.

The ToC identifies different pathways within and outside Wales, recognising that more steps may have to be taken in order to achieve longer-term outcomes outside Wales, within which Welsh cinema content is likely to have more resonance anyway. It is recognised within the ToC, therefore, that it may require more time to build a brand identity outside Wales than inside.



The ToC then shows that it is anticipated that greater exposure to films with a Welsh connection will lead to perceptions of Welsh cinema content improving (both inside and outside of Wales), audiences and talent seeing a 'pathway to screen', audiences for cinema content with a Welsh connection growing (both inside and outside of Wales), leading to more films made in Wales and by Welsh talent, greater international profile for Welsh films, and more international exposure for Welsh talent.

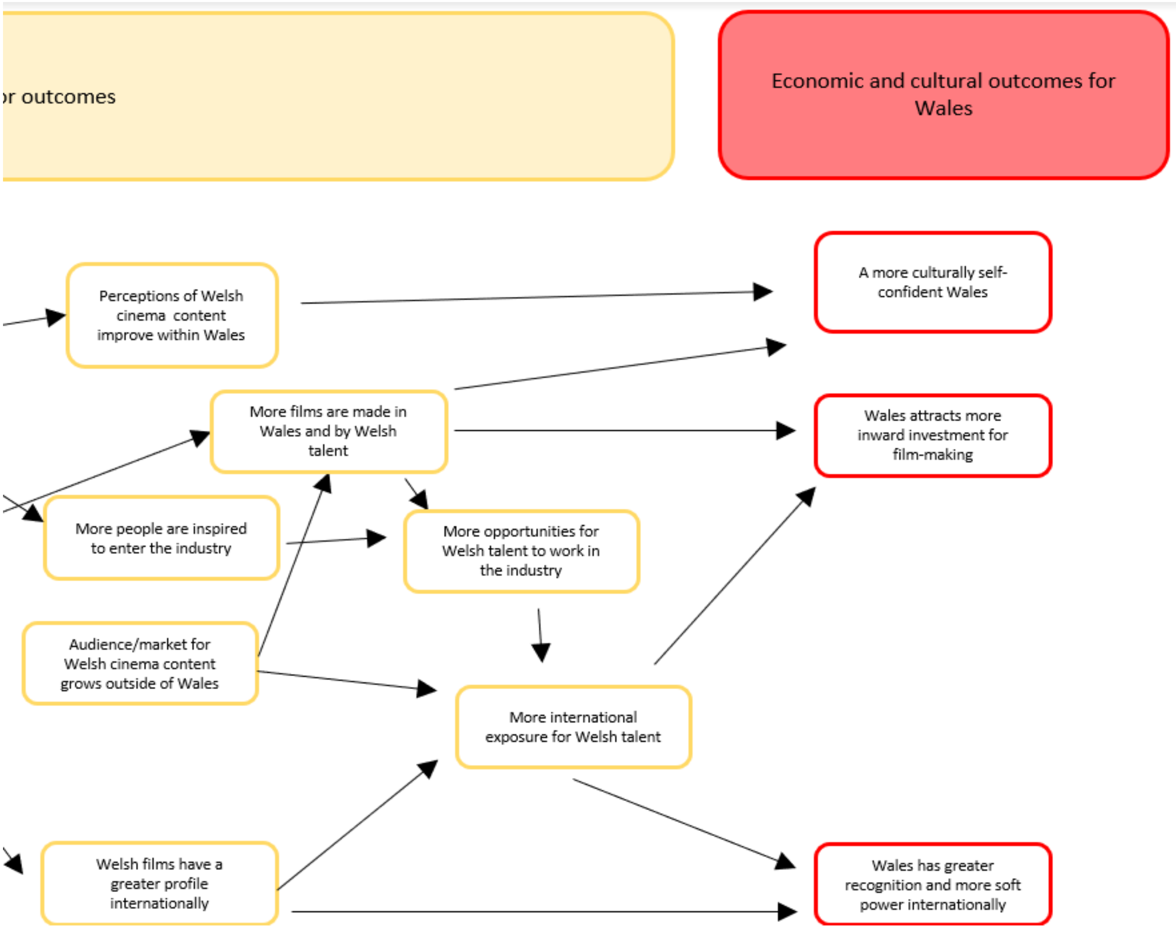
At the same time, these long-term sector outcomes are complex, and they cannot be brought about alone. There will also need to be significant investment in skills and new talent in order to ensure that Welsh cinema has the quality to ensure that increased exposure for Welsh cinema content leads to sustained growth. Investment in talent development, as well as upskilling the technical side of the Welsh film industry is undoubtedly also key if this is to happen. These activities have, however, been left out of this ToC, as they do not relate directly to activities undertaken or supported by FHW.

4.3.3 Economic and cultural outcomes for Wales

There are also higher level economic and cultural outcomes for Wales that are of significance to stakeholders outside the Welsh film sector, including Welsh Government. These outcomes are linked to the longer-term sector outcomes mapped out in the previous sector.

These economic and cultural outcomes include:

- A more culturally self-confident Wales
- Attracting more inward investment for film making
- Greater recognition and more soft power for Wales internationally.



4.3.4 Assumptions and enablers

This ToC is best thought of as a 'best case scenario' of what could happen if MiW activities are carried out. There are a series of assumptions in this ToC, which, if incorrect, question the validity of the rest of this ToC.

Assumptions:

A number of assumptions are being made in the ToC, most notably:

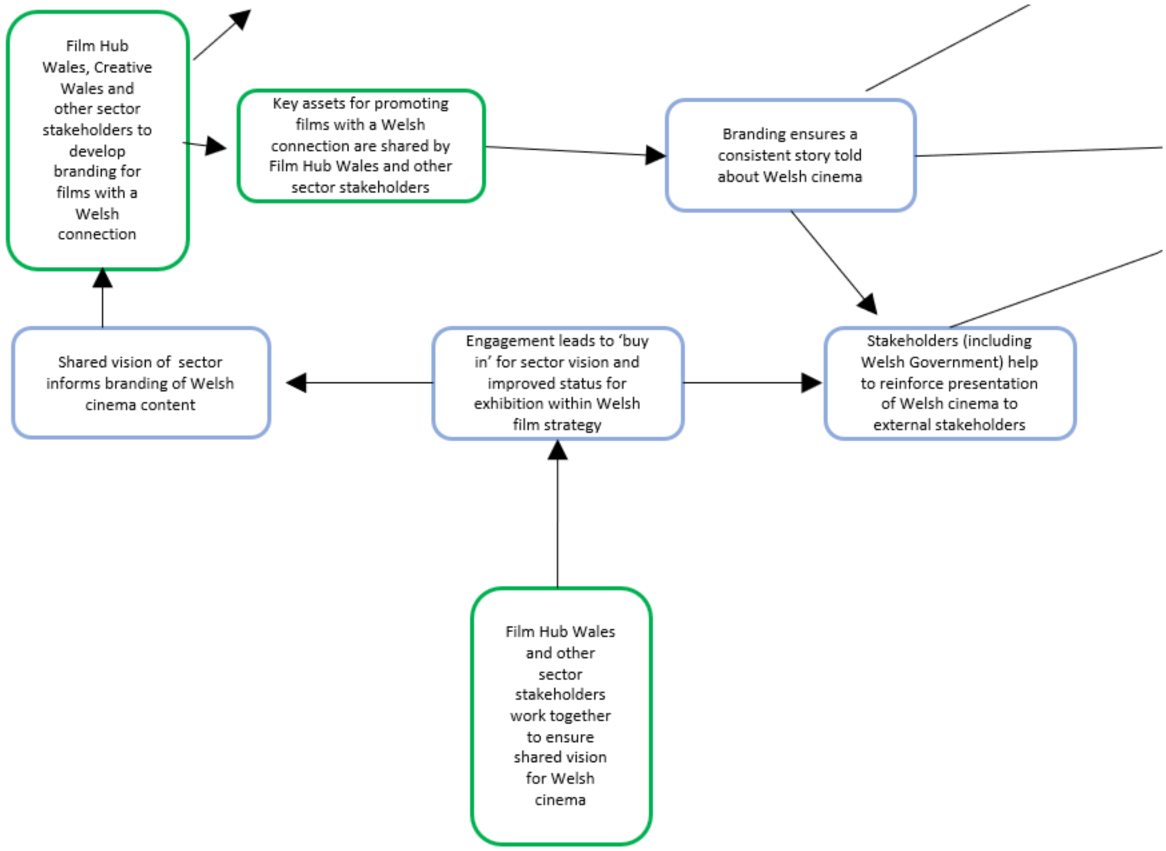
- Stakeholders will agree on the need for doing more to ensure that films with a Welsh connection have a greater profile in Welsh cinemas.
- There is latent demand among audiences within Wales for films with a Welsh connection.
- If engaged correctly, exhibitors would be willing and able to screen more films with a Welsh connection.
- It will be possible for FHW to collect and share data relating to films with Welsh connections.
- There is sufficient quality within Welsh cinema to ensure that greater exposure for Welsh films will lead to improved perceptions of Welsh cinema.
- Increased demand for Welsh cinema content can be met by new and existing talent.

- Inward investment can be attracted to ensure that Welsh cinema projects are properly funded.

Enablers:

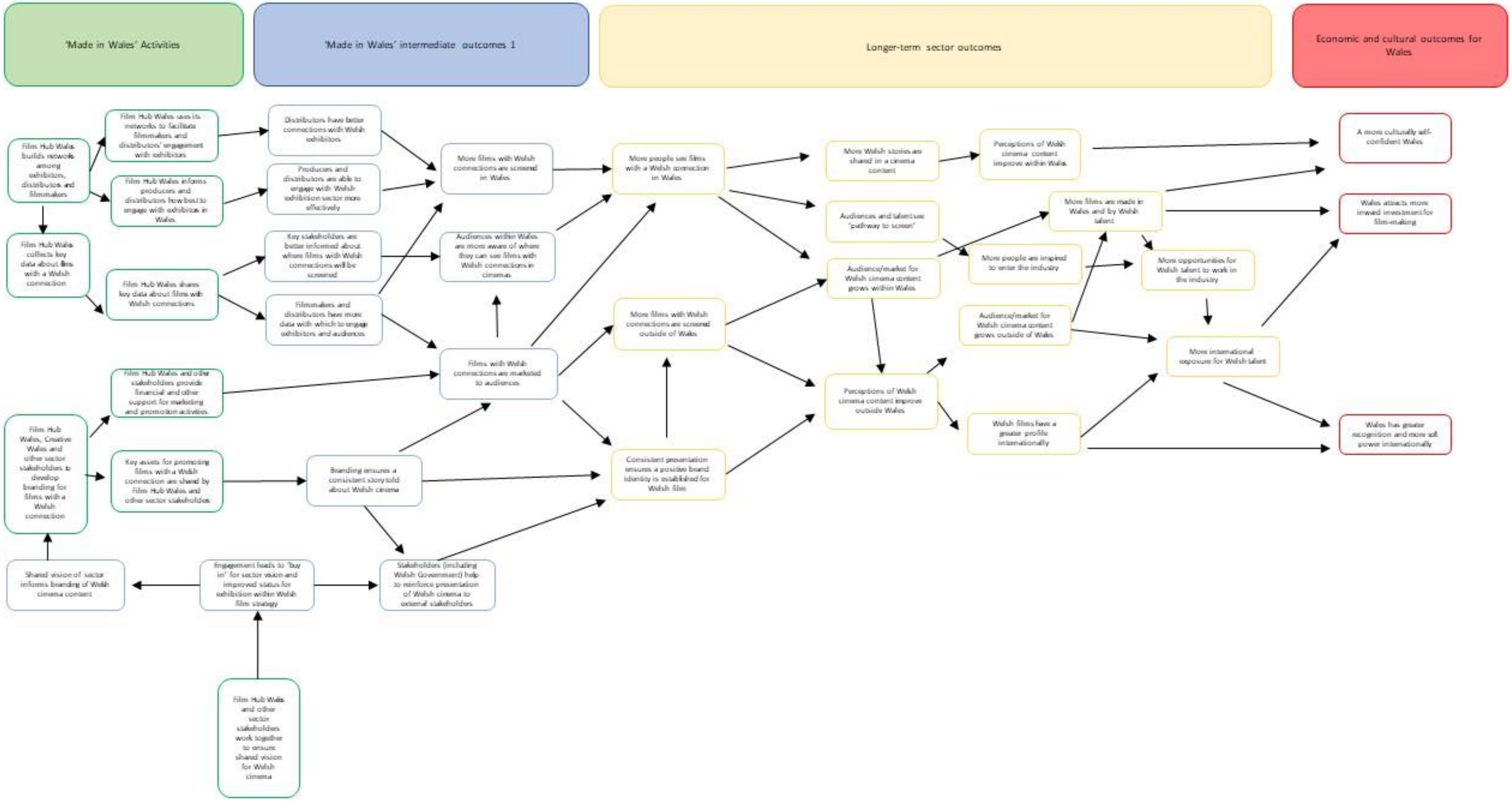
In order to minimise the potential impact of some of these assumptions, there are a number of key enablers that will allow the ToC to happen. As discussed earlier, MiW activities are a relatively small input into the Welsh film sector. It is unlikely that, taken on their own, MiW activities would be sufficient to bring about these higher-level impacts.

