

# **Made in Wales - Benchmarking Report 2021 - 2022**

Report by Delphine Lievens

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Exploring the release strategy, audience impact and the value of support from Film Hub Wales for films identified as 'Made in Wales'

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## Brief

Film Hub Wales launched its Made in Wales strategy in 2014, in response to demand from film exhibitors wanting to show Welsh films but finding a lack of systems in place to enable this. These included ways to find out what Welsh films were available and how to book them, ways to preview or watch Welsh films before programming them, marketing support for Welsh connections and support around engaging with distributors so that Welsh cinemas were given a fair deal on fees and minimum guarantees.

All of these issues were explored through Film Hub Wales' work, including a Welsh film catalogue, Welsh film preview days (similar to the ICO Screening Days but for films with Welsh connections), exhibitor-distributor meet ups and better marketing of films with Welsh connections. Their Made in Wales strategy continues to build on these elements and gives more focus and attention to the exhibition of films with a Welsh connection through long term programming support, marketing and press strategies, plus the creation of added value assets. They are interested in rooting out stereotypes about Wales, giving voice to the diverse and interesting stories by Welsh talent, and supporting the local, independent cinemas that show them. Their ambition is for Welsh film to stand alongside quality independent and foreign language titles worldwide.

In 2020, Film Hub Wales commissioned Film Culture to capture benchmarking data on 12 selected titles released between March 2019 and March 2020, providing analysis to support annual reflection on film performance. This report follows the same principle, and will examine 14 films released between March 2021 - March 2022, with the aim of analysing how they performed in cinemas, and how the support of Film Hub Wales contributed to their release. This report also hopes to draw comparisons with the data from the previous report to see if there are any emerging trends to be found. For this to be done effectively, creating benchmarks, the sample size remains comparable. It also reflects Film Hub Wales' funding agreement with Creative Wales in which they commit to working on 10-12 feature campaigns annually. 20 films in total were known to Film Hub Wales during the '21-'22 period, the 14 features therefore represent a large portion of those titles. They were selected based on the amount of support offered by Film Hub Wales and to present a varying sample of different release sizes and approaches.

It is likely that there are many more films released with one or more Welsh connections in the given release period, but they may remain unknown to Film Hub Wales, or the distributors themselves. The process to discover Made in Wales titles is currently undertaken by one dedicated staff member in the Hub team. With additional funding and capacity, Film Hub Wales has the ambition to increase the size and scope of this work, extending to explore performance of titles across different digital platforms, specific regions and the wider UK screen context within which the data currently sits.

For clarity, films considered to be 'Made in Wales' include: films involving Welsh talent (director, producer, writer and principal cast), films made by production companies or filmmakers who are active in Wales, films set in Wales or dealing with Welsh stories, and films in the Welsh language.

## Methodology

14 feature films, released between March 2021 and March 2022 were selected by Film Hub Wales for the purposes of this analysis. All of these titles had some element of support or communication with Film Hub Wales as part of the Made In Wales strand.

Film Hub Wales sent an online survey to the distributors of each of the films, with questions about box office results, release strategy, and engagement with Welsh cinemas and audiences. At the commencement of this report, those distributors who had not responded were chased up via email, and some came back with ad hoc responses to some, but not all of the survey questions. These responses and the questions they declined to answer will be noted wherever they appear throughout the report. Some data was also withheld by distributors who considered it to be confidential information, we have noted this where relevant throughout the report.

Additionally, desk research and box office data from Comscore was used to compile as much of the missing data as possible, and to find further data and information to augment this report.

For the Men Who Sing case study, Christopher Hird, who is the Founder and Managing Director of Dartmouth Films, who released the film in the UK, was interviewed via Zoom. Information that was shared in that interview along with further information sent by email informed the case study section of this report.

## Executive Summary

At the end of 2022, the BBC reported<sup>1</sup> that the TV and film industry in Wales had generated £155.6m of production spend into the Welsh economy since 2020. In 2021, the Welsh screen sector saw a turnover of £575 million, a 36% increase from the year before. With this boom in Welsh production, it is interesting to analyse if there has been any follow on effect in terms of the distribution of Welsh films both in Wales and across the UK & Ireland as a whole.

14 films 'Made in Wales' and released between March 2021 and March 2022 were selected for the purposes of this study.