A key enabler of all of the things outlined here is a shared vision for Welsh cinema that includes exhibition. Stakeholder interviews indicated a perception that, at times, Welsh film strategy can be disjointed, with a particular tendency for exhibition to be overlooked. A shared vision, with partners pulling together, would be a significant enabler of all the activities outlined above. In particular, this shared vision would inform the branding for films with a Welsh connection, as demonstrated in the bottom part of the ToC, below.



Although this has been represented as an activity for FHW within the ToC, it is unlikely that FHW alone will be able to ensure this kind of shared vision for Welsh cinema emerges. Buy-in from other agencies working in Welsh cinema, as well as Welsh Government and subsidiaries such as Creative Wales, will be enablers of the change that is envisaged here.

4.3.5 Presenting the theory of change as a whole



5 Branding Wales

This chapter explores the way that Wales has been branded elsewhere, including Welsh Government's unified Wales-branding, to understand how MiW might fit with these existing uses of the Wales brand.

Section summary:

- Whereas the classical brand model is owned by the company responsible for branding it, the place brand is something managed (usually by a public organisation) on behalf of a sector or a whole region. In this context, the organisation managing the brand must be sensitive to the way that organisations operating in the same space use the brand.
- Wales is branded in many ways, all of which will potentially affect a 'Made in Wales' brand employed by Film Hub Wales. Most notable among these are the Welsh Government's place branding strategy.
- The phrase 'Made in Wales' is already being used by other organisations, and similar straplines (such as 'Wales Made') are being used elsewhere, something that could potentially lead to confusion between those activities and a MiW brand.

5.1 Introduction to place-based branding

Govers and Go define place branding as "*the representation of an identity, building a favourable internal (with those who deliver the experience) and external (with visitors) image leading to brand satisfaction and loyalty, name awareness, perceived quality, and other favourable brand associations.*"[16] Lecompte et al. summarise place-branding as a process going through three stages:

- First, the key things about that area to be marketed (i.e. the things that set the place apart from its competitors) must be identified.
- Second, the means of projecting these elements to the intended audience needs to be determined.
- Third, the key actions needed to develop the place brand have to be established.[17]

Hankinson identifies a conceptual distinction between place brands and how branding is used elsewhere.[18] Whereas the classical brand model is owned by the company responsible for branding it, the place brand is something managed (usually by a public organisation) on behalf of a sector or a whole region. In this context, the organisation managing the brand must be sensitive to the way that organisations operating in the same space use the brand. In the context of FHW, this requires sensitivity not only to the core identity of Welsh cinema, and therefore the way that Welsh cinema content is perceived, but also the way that Wales is

[16] Govers, R, & Go, F. (2009). *Place branding: Glocal, virtual and physical identities, constructed, imagined and experienced*, Palgrave Macmillan: Basingstoke, p. 17.

[17] François Lecompte, A., Trelohan, M., Gentric, M., & Aquilina, M. (2017). Putting sense of place at the centre of place brand development. Journal of Marketing Management, 33(5-6), 400-420.

[18] Hankinson, G., (2015), 'Rethinking the Place Branding Construct', in Kavaratzis, M., Warnaby, G. & Ashworth, G.J., (Eds.), *Rethinking Place Branding: Comprehensive Brand Development for Cities and Regions,* New York: Springer, p. 25.

branded more widely. To provide some context, this chapter examines how Welshness is currently being used in Welsh film and more generally.

5.2 Wales as a Brand

As outlined above, brands that relate to different activities associated with the same place often influence and depend on each other. As such, it is important to understand the inter-dependent relationship between MiW and other Wales-based branding initiatives. This includes consideration of the main themes used to promote Wales, what sets Wales apart from competitors and the specific concepts used more broadly that can be applied in the branding of Welsh film.

5.2.1 Welsh Government's Place Branding Strategy- Internal/External:

Developing a brand around Welshness has become common practice in Wales and is actively encouraged by the Welsh Government to ensure different industries can benefit from Wales and Welshness as a brand.

The Welsh Government is working to establish Wales as a brand that is recognised internationally.[19] The aspiration behind this strategy is to develop an "*outstanding and defining national brand, to enable them to stand out on the world stage,"* similar to the way that New Zealand, Sweden and Iceland have transformed their global reputation using effective place branding.

Welsh Government aims to create a brand that is *"unifying and can be applied to the breadth of Welsh life."*[20] This approach works by developing a central Wales brand and gradually deploying it across a broad range of sectors and markets. Welsh Government's goal is to establish one Welsh brand rather that lots of little ones. To achieve this, they have created a brand marketing strategy to help support organisations and initiatives looking to utilise the Welsh brand.

The strategy includes:

- A simple and unifying brand vision
- A refreshed identity toolkit to provide cohesion
- A proposed revised digital structure for promoting Wales
- A framework for bringing the brand to life through policy initiatives and projects (e.g. Visit Wales' Year of Adventure initiative).[21]

[19] https://gov.wales/sites/default/files/publications/2019-02/wales-brand-marketing.pdf
[20] https://gov.wales/sites/default/files/publications/2019-02/wales-brand-marketing.pdf
[21] https://businesswales.gov.wales/tourism/sites/tourism/files/documents/YOA-2016-Guide-E.pdf

Brand Wales comes with five core objectives that the Welsh Government sees as being critical to ensuring the brand benefits Wales as a nation. Thus, initiatives that seek to use the Welsh Brand should ensure that their use of it incorporates the following five objectives:

1. Elevates the status of Wales
2. Surprises and inspires
3. Changes perceptions
4. Does good things
5. Is unmistakably Wales.

The Welsh Government believe that a unifying brand strategy that draws together departments, organisations and businesses in Wales will be able to drive greater impact than one that is fragmented. Visit Wales have developed a consistent, integrated brand that is used through their marketing and international promotion. Welsh Government's place branding would be something that MiW should align itself with.

5.2.2 Visit Wales

One of the most prominent examples of Wales branding is Visit Wales. Their entire identity is based on the idea that by advertising Wales and Welshness as a brand they can increase tourism to the country. The image of Wales that they are trying to promote is as follows:

'Wales is a place of natural drama and things to do, from the country's beaches to walking its mountain ranges. The nation's history is told through its ancient monuments and museums. The bold 21st century Wales is here for everyone to discover.'

Visit Wales have transformed the Welsh brand into a commodity that can be advertised and sold to potential tourists, in a way that adds extra values to destinations in Wales. It builds its idea of the Welsh brand through the promotion of the idea that Welsh food, drink, sport, landscapes, culture are all unique and distinct therefore making the idea of experiencing all these features feel more exclusive.

Visit Wales look to establish this Welsh brand through the promotion of Welsh places, attractions, and events. For example, on Saint David's Day they promote not only the history and cultural significance of the event, they also signpost visitors to parades and events that are held across Wales. This means they are not only promoting their idea of an overall Welsh brand but also promoting the places and components that constitute it.

The Visit Wales brand provides some clear brand guidelines for talking about Wales in the context of travel and tourism.[22] This brand is built around five values, specifically:

1. **Authentic:** Wales is the real deal – a country built on the foundations of a proud history and heritage, shaped by a bold landscape.
2. **Creative:** Everywhere you look in Wales, there are bright new ideas being put into action.

[22] https://www.visitwales.com/sites/default/files/2019-08/content-production-wales-brand.pdf

3. **Alive:** A new Wales is emerging. It is inspired by our past and looking towards the future, with responsibility and creativity.
4. **Doing good:** Every one of our actions contributes to a greater good for the whole of Wales. We should not underestimate our ability to do good.
5. **Inherently Welsh with a global outlook:** The aim is to celebrate the best of today's Wales, harnessing our creativity to reveal new stories that complement our country's rich history, beauty, and cultural distinctiveness.[23]

These themes around Welsh history, landscape, creativity, and vibrancy could equally be applied in promoting Welsh film and creating a Welsh film brand.

5.2.3 Food and Drink Wales

Food and Drink Wales are another example of an organisation that is utilising the idea of Welshness to benefit the businesses that it works alongside.[24] One of their main objectives is *"to create and communicate a global reputation for Wales as a food nation"*.[25] One of the most prominent ways in which they are striving to achieve this internationally recognised brand is through the funding of food festivals and events which feature local producers and promote Welsh produce to both the local population as well as visitors from further afield. By creating this Welsh food brand, they are aiming to nurture the idea that food from Wales is synonymous with high quality produce.

Their strategy encourages retailers to start 'Harnessing the marketing value of Welshness'.[26] This is underpinned by research demonstrating that 80% of Welsh customers prefer to buy Welsh products, 74% of shops want to sell more Welsh food and drink and 44% of people are willing to pay more for Welsh produce.[27] This strategy of promoting Welsh produce and encouraging people to support their local economy is cross-cutting and could equally be applied in other sectors such as the film industry.

5.2.4 Foreign direct investment

Trade and Invest Wales is another other area in which the Welsh Government are actively seeking to establish the Welsh brand.[28] They are seeking to establish the idea that the economic infrastructure of Wales is sound and that its workforce is well qualified and skilled meaning that it would be an effective base for businesses. They are looking to synonymise Welshness with an image of opportunity and productivity in order to attract more investment into Welsh businesses, as well as convincing international businesses to consider expanding their business into Wales to create jobs and opportunities. They look to maintain this brand through the promise of support and advice to businesses who have chosen to engage in Wales. They build their Welsh brand identity by attending events based all over the world and by running their own conferences about the benefits that Wales can provide.

[23] https://www.visitwales.com/sites/default/files/2019-08/content-production-wales-brand.pdf
[24] https://businesswales.gov.wales/foodanddrink/
[25] https://businesswales.gov.wales/foodanddrink/future-strategy-planning-food-and-drink-wales
[26] https://businesswales.gov.wales/foodanddrink/about-us/welsh-food-and-drink-numbers-and-value-welshness
[27] https://businesswales.gov.wales/foodanddrink/sites/foodanddrink/files/documents/value_of_welshness.pdf
[28] https://tradeandinvest.wales/

Global Wales also utilise Wales as a brand in their work to promote Wales internationally as a country that offers world class higher education facilities. [29] It is a partnership between British Council Wales, Universities Wales, Welsh Government, and the Higher Education Funding Council for Wales. They have built their brand through arranging visits to Wales and promoting the opportunity to study in Wales to potential students living in other countries, with the aim of using international participation in Higher Education (HE) to build a stronger Welsh economy with cultural relations all over the world. They have built a brand for Welsh higher education which is based on the offer of various ideals including: world class teaching and facilities, low costs of living, safe locations, and an already integrated community of international students. The Global Wales brand aims to be one that offers quality, security, and community, all of which are going to be concerns for prospective students.

5.3 Other use of the "Made in Wales" strapline

It is also important to consider how much the strapline 'Made in Wales' overlaps with other marketing activities. The phrase 'Made in Wales' – or similar phrases – are already being used by other organisations, something that could potentially lead to confusion between them and the MiW brand.

Web-based research indicates that "Made in Wales" is already a widely used term for a variety of different products, services, and events. For example, there is a website for an organisation called "Made in Wales",[30] which acts as a directory for businesses based in Wales. The term "Made in Wales" is also already used as the name of an Awards ceremony that celebrates Wales' manufacturing industries.[31]

On social media, there is the potential for some overlap between uses. For example, the #MadeinWales hashtag on Twitter is used for a variety of purposes. While its use in relation to Welsh screen content is prominent, #MadeinWales is used for a lot of other purposes. For example, many different craft businesses utilise the hashtag to advertise a range of crafts such as pottery[32], toiletries[33], wood carving,[34] and glasswork.[35]

[29] https://wales.britishcouncil.org/en/global-wales-welsh-higher-education-partnership
[30] https://www.madein-wales.co.uk/
[31] https://www.insidermedia.com/event/made-in-wales-awards-2020
[32] https://twitter.com/orielmakers/status/1237764724575608836?s=20
[33] https://twitter.com/HomemadeWales/status/1240233233486405632?s=20
[34] https://twitter.com/lovespoons/status/1237366052058796032?s=20
[35] https://twitter.com/CariadGlass/status/1239185184316174336?s=20

5.3.1 Snapshot- "Cnwd Cymru/Wales Made"

One of the biggest issues surrounding the "Made in Wales" strapline could potentially be confusion with Business Wales' "Wales Made" initiative.[36] Launched in early 2020, the initiative uses a collection of up to 20 products, produce and services *"that are inherently Welsh and of international standard to represent the best of Wales Made"*.[37] The initiative aims to create a collection of products, produce and services that are inherently Welsh that represent Wales with the goal of inspiring Wales' next generation of designers, makers and entrepreneurs, covering the following product/service categories:

- advanced manufacturing
- architecture & interiors
- creative services
- fashion & lifestyle
- food & drink
- leisure & sport
- life sciences & medical
- technology.

Products are selected by an independent panel of Welsh experts if they are inherently Welsh and are of a standard that could compete internationality with other similar products. These are then promoted on an international scale as part of a wider promotion of Wales' brand which focuses on creativity, technology and sustainability. This initiative will continue to be supported by Welsh Government and will be featured on http://www.wales.com/made, which means they are likely to experience wide brand exposure which could cause issues with regards to the "Made in Wales" strapline.

[36] https://www.wales.com/made
[37] https://businesswales.gov.wales/news-and-blogs/news/new-brand-initiative-%E2%80%9Ccnwd-cymru-wales-made%E2%80%9D-%E2%80%93-expressions-interest-sought

6 Branding Welsh Film

This chapter explores the extent to which there is a coherent identity for Welsh film that could be used as the basis of a brand.

Section summary:

- Welsh film identity relates to films produced through the Welsh language or focusing on Welsh culture and stories. There isn't a particular genre or type of film associated with the Welsh film identity in the same manner as you would associate 'Nordic noir' to a Scandinavian film identity.
- The survey suggests that within the sector, there is not a particularly strong idea of a Welsh film identity, and not all associations are positive, with 'low budget' being the word or phrase most commonly associated with Welsh film.
- More positively, the identity brings together films with indigenous performers (actors) and talent (film makers), Welsh stories (myths and histories and fictions) as well as visuals (landscape/historical sites/effects companies/visual art), and texts – in both Welsh and English.
- The stakeholder survey indicates general support for a branding initiative for Welsh film, although this support was not overwhelming. Some stakeholders suggested the need for any such initiative to be well integrated with Welsh film strategy, potentially involving the activities of Ffilm Cymru and/or Creative Wales.
- Most stakeholders reported being satisfied with 'Made in Wales' as a strapline for a Welsh film brand, although some suggested there were potential overlaps with some of the activities discussed in the previous chapter.

6.1 Welsh film identity

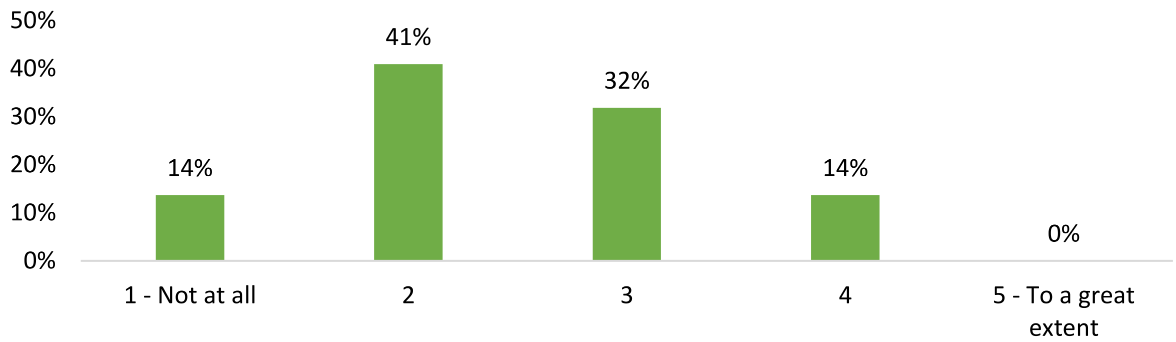
Visibility appears to be an issue for Welsh film. Even though many large international productions are utilising Welsh actors and places in their production, it isn't clear that a comprehensive, distinct Welsh cinema brand exists beyond the limited activity delivered through MiW to date.

Emyr Williams is the Coordinator at the Pontio Arts Centre in Bangor, an institution that prioritises showcasing Welsh language films and Welsh film more generally. Emyr participated in the stakeholder consultation and also engaged with FHW separately to provide his thoughts on developing a brand focussing on Welsh film identity.

The idea of a 'Welsh film identity', according to Emyr, is in one sense elementary. It is simply the fact that Welsh film exists, that it is conveyed through the Welsh language, or focuses on Welsh culture and stories. There isn't a particular genre or type of film associated with the Welsh film identity in the same manner as you would associate 'Nordic noir' to a Scandinavian film identity. This is consistent with comments made by other stakeholders indicating that Welsh film is often very diverse, and the lack of coherence/uniformity is not necessarily a bad thing, although it may contrast with the idea of creating a brand.

The broader survey consultation had a similar line of enquiry. We asked stakeholders on a scale of 1-5 (where 1 is 'not at all' and 5 is 'to a great extent') how much they agreed that Welsh cinema has a coherent and identifiable identity. It is clear from the response that stakeholders do not believe there is a clear Welsh film identity with 55% providing a score of less than 3 (see Figure 6.1 below). It is also worth noting that six individuals felt that there is no identity at all and only 14% agreed that there is a coherent and identifiable identity.

Figure 6.1: Agreement with the statement "Welsh cinema has a coherent and identifiable identity."



Source: Wavehill Stakeholder Survey (n=55)

This data is supported by another aspect of the survey where participants were asked to provide three words to describe what comes to mind when they think of Welsh film content. Generally, there was a lack of consensus amongst responses. The main description was 'low-budget' (six references to this), although more positively there were six references to 'language' and four to 'landscape' as distinct features of Welsh film identity.

Figure 6.2: Main words associated with Welsh film content – stakeholder feedback

Source: Wavehill Stakeholder Survey (n=55)

Nevertheless, Emyr proceeded to describe his understanding of Welsh film, stating it concerns: the films; the indigenous performers (actors) and talent (film makers); the stories (myths and histories and fictions); the visuals (landscape/historical sites/effects companies/ visual art), and the texts – both languages. According to Emyr, it brings together Welsh geography, history, languages, cultural highlights (old and recent) and the actual contemporary day-to-day workings of a creative industry.

Emyr believes that the main Welsh cinematic product is the actors that have come from Wales. He believes that though there has not, traditionally, been a significant export of high-profile films, the volume of such high-profile actors is testament to the strong Welsh cinematic identity that exists. It was recognised, however, that despite having such a wealth of talent to show off and promote Welsh film, there has been a lack of a concerted marketing effort to use it for the benefit of the industry.

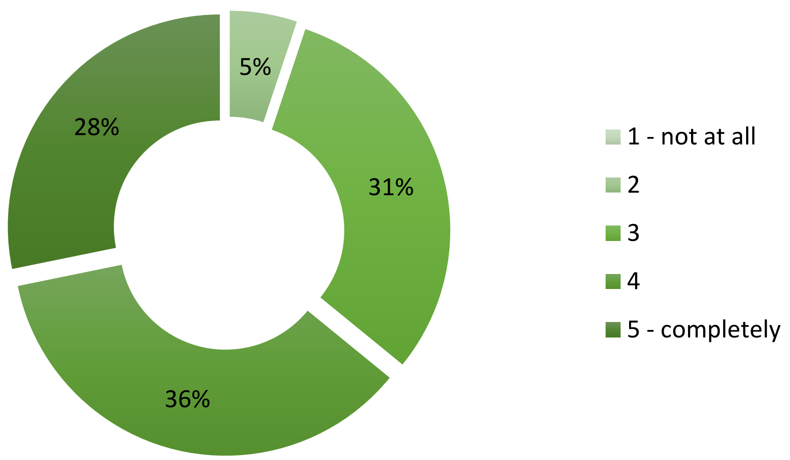
According to Emyr, a Welsh brand to promote a Welsh film identity could have the following benefits:

- The creation of a new version of Wales in the minds of the 'outside world' through a distinct artistic reality to a wider global cinematic community.
- Making Wales and Welsh culture less indistinguishable from the UK by highlighting and separating artistic elements out for more focus and interest (i.e. Welsh films).
- Exploiting culturally specific branding instead of more general 'tourist' branding will lead to deeper interest in Wales – an 'in' point that relies on more than just what people see with their eyes scanning the landscape but rather connecting to something that interests them already on a personal level i.e. cinema.
- It can fill a gap in the general representation of Wales as a cinema nation/country.

6.2 Support for a MiW initiative

Following questions around challenges faced within the industry the survey went on to explore support for a MiW type of initiative to promote the sector (see Figure 6.3 below). The feedback was generally positive, with 28% providing the highest score i.e. completely supporting the idea and a further 36% provided the next highest score. Together, 64% expressed support for the idea. A further 31% were neutral (providing a score of 3) whilst only 5% can be categorised as explicitly not supporting the idea.

Figure 6.3: Support for a MiW type of brand to support Welsh film



Source: Wavehill Stakeholder Survey – available to all respondents (n=39)

Elaborating on this, several potential benefits were identified from investing in a MiW initiative. Twenty of the responses included references to marketing advantages:

"Perhaps branding film as 'Made in Wales' would increase awareness within Wales. As a programmer I find it hard to market and create excitement around films that have a Welsh connection - especially if they are independent or have a lesser known distributor."

"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."

Several respondents explained that it would give Welsh film more of an identity, it would make them more 'packageable' and thus easier for venues who want to showcase Welsh film to find these films. Three respondents cited having a badge/stamp of approval to promote the film as MiW would help to elevate awareness.

Some respondents cited the potential benefits of being associated with other films people have enjoyed under the same umbrella brand:

"The idea of developing brand awareness around Welsh-related films is valid and potentially very valuable in the same way as when you go to Tesco (NZ/British apples etc.). Developing a sense of loyalty (these venues often have very loyal customers) and trying to create an association."

For it to have tangible outcomes, some explained that there would need to be a comprehensive package to tie in these films under a cohesive brand and one stakeholder suggested such a brand would require a brand specialist:

"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. There could be interviews with filmmakers in the guides when a new film comes out. There could also be a major touring retrospective (and online) of the very best of Welsh cinema. Welsh filmmakers compete for small resources against each other and don't see themselves as a cohesive group either."

"If a brand is to work, it should be developed by a brand specialist. Audience specialists should be brought in."

However, others highlighted that there is a risk to have such an association, and thus it would be important to secure quality. One respondent suggested the brand would need to be launched off the back of a successful international, award winning Welsh film to draw in external interest and so that it does not just appeal to the same existing niche audience.

Several of the stakeholders that participated in the in-depth interviews also expressed support for the initiative. One stakeholder explained that it would follow a broader trend where people across the world are taking more interest in localness and small European countries are investing in local language production as a point of difference instead of investing in big Hollywood productions. This trend is said to create the right environment for a MiW initiative.

Another stakeholder suggested that MiW should expand from focussing on independent cinemas to engage with the likes of Odeon, Cineworld etc. too. It was stated that there is an eagerness within venues across Wales to show Welsh films and this type of initiative could help to meet that demand. It could be an important link for small distributors who have not worked with many of the Welsh cinemas before. According to one distributor: *"this could be a good bridge that would help us to engage and prevent us having to get stuff started from scratch."*

The leadership and coordination were highlighted as the most important aspects for a MiW initiative by another stakeholder. It was said that FHW have been *"pushing the agenda"* in recent years to coordinate activity through networking in order to promote new releases. There have been several examples of this with films benefitting from additional screenings, being shown in schools etc. and that was described as the main benefit of the MiW activity to date and a potential area to expand upon.

Relationship with other initiatives

Stakeholders believe that despite being disparate and disconnected at times, there is a lot of activity and goodwill within the Welsh film industry. It was widely acknowledged that, at times, this can seem like a crowded field and that a more joined-up, centralised approach could be more productive.