### Overview

- 13 of the 14 films selected received a theatrical release in the UK, one was a VOD only release due to Covid related cinema closures.
- Covid restrictions, such as social distancing and vaccine passports had a direct effect on box office potential for films released during the period.
- Only 2 films grossed above £100k at the UK & Ireland box office, and none of the films grossed in excess of £1 million.
- 9 of the films were considered limited releases (less than 100 sites across the UK & Ireland.)

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<sup>1</sup> <https://www.bbc.co.uk/news/uk-wales-64100916>

- Overall, the 13 titles accounted for £1.1 million in box office takings across the UK & Ireland, and £145k (13%) of box office takings in Wales. This exceeded the Welsh market share of all UK & Ireland box office in 2021, which was 3.15%, and the share of box office for 2019-2020 titles, which was 11%.
- Admissions figures are similar, showing 14% of admissions for the films in Welsh cinemas. In 2021, Wales accounted for 4.1% of all UK & Ireland cinema admissions.
- Smaller releases often exceeded these figures, with a higher percentage of box office takings in Wales.

### **Performance in Welsh Cinemas**

- 10 out of 13 theatrically released films achieved a higher box office market share in Wales than the 2021 average of 3.15%.
- The same 10 titles also achieved a share of admissions in Wales above the 2021 average of 4.1%.
- The most successful results within Wales can be found amongst the smaller film releases.
- No distributors provided marketing materials in Welsh.
- Only 6 of the films received special event screenings in Wales, although this was partly affected by Covid restrictions.

### **Release & International Reception**

- All films provided exhibitors with a preview screener, an improvement on 2019-2020 where 3 of the 12 films did not make previews available.
- All films provided cinemas with posters and trailers to promote the film's release.
- All films received some element of online press coverage, with those films about 'real life' Welsh stories garnering the most widespread coverage in Welsh and national press.
- 65% of the films screened at at least one film festival.
- 5 films (or 35%) had theatrical releases outside of the UK & Ireland. 3 more received online only releases in international territories.
- 6 (or 42%) of the films received no theatrical or Home Entertainment release at all outside of the UK & Ireland.

### **Budgets and Funding**

- Similarly to the 2019 - 2020 report, there was a reticence from distributors to share information about their distribution budget, which they consider to be confidential information.
- One film cited spending less than usual on their distribution campaign, given that they were targeting a 'limited' audience both within Wales and across the UK as a whole.
- Two releases received funding from Ffilm Cymru towards their distribution campaign.
- Only one film received BFI production support, via Doc Society, which is a decrease from 2019-20 where 33% received production funding and 58% export funding..

## Support from Film Hub Wales

- Feedback about Film Hub Wales' support was mixed, with some distributors citing that it is difficult to quantify whether their support led to increased cinema bookings in Wales. Film Hub Wales frequently communicates with cinemas about available Made in Wales titles, but not all distributors showed an awareness of this, with many focused on the lack of financial support available.
- 5 respondents were positive about the support they received, citing that Film Hub Wales allowed them to reach a wider number of Welsh exhibitors, to navigate issues related to covid closures, and to promote event screenings in Wales.
- Distributors' lack of acknowledgement or planned release activity around the Welsh connections for their film makes it difficult for Film Hub Wales to be able to provide them with effective support. There is also a lack of clarity from distributors' about what help Film Hub Wales can and can't provide.

## Diversity & Representation

- 40% of the directors (6 in total) and 38% of the producers (9 in total) are female, a marked improvement on the 2019 - 2020 Made In Wales report, which recorded 28% of producers as female, and only 8% of directors as female.
- The 2019-2020 report also cited 8% of writers (just 1 writer) as female, and that figure is unchanged in the 2021 - 2022 figures.
- None of the 14 had any directors, producers or writers involved who were not white. This is a decrease from the figures in the 2019-2020 report, which lists just 1 producer (or 4%) from an ethnic minority background.
- In the 2019-2020 report there was one fully Welsh language title and one bilingual title. In 2021 - 2022, there was only one bilingual title released, and no fully Welsh language titles.

## Analysis

### Overview

14 films released between March 2021 and March 2022 were selected for the purposes of this study. All of the films were considered to be 'Made in Wales' by Film Hub Wales because they had significant Welsh connections. The films all received a theatrical release in the UK bar one, *Amber and Me*, which was a primarily online release due to Covid related restrictions.