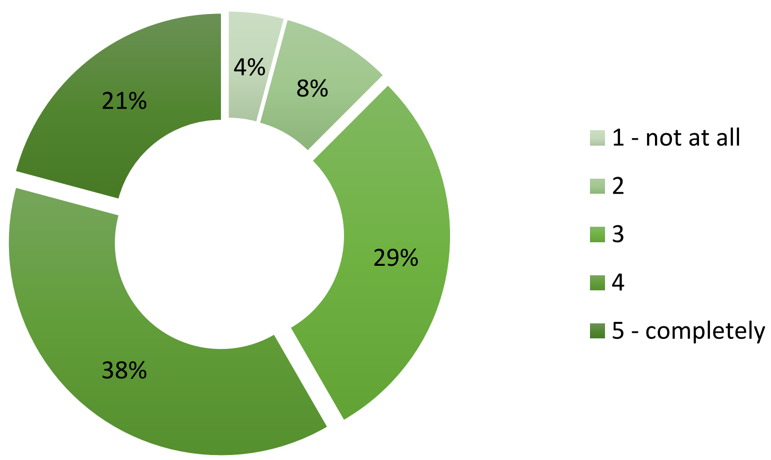
By incorporating a more streamlined, centralised approach, stakeholders believe that Wales could learn from the examples set by countries such as Scotland who try to incorporate everything under one roof.

"The organisation that's responsible for investing talent and developing content should also be the same organisation responsible for distributing and exhibiting. There should be a more joined up approach. At the moment, it's a separate company. Until those fundamental issues are resolved (two main players with miniscule budgets), a solution will not be reached."

Creative Wales is perceived by some stakeholders as having the potential to bring all these aspects of Welsh film under one roof. A strategic approach under them is seen as being inclusive and as having the potential to spearhead the Made in Wales branding.

The stakeholder survey asked respondents whether Welsh film should be promoted within existing creative industry brands such as 'Creative Wales' and, as illustrated by Figure 6.4, respondents were broadly in agreement, 58% selected the two highest scores.

Figure 6.4: Potential for Welsh film to be promoted within existing creative industry brands such as 'Creative Wales'



Source: Wavehill Stakeholder Survey – available to all respondents (n=24)

Elaborating on this, stakeholders explained how Creative Wales may be best placed given that it is Government-led and the resource behind it:

"Just seems the most relevant organisation to help promote under the all-Wales banner which hopefully will link into an international strategy."

"They have an impressive international brand and they are prioritising film as one of their core subsectors over the first few years. In addition to focusing on skills development, they also look at the branding and promotion side of things and they can do that for Welsh screen across the world. Made in Wales could potentially act as a sub-brand, but it would need to align to the overarching brand. It is important that we don't go against each other. People only have a limited amount of time to commit to different initiatives, so we don't want to have to choose between two different branding campaigns and it would also confuse the message. Creative Wales have greater clout behind them."

There were concerns, however, about their ability to secure a long-term profile within the industry, the lack of focus on exhibition, and the potential for film to get lost within the broader brand. As one stakeholder put it:

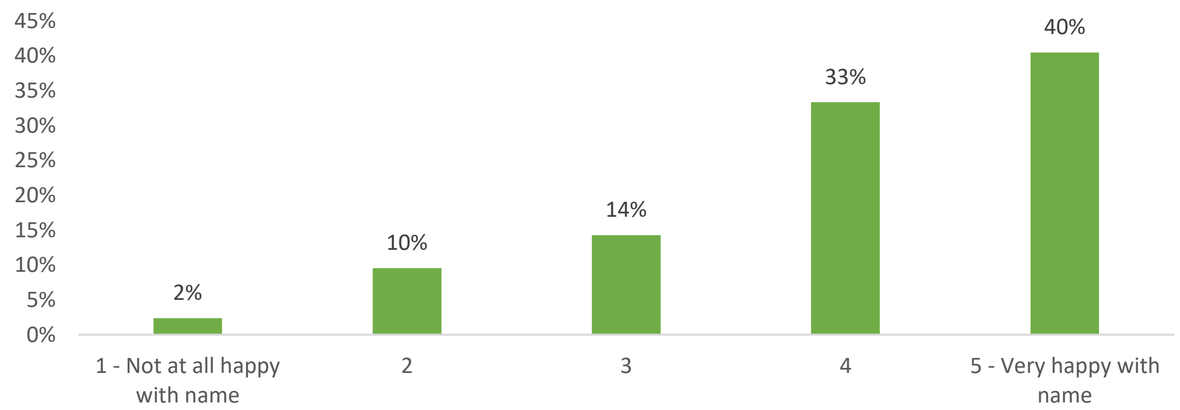
"My feeling is that Creative Wales as well as being new is also too politically flexible - it seems to exist in order to accommodate many different ideas and definitions about art and business and creative economies - which unfortunately can be driven solely by short term, or region specific political goals…. The Welsh Film branding needs to be defined in simple clear terms in order to be successful… I believe it would need a focused 'film' team building it."

Ffilm Cymru is another organisation that could provide this centralised function particularly as their remit already incorporates each aspect of support for the film industry, although to a fairly limited extent. It is clear from this research that the sector would benefit from having greater clarity regarding the remit of various support bodies, and greater coordination across these organisations to ensure that activities are not duplicated by different agencies.

6.3 Feedback on the 'Made in Wales' strapline

During the stakeholder survey participants were asked for their opinions surrounding the Made in Wales strapline. Stakeholders were again asked to score the name on a scale of 1 to 5. In this instance their response was very positive with an average score of 4.0 with 40% providing the highest score.

Figure 6.5: Stakeholder feedback on the name 'Made in Wales'



Source: Wavehill Stakeholder Survey (n=55)

This shows that the stakeholders consulted are generally positive about the use of this strapline to promote Welsh film. Two concerns, however, were raised about its use. The first was around the need for FHW to be clear on what gets included as part of the brand. It was suggested by eight stakeholders that they feel that the name suggests the brand will only include film that has been made in Wales, and not films that include Welsh actors, talents or stories that could also be included in the brand.

The second concern was the potential for there to be confusion around this strapline, particularly given the use of similar straplines by Business Wales’ “Wales Made” initiative and Creative Wales’ activities.

In addition to asking stakeholders about their views of the ‘Made in Wales’ strapline, they were asked about potential alternatives. Eleven stakeholders responding to the survey posed alternative names including; ‘#CreativeCymru’, ‘Cymru i’r Byd (Wales to the World)’, ‘Film Wales’, ‘Screen Wales’, ‘Cinema Cymru’, ‘Gan Gymry’, and ‘I Gymru’. One stakeholder commented that the name is a ‘bit obvious’ and pondered whether there was a ‘more exciting way’ of communicating the brand. However, as noted above, the vast majority of respondents (73%) were either strongly or moderately in favour of ‘Made in Wales’.

7 International exemplars

7.1 Introduction

This section provides case studies of internationally renowned initiatives and agency services that have been designed to grow and promote their countries' film industries. It focuses on initiatives that have a particular emphasis on exhibition, including where they have built a successful 'brand' and created a coherent identity

Three international exemplars are presented which were selected based on recommendations made by stakeholders during our interview and survey consultation. These are Screen Ireland, the Swedish Film Institute and TelefilmCanada.

7.2 Synthesis

Whilst important learning can be taken from these examples, they are all underpinned by significant government investment and without which, it would be unrealistic to expect Wales to adopt the same model. Nevertheless, this section presents interesting practices, including activities that are not investment-heavy, which Wales could possibly draw upon.

It is interesting to note that each of these international examples provide a similar intervention and share similar principles. Each exemplar provides three overarching support packages: firstly, funding for each stage of the film development process (development, production, and distribution); secondly a package to promote the sector both domestically and internationally; and thirdly, an information service. Whilst each exemplar is different and has slightly different emphases, the core aspects of their operation are the same.

Similarities in principles include a focus on supporting domestic talent and companies whilst also incorporating a co-production effort to attract talent from abroad to improve and diversify their industry. There are elements of targeted support in each country too, specifically to address gender inequality across each country, but also to ensure representation of indigenous groups in Canada. Each country appears to view their cultural impact as of equal importance to their economic impact. The Swedish Film Institute has a significant focus on maintaining and promoting Swedish heritage.

One important aspect of the international promotion undertaken by each exemplar is to exhibit their product at international festivals and film markets. Some of these countries have built good relationships with world-leading festivals in order to ensure at least one film per year is selected to feature at these festivals. Screen Ireland and the Swedish Film Institute provide a directory of various international movie markets and/or a directory of distributors on their website as a simple way of supporting distribution of their indigenous films. Telefilm Canada, on the other hand, advertises directories on its website for Canada-based production companies as well as contact details and information about previous co-production projects in order to boost their production activity. Together, these exemplars may provide important learning that can help to inform future support provided in Wales.

7.3 Screen Ireland

7.3.1 Industry overview

The Irish film industry is experiencing a period of sustained growth and is now estimated to be worth over €692 million. The sector also comprises of around 1,960 jobs by way of direct, indirect or induced employment across the economy.[38] Irish film has experienced a period of critical success with films such as Lenny Abrahamson's "Room" receiving seven academy award nominations in 2016, "Six Shooter" winning the award for best short film in 2006 and "The Wind that Shakes the Barley" winning the Palme d'Or.

This success is attributed to consistent Irish Government support: Irish creative filmmaking talent (including writers, directors, producers, casts and crew) which is linked to the first point; and its scenery and array of period buildings which has led to the country featuring in films from 'The Quiet Man' to 'Star Wars'. Thus, industry success is based on a combination of natural strengths alongside concerted government support. This has led to Variety Magazine reporting that *"Ireland has become a capital of film making"* and has now established itself as "*one of the world's most attractive production environments".*[39]

There are two key components to the Government support that will have contributed towards the success of the industry as well as recognition of the Irish film brand internationally. Firstly, a competitive tax incentive known as Section 481 is provided to make production in Ireland a more attractive prospect. This incentive offers tax credit of up to 32% of production costs or up to $72.2 million annually. Secondly, Screen Ireland (formerly the Irish Film Board or IFB) was established in 1980 to maintain and increase industry growth.

7.3.2 Background to Screen Ireland

Screen Ireland are the primary development agency for the Irish film, television, and animation industry. Their mission is to do this by fostering Irish artistic vision, as well as their diverse creative and production talent to grow audiences and attract filmmakers and investment into the country. They do this by setting a strategy and providing leadership for the industry (including through representations to Government); a comprehensive funding programme to develop films, talent and distribution; a mass-promotional campaign to increase audiences; and a research and data aspect.

[38] https://www.screenireland.ie/about/about-the-irish-film-industry
[39] https://variety.com/2016/artisans/news/irelands-rebirth-fuels-film-boom-1201713970/

7.3.3 Strategy

In 2016 Screen Ireland announced their five-year strategy "Building on Success: IFB Five Year Strategy Plan 2015-2020".[40] Its purpose was to build on the recent success and create an environment which promotes and invests in home-grown talent in order to pursue national and international recognition as an industry. This strategy focuses on three main areas: setting out a vision for 2020, building on core strengths and creating strong foundations.

Setting out a vision for 2020

As part of its strategy, Screen Ireland aims to provide the vision and leadership for the sector. Positioned at the centre of industry and artistic leadership for film and screen content production, Screen Ireland seeks to ensure that the environmental conditions allow for both growth and creativity.

Another part of their vision centres around gender and diversity. Screen Ireland acknowledge that there is an issue with gender inequality in Irish filmmaking and screen content especially in the roles of writers and directors. They hope that by prioritising gender and diversity, particularly in their funding programmes, they can create a more diverse pool of creative content that can feature and celebrate the full spectrum of Irish society. This appears to have been a successful strategy. Between 2015 and 2019, funded projects produced with female directors increased from 27% to 43%; projects produced with female writers increased from 27% to 43%; and projects produced with female producers increased from 63% to 69%.

Most importantly, the third and final action point for their 2020 vision is to build audiences for Irish film by increasing access to Screen Ireland-funded films in cinemas, online and on television. This is seen as a critical means to promoting not just Irish film but also Irish culture.

Building on core strengths

One component of the strategy to build on core strengths provides development support for those creating and producing screen content. This is said to recognise that high-quality screen production relies on the collaboration of the creative team involved with the resources and funding of Screen Ireland.

Another focus of this objective is supporting the development of talent and skills in the industry. At the time the strategy was published it was believed that the current funding levels for both skills and training was inadequate and therefore risked limiting the growth of the industry.

Finally, the plan prioritises domestic production and development to ensure that the development of the sector can lead to increased jobs, exports, and promotion of Ireland as a tourist destination.

[40] https://www.screenireland.ie/images/uploads/general/IFB_Five_Year_Strategy_2016-1.pdf

Creating strong foundations

Firstly, Screen Ireland aim to secure increased investment for the industry to create strong foundations. At the time of publication the funding that Screen Ireland received from government had been cut from €20 million to €11.2 million since 2008 and Screen Ireland have therefore strived to protect the industry from further cuts and engage with the government and other stakeholders to seek further investment.

Another sub-objective is the establishment of partnerships for screen production including by working with partners from overseas. The purpose of this is to maintain and hopefully increase the capacity to improve the number of films that are delivered annually. This would allow for a greater range of films to be written, produced, and directed by Irish talent.

Finally, there is a goal of ensuring organisational effectiveness. Screen Ireland realise that in order to provide the services they have promised and to achieve the goals they have set out they need to ensure their own organisation is appropriately resourced, structured, governed and managed.

7.3.4 Funding

Much of the actions described in the strategy will be implemented through the funding provided by Screen Ireland. Its funding programme has four components: Development, Production, Distribution, and Short Film Schemes. These programmes allow Screen Ireland to hone in on a number of strategic priorities, including the focus on developing indigenous talents whilst simultaneously broadening the appeal of Irish film to an international market and bringing in international talent and resource to collaborate with the industry in Ireland. There is a specific focus on using film to promote Irish culture whilst also increasing the array of films to grow the sector. Some of these programmes explicitly target projects that are considered to have the potential to appeal to international markets.

Development Fund

The Development Fund encompasses a range of programmes to enable writers, directors, and producers to develop and prepare a project for production.

Firstly, a Feature Film Development Loans programme enables Irish producers to commission screenplays and undertake all practical work necessary to prepare a feature film project for production. Screen Ireland provides up to €50k in development funding per project under this programme and up to €100k per project across the various programmes within this strand (funding above €50k does, however, require match funding).

Secondly, an Additional Feature Film Development Loans programme is also offered. This is for producers who reach the next step of their development journey, focussing on maintaining momentum during the development process. It is for projects that are already in receipt of Screen Ireland funding and have delivered the first stage of development. Again, €50k can be provided as a maximum and up to €100k is available per project across the different programmes in the strand.

There are separate funding programmes for animation (up to €20k for concept, design, and story work), documentary (up to €15k for concept, research, and story work), live action TV drama (for producing a detailed bible and pilot script), and screenplay development (up to €16k to work with an experienced script editor). Screen Ireland accounts for the year ending 31 December 2017 reveals that ca. €2.2m was provided in development loans.

Production Fund

A further six funding programmes are provided through the Production Fund. These account for a much higher overall investment with ca. €12.4m provided in production loans in 2017.

The Fiction: Irish Production programme provides loans for Irish feature films originated and creatively led by Irish talent. The practical management must be in Irish hands and the projects will generally need to express Irish culture. An equivalent programme entitled Fiction: Creative Co-Production is provided for feature films originating outside Ireland in which an Irish producer is involved as a creative collaborator. The film must employ Irish talent and include third party funding from the leading territory with priority given to projects that utilise Ireland as a film location, depict Ireland or feature Irish talents.

A third funding programme is provided for animated TV series originated and creatively led by Irish talents which again needs to express Irish culture and the practical management must be in Irish hands.

A fourth programme is provided for documentary feature films with a similar eligibility criteria. This programme has a specific emphasis on documentaries with high cinematic production values that can reach an international audience. Producers are encouraged to seek out international partnerships with producers, financiers, sales agents, and distributors to grow production companies and have a realistic plan for the exploitation of the film.

A further programme is delivered for TV drama series originated and creatively led by Irish talents with the aim of creating indigenous TV content with both an Irish and international audience and marketplace in mind. There is again an expectation for the projects to express Irish culture and funding is available up to 10% of the series budget. Priority is also given to projects with a clear commitment to the development of Irish female talent.

Finally, 'Completion' funding is provided for Irish filmmakers to complete a film (which has reached post-production stage or later) which has not received previous Screen Ireland support, shows great theatrical promise and is in need of further funding.

Distribution

Screen Ireland provide a range of distribution and publicity support funding programmes to assist the theatrical release of Screen Ireland-supported feature films. This is delivered through three programmes:

1. Distribution Support - to help defray the costs of theatrical release in Ireland. It is delivered in the form of limited-recourse loans recoverable from a share of revenues from the exploitation of the film. Distributors can apply for funding to cover up to 90% (up to a maximum of €75k) for media space costs, publicity costs (e.g. media screenings, festivals), PR agency fees, and promotional costs (e.g. website).

2. Direct Distribution – grants of up to €15k delivered to Irish producers to help with the costs of a theatrical release in Ireland. Again, limited-recourse loans are provided to cover the costs of DCPs; trailer design and creation; art, posters, and advertising; censorship submission; media space costs; and marketing, publicity and promotional costs.

3. Publicity Support - for the World Premiere of Screen Ireland supported live action, animation or documentary feature films at major A-list festivals.

Screen Ireland does not currently provide funding to support distribution into international markets, but this is something it is exploring for the future.

Short Film Schemes

Finally, two programmes are provided to assist writers, directors and producers working on short films. FOCUS SHORTS funds fiction films that act as a proving-ground for Irish creative talents. It offers an opportunity for producers, directors, and writers to work in a professional environment that will bring their experience up to a higher level and can be seen as a potential steppingstone for future full-length filmmakers. A budget of up to €50k is available.

FRAMEWORKS is an initiative for the support of short animation filmmaking which has produced global, award-winning films to a consistently high standard.

7.3.5 Promoting Irish Film

Alongside the strategy and funding aspects delivered by Screen Ireland, the third key agency function is the promotion of Irish films. Screen Ireland look to promote Irish Film in a range of ways. They attend several international festivals and film markets to exhibit and promote Irish film and animation. They also send members to represent the industry at events such as TIFF, Sundance, and Cannes. One of the key actions set out in the Vision for 2020 document with regards to building audiences is to work with film festivals in Ireland and internationally to support and promote the exhibition of Irish work, in conjunction with Culture Ireland and the Irish Film Institute. The same document states that, with additional funding, the agency could establish a regional exhibition fund for Irish film.

In addition to attending festivals they also run their own festivals both in Ireland and worldwide. These events provide a platform to launch films to the international market and build word of mouth for films prior to their release. Some of the countries which host these festivals include Germany, Australia, Italy, Russia, and the US.

Screen Ireland also support Irish films through funding distribution. They believe that a sound sales and distribution strategy is key to maximising audiences as well as international sales. As part of this approach they have compiled a directory of various international movie markets[41] that have shown interest in Irish film so that those involved may get in touch. They have also created a directory of Irish distributors[42] that can be used to ensure films secure a successful release in the domestic market. They also, of course, directly fund the distribution as outlined in the previous subsection.

The final area in which Screen Ireland are looking to promote Irish Film is through its talent support schemes. They seek to do this by promoting Irish filmmaking talent both through international festivals and through their partner agencies in Ireland and overseas. As a member of European Film Promotion, an international network of organisations promoting and marketing European cinema worldwide, they collaborate with partners to create a sustainable system that provides talent and access to one another.

7.3.6 Information service

Irish Film also collates industry research and data on its website. This includes research that was conducted on the audio-visual sector in Ireland, statistics related to Screen Ireland funding, and importantly data on Irish film at the Box Office. On the latter, the website draws on Comscore data to outline a) the top 10 films (generally) and top 10 Irish films in Ireland from 2010-19 and b) total Irish films Box Office sales and market share from 2010-19 (it ranged from 0.8% to 7%). Finally, the website provides a breakdown of cinema performance in Ireland from 2010-19 using Wild Eye Media data, although this does not provide a breakdown for Irish film.[43] It should be noted, however, that this data is of limited value as it does not reflect how a project has done internationally, its sales in the international marketplace or its life on international platforms such as Netflix. It does, on the other hand, provide insight into domestic performance.

7.3.7 Other forms of support available for exhibition

In addition to the support provided through Screen Ireland, Access Cinema supports the community exhibition sector to access support through the Arts Council of Ireland. Receiving €135,000 worth of funding Access Cinema's mission is to "provide all audiences throughout Ireland with access to the best of Irish, world and independent cinema, via our national network of non-profit and voluntary organisations".[44]

Access Cinema supports its members with:

- film programming advice

[41] https://www.screenireland.ie/promoting/international-markets
[42] https://www.screenireland.ie/promoting/irish-distributors
[43] Wild Eye Media is a cinema marketing firm based in Dublin: http://www.wideeyemedia.com/
[44] https://www.accesscinema.ie/index.php?p=about/what-we-do

- information on technical requirements on all cinema exhibition formats
- delivery of promotional/ support material so groups can actively promote their film programmes locally
- developing and touring original film programmes
- promoting high quality programming, presentation and technical standards for film exhibition

This involves acting as a booker for community cinema venues recognised by the Arts Council of Ireland and working with distributors to provide venues with the best of Irish, world and independent cinema.

7.4 Swedish Film Institute

7.4.1 Industry overview

The most recent data shows that in 2018, 51 Swedish feature length films were released in Sweden (from a total of 284 films released in the country). This compares to an average of eight Welsh films released annually. With Swedish movies accounting for 3,059,822 cinema admissions that year (out of 16,363,368 total admissions for all films), the most popular of these films, "Sune Vs Sune", generated a total of 443,755 admissions country-wide.

Swedish films are also prominent on TV in the country with films such as "Sällskapsresan" (1,304,000), "A Man Called Ove" (1,223,000) and "SOS - en segelsällskapsresa" (1,193,000), as well as seven other films all pulling in over 1,000,000 viewers. The overall market share for Swedish films with regards to cinema admissions is currently at 18.7% which is the highest figure since 2015.[45] The share of releases is 18%, indicating that Swedish and non-Swedish films are equally valued by Swedish audiences.

7.4.2 Background to Swedish Film Institute

Originally founded in 1963 by the Swedish state and bodies within the film industry, the Swedish Film institute supports the production, distribution and screening of *"worthwhile films"* in order to promote and preserve Sweden's film heritage on an international scale.[46] It is tasked by the government to implement film policy in Sweden and has a remit to strengthen film at every stage.

Since 2017 the institute has become solely financed by state funding. Its role is to promote film across the board. They look to support creators from the inception of their film idea to the finished product and then to assist during its launch in Sweden and around the world. The organisation itself is divided into five departments:

- Film Funding
- Film and Society

45 https://www.filminstitutet.se/globalassets/2.-fa-kunskap-om-film/analys-och-statistik/publications/facts-and-figures/facts--figures-2018.pdf
46 https://www.filminstitutet.se/en/

- Film Heritage
- Communications & PR
- Administration.

There are essentially three key components to their operation. Firstly, there is an intensive funding programme to provide direct support for industry along each stage of the film cycle. Secondly, there is a comprehensive programme to promote Swedish film at home and abroad. Thirdly, it offers an important information service including through providing research and data on the sector, an archive of Swedish film to preserve for posterity and a library service for film literature. The first two act to support the growth of the sector and its international appeal, whilst the third is important in the preservation of Swedish film heritage.

7.4.3 Funding

One of the organisation's primary purposes is to fund Swedish film and to signpost filmmakers to other funding streams such as the EU's Creative Europe MEDIA sub-programme.[47] The Institute also provides several other funding programmes related to distribution, infrastructure, education and more. These are outlined below.

Swedish film production

The funding for producing Swedish film targets four principle areas: development, production, automatic funding, and the funding for international co-productions. Assessment of which projects should be granted production funding is carried out by Film Commissioners who are appointed for a limited period.

Development funding aims to develop high quality and attractive film projects that will have an increased chance of being realised by a wider audience. This funding is restricted to producers or established screenwriters and directors who are domiciled in Sweden.

Production funding similarly aims to develop attractive and high-quality film projects with the goal of producing cinematic quality, diversity, innovation and international success. Similar to the development funding, this is restricted to producers domiciled in Sweden but not screenwriters or directors.

The Automatic funding is targeted towards supporting high-quality films with a strong box office potential in the Swedish film market. This box-office potential creates more certainty surrounding the success of investments and can also lead to further private investment for the film (once again this is limited to producers domiciled in Sweden). The box office potential of new films is primarily based on the success of their previous films among audiences across all distribution formats and is decided on by the institute.[48] Although the exact amount of funding available through this method is not stated, in 2016 three films qualified for the fund and received funding equivalent to ca. £5m, £6.7m, and £9.1m for doing so.[49]

[47] https://www.filminstitutet.se/en/funding/funding-from-the-swedish-film-institute/
[48] https://filmtvp.se/wp-content/uploads/2015/11/Future-Policy-and-Strategy-for-Swedens-Film-Sector.pdf
[49] https://www.filminstitutet.se/en/about-us/press-service/press-archive-old/2016/automatic-funding-201605/

The funding for international co-productions however is slightly different to these other funding streams as its goal is to strengthen the collaboration between international producers and Swedish production companies in order to increase the opportunities for international financing and to fund the international dissemination of Swedish films.

Infrastructure

A Cinema Funding programme is provided to cinemas in small towns and arthouse cinemas in larger towns and cities. It is provided to cinema owners for equipment upgrades to ensure that the cinema structure, primarily in small and medium-sized towns, is preserved and enhanced, and that there are cinemas of equal technical standard nationwide. This fund can also be spent on audience work and open screenings of film that has received production funding.

Distribution

Funding is given to Swedish distributors for launching Swedish film among other activity to increase the audience for Swedish film. It includes six types of funds:

1. Annual funding for distribution and screening to increase opportunities for the film range to reach a larger audience across Sweden, and to increase the diversity of the Swedish film repertoire. It is available for distributors, film festivals, associations and organisations within the Swedish film industry who promote distribution and screening.
2. Funding for launching Swedish feature-length film is made available to ensure Swedish film has a prominent position on the national cinema repertoire. It is given to films that have insufficient launch resources in relation to their audience potential and deemed to be able to make a significant difference to the audience results.
3. Funding for audio description and subtitling in the Swedish language is provided to ensure that people with impaired hearing or vision can access Swedish film.
4. Funding for the dissemination of Swedish short film to maximise audience reach within this genre. The fund primarily targets large distribution projects encompassing several films.
5. Funding is also provided for the dissemination of feature-length film nationwide. It aims to encourage distributors to include film on the cinema programme that has little chance of achieving high box office sales. The funding is applied for after a film has been released and is calculated based on how many cinemas have shown the film with low box office sales.
6. Finally, the International Distribution Scheme aims to increase opportunities for Swedish feature and documentary films to obtain international distribution. The grant is available for the release of Swedish films, with a minimum duration of 60 minutes, for distribution outside of Sweden. It is awarded to distributors who are registered and working in markets outside of Sweden.

Education

The Institute also allocates funding to municipalities and schools to provide children and young people with opportunities for quality film experiences and knowledge. Funding is allocated twice a year and can be spent on film-related educational activities, skills development of school staff, initiatives that promote individual creativity, cinema screenings, exploration of the film heritage.

Other funds

An 'Accessible Cinema' funding package is also made available to increase accessibility to film through audio description and spoken subtitles. Around 50 films a year are granted funding to produce and process audio tracks. Cinemagoers with impaired hearing or vision can download an app along with the relevant film's audio tracks for audio description and spoken subtitles so that they do not have to consider particular days and times.

7.4.4 Promoting Swedish film

A key function of the Institute is to promote Swedish film both in Sweden and internationally. This serves to increase the opportunities available for those working in the Swedish film industry.

National Promotion of Swedish Film

The Institute's Filmrummet (The Film Room) is an important mechanism for the domestic promotion of Swedish film.[50] These are a series of seminars, workshops and talks that are held primarily at the Film House in Stockholm, an Institute owned building for film-related activity, but also at other locations across Sweden. Their role is to create a place for discussions, dynamic controversy and to hold forums for explorative processes surrounding film, film policy and cinematic arts. These events often include guests from other countries to add new perspectives to the conversations surrounding film in general in order to expand the thinking surrounding the future of Swedish film.

There are also a series of film festivals that operate in Sweden specifically to promote Swedish film within the country as well as internationally. The largest of these is the Gothenburg International Film Festival which attracted 118,874 admissions in 2018. Other popular festivals of note include the Stockholm Film Festival (51,172 admissions) and the BUFF Film Festival (28,455 admissions). This compares to Wales' largest film festival, the Iris Prize LGBT+ Film Festival, which usually has just over 10,000 admissions. These festivals primarily showcase Swedish films (which receive the highest admissions) but also include films from other Nordic countries to broaden the audience for Swedish film.[51]

International Promotion of Swedish Film

The International Department forms an important part of the Institute with the remit of promoting contemporary Swedish films of all genres outside of Sweden at festivals, markets, and other special events. It does this by working with producers and sales agents to find the most appropriate platforms to showcase Swedish films with international potential both from a commercial and artistic perspective.

One way that they look to achieve this is by striving to ensure that at least one Swedish film per year is selected to feature at what they consider to be the world's leading film festivals: Cannes, Berlin, Venice, Toronto, IDFA and Clermont-Ferrand. Alongside this they also look to run events that coincide with these festivals that celebrate Swedish film.

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[50] https://www.filminstitutet.se/en/watch-and-discuss-film/filmrummet/

[51] https://www.filminstitutet.se/globalassets/2.-fa-kunskap-om-film/analys-och-statistik/publications/facts-and-figures/facts--figures-2018.pdf

The department also works towards the inclusion of Swedish film in smaller film festivals around the world. The Institute is part of two international networks that enables them to do this: Scandinavian Films and EFP (European Film Promotion). It allows them to coordinate their involvement with other organisations and come together to form a bigger presence at festivals.

The Institute also operates a Swedish Film Magazine which is released three times a year alongside major film festivals in order to help inform their international audience about new and upcoming films that will be featuring at international festivals and markets. These magazines are published in a physical format but can also be read online for free in a PDF format.

The distribution funding also, of course, forms part of the package to promote Swedish film at home and abroad.

7.4.5 Information service

The organisation has a particularly strong emphasis on providing a comprehensive information service on Swedish film.

Firstly, they generate research and data to inform their work – this includes publishing analyses, audience studies, cinema statistics and other studies on their website. Annual statistical reports on Swedish film are available which include audience figures, films directed by women, companies distributing films. There are four sections in the latest release (2018) – the first two provide the following statistical information on Swedish film releases and the Swedish film market in total:

- Number of film releases
- Film releases by target group
- Film releases by genre
- Animated film releases
- Share of releases with a woman behind the camera
- Share of releases with a woman/man in a leading role
- Share of film releases that passed the Bechdel-Wallace test[52]
- Top 20 film releases by cinema admissions
- Top 20 film releases by review index
- Top 20 most viewed films on TV
- Admissions to Swedish films at the cinema
- Market share of admissions for Swedish film.

The releases also provide data on the funding of Swedish film and finally presentation of the Swedish Films of the Year. This data allows the Institute to measure its progress against objectives. For example, their funding agreement in 2013 set goals including that Swedish film

[52] The Bechdel Wallace test analyses whether a film contains two named female characters who talk to each other, about something other than men.

should have the highest market share in the Nordic countries and that the number of admissions to cinemas should increase.

Several research studies are also commissioned by the Institute and partners. One such study was produced in 2012 which explored the challenges for industry and government in building sustainable film businesses. The Institute undertook its own comparative research on the public financing of film development and production, which looked at eight European countries. There have also been a series of research studies commissioned or undertaken on issues surrounding gender equality in Swedish film.

Secondly, the Institute encompasses a library service with physical and digital collections of articles, books, journals, DVDs, stills, posters, and databases. The Institute also holds one of the world's oldest film archives, originating from The Swedish Film Society which was founded in 1933 and donated to the SFI in 1964. By now, they have more than 25,000 films in their collections. As part of this work, films are restored, digitised, and made available for screenings and other fields of use in Sweden and internationally.

Since 2014 the SFI has had a digitization department where they digitised approximately 500 films over a five-year period, funded through a €4.2m grant from Government. They have had their own photochemical laboratory since 2012 to carry out analogue duplications and restorations. Together, the archive, library and digitization services work in tandem to preserve films and give access to Swedish film heritage for posterity.

7.5 Telefilm Canada

7.5.1 Industry overview

The most recent figures show that in 2018 the Canadian film industry, colloquially known as Hollywood North, generated $1.9 billion in operating revenue, a 5.7% increase from 2016 with the majority of the revenue being contributed by Ontario (42.7%).[53] Production values for the industry have been experiencing a period of growth, growing on an almost yearly basis from $2 billion in 2005 to $3 billion in 2018, with a peak production value of $3.3 billion in 2017.[54] In 2019 it was estimated that Canadian film and television production prior to the COVID-19 pandemic was employing the equivalent of over 180,900 people.[55]

7.5.2 Background to Telefilm Canada

Telefilm Canada's aim is to foster and promote the development of the audio-visual industry in Canada with a driving ambition to bring Canadian creativity to the world. They describe themselves as a champion of Canadian talent and stories who are playing a leadership role through financial support and initiatives that contribute to the industry's commercial, cultural, and industrial success.[56]

7.5.3 Funding

Financing Canadian film is one of the key functions of Telefilm Canada. They provide financial support to projects at all stages of feature film-production and marketing both in Canada and internationally through their Canada Feature Film Fund. Some of this funding is centred around increasing the amount of Canadian films that are produced by funding development and production whereas other areas focus on raising the profile of existing Canadian film.

Development

This fund supports Canadian production companies looking to finance the development stage of their feature film. It provides a repayable fund at a minimum of $15,000 and maximum of $200,000. Eligible candidates are production companies that are Canadian controlled corporations and key members must be Canadian. Applications are reviewed and arranged into two financing mechanisms. Clients with an established record can access finance which is attributed automatically based on the total score of the applicant. Selective financing takes place in parallel to the automatic financing and is for clients who are yet to achieve a score sufficient to be eligible for automatic financing. Funding is also set aside for projects by Canadian filmmakers from indigenous communities.

[53] Statistics Canada, The Daily – Motion picture theatres, 2018.
[54] Canadian film and TV production volume in Canada 2004-2018
Published by Amy Watson, May 15, 2019
[55] https://telefilm.ca/en/studies/profile-2019-economic-report-on-the-screen-based-media-production-industry-in-canada-2019
[56] https://telefilm.ca/wp-content/uploads/strategic-plansummary.pdf

Production

The production fund seeks to improve the performance of a greater number of feature films, thereby ensuring the long-term viability and success of the Canadian audio-visual industry. It prioritises production companies with a track record of success at the commercial (box office results and other sales), cultural (nominations and awards), and industrial (private sector and international contribution) levels, as measured by the companies' track record. It also, however, aims to support a balanced portfolio of projects reflecting the diversity of voices and gender parity in the Canadian audio-visual industry. The same eligibility criteria are applied for this fund but must be able to demonstrate the experience, level of expertise and financial resources necessary to complete the production. The project must be budgeted at no less than $250,000.

The evaluation criteria for both production and development funds are based on factors such as track record of the production company and creative team, creative elements of the proposed project, confirmed market interest, financial feasibility and promotion strategy/ audience reach potential.

Marketing

Telefilm offers marketing funding to films as long as they can prove that: the distributor or producer is Canadian, that company or person holds the distribution rights to the film and that the key personnel working on the film are Canadian citizens or permanent residents. The marketing funding aims to increase theatrical accessibility and enhance opportunities for digital distribution of Canadian films. Financing is available for marketing and promotion costs, including, but not limited to, the creation of materials such as posters, teaser trailers and test screenings, test marketing and campaign creation, prints and advertising, audience research, versioning/sub-titling and on-line marketing activities.

Promotion

The promotion programme follows the same eligibility criteria as the marketing funding. The role of this programme is to provide financial support for Canadian film's promotional activities including events open to the general public and activities that are aimed at industry professionals. Qualifying events include film festivals, national award ceremonies, conferences, recognition support activities and business development activities centred on promotion.

The Theatrical Exhibition programme is for Canadian commercial exhibitors and is intended to support the programming of Canadian films in theatres across Canada and to foster public access to these works. The funding is based on the number of Canadian films exhibited by the applicant during the preceding year, the number of screenings and the number of admissions to each of these films. To be eligible, candidates must be a Canadian commercial exhibitor with a ticket and box-office reporting system that complies with audio-visual industry standards and a track record of exhibiting Canadian films.

The final financial support programme that Telefilm offers in order to raise the profile of Canadian film is its export support programme. This funding helps support companies who have acquired exploitation rights for eligible Canadian feature films in selected countries. The funding can be used to cover costs of things such as marketing, travel and subtitling up to a maximum amount of $90,000. Some of the countries included on the list of those eligible include Australia, Brazil, Japan, Mexico, the United Kingdom, and the United States.

Other funds

The Talent to Watch programme provides up to $150,000 automatic funding to projects directed by an emerging director having previously directed a short film that has won a prize at a recognized film festival. It aims to support emerging filmmakers, accelerate their career development, and to allow them to develop an expertise in digital marketing and promotion of audio-visual projects.

Companies operating in the Canadian audio-visual industry can apply for an innovation repayable fund for projects which are not covered through other funds but contribute towards Telefilm's objective of stimulating demand and access to Canadian audio-visual content. Such projects may include promoting new technologies, an innovative strategy for promoting, producing, distributing etc.

7.5.4 Promotion

On top of the financial support that is offered, the organisation also offers some non-financial support to raise the profile of Canadian film both in Canada and internationally. One of these forms of support is the work that they do to ensure "Canada's productions and talent shine brightly at festivals and markets around the world".[57]

Festival and Market Promotion Support for Businesses and Films

Telefilm Canada work with major international film festivals to promote Canadian productions who have been selected to take part. This relationship between them and festivals allow them to attempt to position Canada as both a creative and commercial partner within the film industry. One aspect of this relationship is their pre-selection screenings in Montreal which they offer for films preselected for festivals such as Cannes, Sundance and Berlin. These private screenings for festival programmes provide significant exposure for Canadian films to festival decision makers.

They also offer participation in "consolidated shipments" to festivals which is an opportunity to be involved in a bundle of Canadian productions that are shipped to festival programmers and decision makers so that they may be viewed quickly, thereby increasing their chance of success. Festivals such as Venice, Rotterdam and Tribeca have received these shipments.

[57] https://telefilm.ca/en/festivals-markets

The Canada Pavilion is another scheme which is designed to provide a destination at international festivals that brings together businesses specialising in content production and distribution. The goal of this meeting hub is to foster the development of co-production and co-venture opportunities between international organisations and those based in Canada.

Festival and Market Promotion Support for Canadian Talent

In addition to what they offer companies and productions, Telefilm also offer a variety of services to encourage the professional development of Canadian talent especially at international festivals and markets. The perceived benefits of these different support avenues are; opportunities to develop their own knowledge and thinking, the opportunity to develop a network of contacts on both a national and international scale, and the opportunity to implement what they have learned into carrying out their projects.

As part of this commitment to talent development, Telefilm have an agreement with several international training programmes. Their agreement with ACE (which usually only supports independent European producers) allows two producers from Canada to attend the programme. Training is delivered through workshops and seminars that cover a wide array of relevant topics and offer a chance for attendees to network with major international industry players. They also offer entry to the Rotterdam training and networking workshop that is held during the Rotterdam International Film Festival and is designed to benefit emerging producers.

Access is also offered to No Borders, an international film funding forum that is held in New York during Independent Film Week. This forum is designed to allow established producers and directors the opportunity to present their work in a one-on-one environment to potential investors and partners from the United States film market and other international organisations.

Film Circuit

Telefilm Canada works with TIFF to promote an initiative called Film Circuit. Film Circuit is TIFF's national outreach programme, engaging domestic grassroots networks and community partnerships to bring the best of Canadian and world cinema to communities across the country. It aims to give communities access to films they might not otherwise get to see and contributes to the growth of the Canadian film industry by building an audience for Canadian, independent and foreign language films.

Film Circuit supports Canadian filmmakers and industry guests to travel across Canada to introduce their films and participate in Q&A sessions.

Canada Now

Telefilm Canada works with the Canadian Government to support a programme called Canada Now. Canada Now is a way of promoting talent and getting international recognition for Canadian film. Focusing on Canadian Government key priority territories, including Mexico, the UK and the USA, the initiative promotes discoverability and access to Canadian films as part of wider efforts to raise the profile of Brand Canada.

Canada Now is delivered by curating a series of 'the best of Canadian cinema', tailored to the territory in which it is exhibited. Canada Now bundles up fees and negotiates them *en bloc* for arthouse cinemas within the target territory. The programme also works with stakeholders on the ground- such as local trade missions or expat societies- to organise Canadian film festivals in the target countries. The goal of this is to raise the profile of the individual films and the talent responsible or them within the territory, as well as to support wider awareness of brand Canada.

See it All

To promote visibility of Canadian film, Telefilm Canada launched SeeitAll, a database that shows users where they can watch Canadian films, either online or in the cinema. See it All has been developed off the back end of IMDB, and trawls the links of films connected to Canada. It is automatically updated.

7.5.5 Co-Production

Co-production is another important area for Telefilm. It is for joint film and television productions that are shared between Canadian and foreign producers. To support this, they have established treaties and memorandums with close to 60 countries in order to promote the advantages of co-production.

They offer guidance on their website for producers operating outside of Canada who are interested as well as those producers operating in Canada looking to branch out. In order to promote these partnerships, they suggest that Canada can offer international producers the following:

- Coproduction treaties or agreements currently in force with nearly 60 countries
- Access to public funding (if applicable)
- Access to different tax credits
- A large pool of internationally recognised creators and technicians
- Four seasons and a multitude of locations and landscapes
- The opportunity to work in both official languages of the country (English, French).

They suggest different associations,[58] cultural agencies and funding agencies that can be used to support co-production. They also provide access to location notes about various parts of the country so that international producers can gain a better idea of where they can find what they are looking for. This gives potential producers all the information they need in one location and simpler to find than it may be for other, similar countries.

Telefilm also advertise directories on their website for both Canadian based production companies as well as the contact details and information about previous co-production projects. Both lists are updated annually and provide potential co-producers with all the relevant contact details and information they may need to know.

[58] https://telefilm.ca/en/coproduction/coproduce-with-canada/

7.5.6 Information service

The final form of support that Telefilm provides is research where they host and publish statistics about marketing, distribution, production as well as others. This serves to inform industry on what is working as well as what is not in order to help promote good practices.

They also publish guides and reports regarding different aspects of creating films such as ethics, creative impact and the economics of the industry. This again is hoped to provide a positive impact on how organisations operate and prompt them to follow good practice and become more successful.

Telefilm also undertake consultations with industry stakeholders with regards to the challenges and changes that the industry is facing, such as the Commitment towards Gender Parity for 2020 research. As part of their role, they engage with the wider industry around these challenges and opportunities, including sending personnel to industry events to address any queries.

Telefilm have created what they call the success index,[59] an annual summary of commercial, cultural and industrial perspectives. This was created because of the perceived deficiencies of box office figures as the only mechanism to measure the success of films. This index is designed to provide a better illustration of industry realities and dynamics. They also use this success index on the individual films that they support in order to get a better idea of what is working.

7.1 Case Study Matrix

To summarise the findings of these case studies, a case study matrix has been produced. Please note that findings are not directly comparable in all fields and are provided for illustrative purposes.

[59] https://telefilm.ca/en/industry-resources/success-index

	Wales	**Ireland**	**Sweden**	**Canada**
How does the territory structure its approach to Screen e.g. *one body or more, how governed and reporting to which part of its Government?*	**A variety of agencies including:** • Creative Wales via Welsh Government*, • Ffilm Cymru Wales / BFI Network Wales, • Film Hub Wales, • 50+ wider partners including Into Film, Bafta, Bectu and Screen Alliance Wales. *Filmmakers and distributors may also apply for support from the BFI, as the UK body for film.	**A variety of agencies including:** • Screen Ireland, • Access Cinema, • Irish Film Institute, • Wider partners including the Irish Film & Television Academy	**One main body:** • The Swedish Film Institute	**One main body supporting films from production through to exhibition, with additional cultural and provincial-level bodies:** • Telefilm Canada, • The National Film Board of Canada, • Canada media fund, • Canada arts board, • Provincial-level film boards.

Estimated industry worth/ jobs:	GVA[60] of £175m (2018 figures) / 1,500 jobs[61] (2015 figures) WG are looking into processes to aggregate data on this level in future.	GVA of £692 million / 11,960 jobs[62] (2016 estimate)	*GVA/GDP and employment estimates for the Swedish film sector are not publicly available.*	GDP impact of CAN $24.38 billion/274,210 jobs[63] (2018 estimate)*
Exhibits Films at international markets:	• FFCW support on festival strategy and distribution deals (where appropriate), • WG offer support for export and attending overseas events and are exploring gaps in demand.	• International strategy planning, • Mass-promotional audience campaigns, • Attending and running festivals domestically and worldwide to promote Irish film.	• An international department, maximises exposure of via film festivals, markets and events, • At least one Swedish film per year to be selected at the leading festivals, • Publishes the magazine Swedish Film.	• Promotes Canadian productions at festivals, • Facilitates access to pre-selections at international film festivals via the Montreal film festival, • Offers consolidated shipments to film festivals organisers, • Works with the Canadian Government to promote Canadian films in priority export markets through Canada Now, • Export Assistance Program offers financial support to

[60] *N.B. The GVA figure is calculated for the wider Information and Communication SIC code. The employment figures are calculated for 5-digit SIC codes for: Motion picture production, distribution and projection activities; Motion picture, video and television programme post-production activities;*
[61] https://www.nomisweb.co.uk/query/asv2htm.aspx
[62] https://www.chg.gov.ie/app/uploads/2018/06/economic-analysis-of-the-audiovisual-sector-in-the-republic-of-ireland.pdf
[63] https://cmpa.ca/wp-content/uploads/2019/03/Profile-2018.pdf

				distribution companies to promote Canadian films in selected foreign territories.
What's the budget and how is it split?	• FFCW £2m+ (Arts Council delegate via Department of Culture, Media and Sport and BFI) • Film Hub Wales £210,000 100% to exhibition • Creative Wales £7m (2020) via Welsh Government	• Screen Ireland €17.2m (2019) via government Department of Arts, Heritage: Production c. €12.5m Development c. €2m Training c. €750k Marketing c. €650k • Access Cinema received €135k strategic funding from the Arts Council (2018).	• *SFI* €60m (2013) circa 50% via Government and remainder from levy on cinema admissions, private and public TV companies,	• TC (2020-2021) via Canadian Government projected at c. CAN$128m: Production c. CAN$60m Development c. CAN$5m Promotion: c. CAN$10m Marketing: c. CAN$8m
What funding is available to support distribution and exhibition of domestic films?	• FFCW offer Ad hoc distribution support to films supported via development and/or production funds, where there is a non-traditional release proposed or added	All films supported by Screen Ireland receive distribution support, including: • Up to 90% recoverable distribution loan to facilitate theatrical releases; • Publicity support for the world premieres,	The Swedish Film Institute funds: • Swedish feature launches; • Audio description and subtitling; • Dissemination of Swedish-language shorts;	Telefilm Canada supports marketing and distribution for all of the films they support, including financial assistance depending on need: • Marketing and promotional (enhance theatrical accessibility and digital distribution),

	value via Magnifier approach. • WG are currently reviewing future funding models post Covid and support may be available via the Global Screen Fund currently being considered at DCMS level.	• Members sent to represent at events such as TIFF, Sundance and Cannes, promoting Irish films to film festival programmers. Access cinema works with community cinema venues to curate and book films- including Irish films- for Ireland's community cinemas. Screen Ireland are working with Usheru on their Home for Film platform to promote Irish films internationally.	• Exhibition of feature-length films that have limited box office potential, • International release of Swedish feature and documentary films.	• Consolidated shipments to the organisers of film festivals, • Up to $90,000 grants to films to cover expenses including marketing, travel and subtitling. They also work with TIFF to support Film Circuit, TIFF's outreach service, the aims of which include improving the domestic visibility of Canadian films.
What sector data do screen support agencies make available?	At present, there is no comprehensive set of data made available publicly through Welsh screen support agencies. However: • FFCW collate sensitive budget data, finance, awards, festivals, co-productions, spend, benefits, trainees, jobs,	Screen Ireland: • Collates domestic film insight data on its website (Comscore and Wild Eye Media data), a) top 10 films b) top 10 Irish films in Ireland c) total Irish films Box Office sales and market share cinema performance.	The Swedish Film Institute: • Domestic and international audience figures for Swedish film, • A database of distributors, • Research outlining cultural indicators relating to Swedish film (e.g. the number of films by female directors and the number of films that pass the Bechdel-Wallace test, children's	Telefilm Canada: • Researches marketing, distribution and production of Canadian film, • Created a 'success index' summarising commercial, cultural and industrial performance of Canadian films each year (measures success beyond box office figures including awards and critical acclaim).

	equality for reporting purposes. • WG collate full budget and breakdown of the welsh spend. • FHW have undertaken benchmarking exercises for Welsh film and release where data restrictions allow. • There are few or no distributors working from within Wales but the ICO offer a list of UK distributors online.	• International movie markets directory; • Irish distributors directory;	engagement with Swedish films).	• Hosts Seeitall, a service which lets users find out where they can see Canadian films online or in the cinema.
Do they offer funding to create accessible formats:	Not currently available. Inclusive Cinema (via Film Hub Wales) are working with the FDA to secure accessible formats for key releases.	Funding is not currently available to create accessible formats through Screen Ireland. The Arts Council of Ireland provides support for accessibility through individual grants to venues.	The Swedish Film Institute's 'Accessible Cinema' project offers grants for the audio description of c. 50 films per year.	Telefilm Canada require closed-captioned versions (in English and French). 'Talent Fund' projects must also include a described version. Subtitling costs can be included in the $90k promotional grant.

To what extent do the Agencies implement brand, if at all:	Creative Wales use the 'This is Wales' or 'Wales Made' campaign but there is no specific drive towards film content.	While supporting Irish film domestically and Internationally, Screen Ireland does not explicitly seek to brand Irish film. It is currently reviewing its brand strategy.	The Swedish Film Institute uses a catalogue, called *Swedish Film*, to promote Swedish films to international audiences.	Telefilm Canada does not operate an audience-facing brand, but does use branding through Canada Now, its RDV Canada website and branding is a big part of TIFF.

8 Conclusions and Recommendations

This report gives a detailed account of the considerations that need to take place to increase engagement with Welsh film. There are both cultural and economic reasons why this will be beneficial to Wales. Culturally, Welsh stories are important for improving the cultural self-confidence of Wales and raising the country's profile internationally. Economically, the creative industries are a key, fast growing sector in Wales and there is potential for Welsh film to play a much bigger part in accelerating that growth further.

Realising the ambition of increasing engagement with Welsh film could result in a range of economic and cultural benefits for Wales such as selling Wales to the world, resulting in film tourism and inward investment, providing greater opportunities and more recognition for indigenous talent, and creating a more culturally self-confident country. The international exemplars shown in this report reveal that other countries view the cultural impact of their film industry as of equal importance to their economic impact.

8.1 Barriers to growing Welsh film

Much of the research in this study focussed on exploring what is preventing increased audience engagement with Welsh film. It was clear from consultations with stakeholders across the sector that part of the answer may lie in a lack of joined up thinking and clear strategy for growing Welsh film. The support infrastructure for Welsh film was described as a 'crowded field' with several organisations doing different things to support the sector, some of whom have overlapping remits which creates a risk for muddled thinking and duplication. This is completely different to the approach undertaken by some of the successful international film industries highlighted in this report where there is more of a coordinated approach and often with most activity sitting under one roof.

It also appears that the support provided at different stages of the film development and promotion journey is not as balanced, or as integrated, as it might be. Several stakeholders consulted during the exercise highlighted the value of a more integrated strategy for Welsh film, and particularly one that included exhibition. More integrated approaches are taken in the three case studies explored in this report: Screen Ireland, the Swedish Film Institute and Telefilm Canada, all of which fund exhibition activities as part of their national film strategies.

It should also be noted that the screen industries in each of these countries are backed by intensive government investment, something which does not appear to be replicated in Wales. This lack of investment and coordinated support are likely to cause significant barriers with visibility and the ambition of increasing audience engagement with Welsh film.

Perhaps more fundamentally, the research also suggests a lack of clear Welsh film identity to sell to Wales and the world. The majority of stakeholders consulted in this exercise disagreed with the statement that 'Wales has a coherent and identifiable film identity'. Likewise, when stakeholders were asked to describe what they associate with Welsh film, not all of the associations were positive.

Barriers to visibility for Welsh film can be grouped into three interconnected categories: demand (i.e. audiences’ interest in Welsh film in comparison to blockbuster films); supply (i.e. the quality of Welsh film); and structural (i.e. the support available to produce and promote quality Welsh film). Clearly, these barriers are circular. If support is improved, the quality and promotion of Welsh film is likely to improve, thus resulting in more engagement and increased demand.

Whilst the main barrier cited by stakeholders is the competition from ‘more popular’ films made elsewhere; most stakeholders also stated that they do believe audiences in Wales are generally interested in seeing screen content with a Welsh connection. This would suggest that there is an appetite for Welsh content and the lack of engagement may be more to do with the quality and quantity of the Welsh film offer. This, however, reiterates the importance of a holistic approach to supporting film in Wales, with the effectiveness of support to exhibition depending on the quality of Welsh films that are being made.

Wales also lacks the infrastructure to promote Welsh film at scale. Whilst Screen Ireland provides a directory of indigenous distributors on their website, Wales has no major distributors to promote at all. Similarly, whilst other countries use high-profile, investment-heavy film festivals as a launchpad for their indigenous films, the Welsh film festivals are much smaller in terms of investment and profile, and tend to be specialist film festivals (e.g. Abertoir and the Iris Prize LGBT+ Film Festival). Welsh films are often developed at small-scale and thus need support to boost the promotion of their product – the survey found that most producers had inadequate marketing plans and investment in place for their release

The other infrastructural deficit is that in information. There is, at times, a lack of communication between different parts of the film industry resulting in a lack of awareness of Welsh film releases and thus negating the ability to promote these releases. Additionally, all other international exemplars highlighted in this report have an information service featuring as one of their three core pillars of support. This typically includes data on the performance of their indigenous films, audience studies, annual statistical reports, a list of screenings; whilst some also provide digital collections, film archives etc. Most of these do not appear to be provided by Welsh bodies and several stakeholders cited the lack of data on film performance as an issue. As one stakeholder put it, this lack of intelligence means that it isn’t possible to accurately evaluate how films have done to inform decision-making around the type of films that should receive investment going forward. It also means that it isn’t possible to understand the economic impact of the sector from the support provided.

8.2 The need for a MiW initiative

Against this backdrop, we have identified the following four activities that could help to address some of these barriers. Section 3 provides a detailed overview of these activities and the outcomes they are designed to generate.

1. Networking and ensuring better engagement between different parts of the film industry
2. Collecting and sharing key data
3. Supporting the marketing and promotion of films with a Welsh connection
4. Working with sector partners to ensure that exhibition is better represented within Welsh film strategy.

Recommendation 1: The findings of this report should be shared with key stakeholders to inform ongoing discussions about how to develop an integrated Welsh film strategy that includes a role for exhibition.

8.2.1 Developing a coordinated offer

Carrying out a series of comparison studies of support for the sector in Ireland, Sweden and Canada in this study has highlighted that support for the Welsh screen sector is relatively disjointed compared to these international comparators. Each of these three international examples show an integrated approach to supporting their cinema sector, with investment in production, distribution and exhibition, all working towards the same economic and cultural objectives. Notably, these initiatives have often been driven by government involvement, and have been accompanied by substantial government funding, which is considerably higher than the funding currently provided by Welsh Government for the screen sector. What will be achievable for the Welsh film sector will be heavily influenced by the extent to which the Welsh Government engages with and drives the process.

This report has attempted to provide a roadmap for what needs to take place to reach the stated end goal of increasing audience engagement to grow Welsh film and thus increase the sector's economic and cultural impact on Wales. However, it is not for this review to determine which organisations should do what and which activities should be delivered under the MiW banner or independently of it. Nevertheless, this report has highlighted the importance of ensuring that the future support offer is coordinated between relevant parties.

It was widely acknowledged in stakeholder interviews that, at times, support for Welsh film can seem like a crowded field and that a more joined-up approach could be more productive. Learning from the examples set by Ireland, Sweden and Canada, which have integrated strategies including exhibition alongside production and distribution.

Recommendation 2: The development of a more integrated screen strategy for Wales, recognising the importance of investment in production, distribution and exhibition would potentially overcome some of the challenges facing the Welsh screen sector.

Once key stakeholders are agreed upon the contents of the strategy, there should be a formal and agreed framework for relevant stakeholders to operate within. Stakeholders should have clearly designated (and complementary) roles and responsibilities. Consideration should also be given to simplifying the way that support is presented externally, potentially through a public-facing umbrella initiative.

8.2.2 Developing an information service

This review attempted to scope out what data exists on Welsh film. The feedback from stakeholders suggests the primary issue is that data on Welsh film is not currently being collected. Screen Ireland use Comscore data to assess Irish film performance at the Box Office. However, one stakeholder suggested that Comscore does not collect data from independent cinemas which is likely to leave big holes in data on Welsh film performance, particularly in relation to smaller scale, independent productions. The study also suggests that only a small proportion of exhibitors collect data themselves.

Recommendation 3: Data needs to be collected to create a benchmark for Welsh film and undertake ongoing monitoring of performance. This should form part of the support package going forward with one organisation assigned the responsibility of doing so. It is first important to identify what data already exists and enquiries should be made to central bodies such as Comscore, BFI, Film Cymru and the Arts Council of Wales to that effect. If it is determined that insufficient data is held centrally, and given that we know only a small proportion of exhibitors collect the data, this will require a coordinated response to encourage more exhibitors to collect that data on their CRM system and establish a process for sharing with a central data holder.

8.2.3 Developing a MiW brand

Visibility appears to be an issue for Welsh film and it isn’t clear that a comprehensive, distinct Welsh cinema brand exists beyond the limited activity delivered through MiW to date. The research suggests that within the sector, there is not a particularly strong idea of a Welsh film identity, and not all associations are positive.

Recommendation 4: An interim step for promoting Welsh film could involve a collaboration between key stakeholders in Wales to establish a commonly agreed Welsh film identity.

The stakeholder survey indicates general support for a branding initiative for Welsh film. Several benefits cited it would give Welsh film more of an identity, it would make them more ‘packageable’ and thus easier for venues who want to showcase Welsh film.

Some of the lessons from Welsh branding in other sectors is the need for a unifying brand strategy – that all sectoral brands that focus on Wales and Welshness use the same underlying themes. Visit Wales have developed a consistent, integrated brand that is used through their marketing and international promotion. Some of the defining elements include themes around Welsh history, landscape, creativity, and vibrancy which could equally be applied in promoting Welsh film and creating a Welsh film brand. This is also consistent with themes emerging in some of the international exemplars in this study e.g. in Ireland they play on scenery and an array of period buildings.

There are also useful lessons from other branding initiatives on the implementation of said brand. For example, Food and Drink Wales implement their brand through funding food festivals and events which feature local producers and promote Welsh produce to both the local population as well as visitors from further afield. They also undertake research on the value of Welshness which is used to show the importance of providing Welsh produce. Trade and Invest Wales play on the idea that the economic infrastructure of Wales is sound and that its workforce is well qualified and skilled meaning that it would be an effective base for inward investors. There is also the promise of support and advice to businesses. They implement their Welsh brand identity by attending events based all over the world including their own conferences.

Additionally, each of the international exemplars featured in this report place great emphasis on promoting their sectors at international festivals and film markets. Some of these countries have built good relationships with world-leading festivals in order to ensure at least one film per year is selected to feature at these festivals. It is highly likely that developing a film brand comparable to examples explored in this research would require significant additional investment in the funding available to support films with a Welsh connection.

Recommendation 5: A Welsh film brand should be consistent with the themes underpinning other branding initiatives in Wales including a focus on Welsh history and landscape. Such a brand is likely to require significant investment to have cut-through and an impactful implementation so that Welsh film can reach domestic and international markets more extensively (including through film festivals).

The research also found that most stakeholders believe Welsh film should be promoted within existing creative industry brands such as 'Creative Wales', but it might be possible for another organisation like FHW to manage it as a sub brand under the overarching brand for Welsh creative industries. Given the brand is likely to require significant investment, Welsh Government-backed Creative Wales may be better positioned to deliver it.

Recommendation 6: If it is decided that a Welsh film brand is needed going forward, representations should be made to Welsh Government for it to be adopted by the Creative Wales initiative. Discussions could also be held around the possibility of a Welsh film specialist organisation, such as FHW, retaining the responsibility for managing it but as a sub-brand within Creative Wales.

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