When comparing to the previous Made In Wales report by Film Culture<sup>2</sup>, only 10 of the 12 films analysed received some form of theatrical release (with an additional title pivoting to a VOD release due to the onset of the Covid pandemic.) This is interesting to note, as it suggests that the effects of Covid closures clearly didn't deter distributors from continuing to

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<sup>2</sup> <https://filmhubwales.org/en/finding-welsh-film-data-report/>

attempt theatrical releases in the 2021 - 2022 period, with a marginally higher percentage of films receiving theatrical release in the 2021-2022 period.

The releases comprise a wide list of UK distributors. Whilst primarily independent, there is also one release from Sky Cinema - a streaming company also operating in the theatrical distribution space, one from Lionsgate - a mini major<sup>3</sup>, and one from a major studio - Warner Bros. It is interesting to note that 3 of the 14 releases came from Munro Film Services, who have also released films with Welsh connections in the past. The company are not Wales based, but there is potentially more scope for a distributor to engage with both Welsh cinemas and audiences if they have multiple 'Made in Wales' films on their slate.

Film Name	Release date	Distributor	Type of release
<i>A Christmas Carol</i>	3/12/2021	Munro Film Services	Theatrical
<i>Amber and Me</i>	1/3/2021	Amber Content	Primarily online (one reduced capacity theatrical screening)
<i>Censor</i>	20/08/21	Vertigo	Theatrical
<i>Don't Go Gentle: A Film About IDLES</i>	2/7/2021	Doc 'n Roll Films	Theatrical
<i>Dream Horse</i>	04/06/21	Warner Bros	Theatrical
<i>La Cha Cha</i>	17/9/2021	Music Film Network	Theatrical
<i>Men Who Sing</i>	6/6/2021	Dartmouth Films	Theatrical
<i>Rebel Dykes</i>	26/11/2021	BFI	Theatrical
<i>Save the Cinema</i>	14/1/2022	Sky	Theatrical
<i>Sideshow</i>	11/3/2022	Munro Film Services	Theatrical
<i>Six Minutes To Midnight</i>	17/5/2021	Lionsgate	Theatrical
<i>The Ballad of Billy McCrae</i>	24/9/2021	Munro Film Services	Theatrical
<i>The Toll</i>	27/8/2021	Signature Entertainment	Theatrical
<i>The Welshman</i>	17/5/2021	Ebb in Joy Pictures	Theatrical

The table below shows a breakdown of the total UK box office takings for all theatrically released titles, total number of sites (cinemas) the film was released in, and the total number of admissions across all screenings. Those admissions figures with an asterisk next to them indicate that the admissions figure has been estimated, by dividing the total box office figure by the 2021 UK average cinema ticket price of £7.52<sup>4</sup>. Welsh specific data for admissions and box office are shown in a later table.

Film Name	Total UK box office	No. of sites	Total admits	
Sideshow	£1,972	43	262	*
The Ballad of Billy McCrae	£2,296	20	305	*
The Welshman	£3,979	9	722	

<sup>3</sup> Mini-major studios (or "mini-majors") are the larger, independent film production companies that are smaller than the major studios and attempt to compete directly with them.

<sup>4</sup> As per the UK Cinema Association website: <https://www.cinemauk.org.uk/the-industry/facts-and-figures/uk-cinema-industry-economics-and-turnover/average-ticket-price/>

Men Who Sing	£6,113	32	934	
The Toll	£7,268	14	966	*
Don't Go Gentle: A Film About IDLES	£17,893	49	2351	
La Cha Cha	£21,209	54	4484	
A Christmas Carol	£22,696	140	3018	*
Rebel Dykes	£40,369	58	5368	*
Six Minutes To Midnight	£50,836	64	7377	
Save the Cinema	£60,661	119	8067	*
Censor	£169,264	209	22509	*
Dream Horse	£739,375	706	98321	*
Amber and Me	N/A	N/A	N/A	

There is a range of release sizes and box office shown in the table, although it is worth noting that there is not always a correlation between the number of sites a film is released in and the box office takings. The reason for this inconsistency in per screen average<sup>5</sup> is likely the effect of Covid restrictions, which has affected cinema box office takings as a whole across the period. Cinemas were closed across the UK & Ireland in 2021 until the 17th May, with social distancing rules reducing available cinema capacity. Additionally, Wales was the only country to briefly impose vaccine passports as a condition of cinema entry from November 15th 2021, although this move was criticised by numerous arts venues who claimed it was having a negative effect on attendance figures, rather than a positive one<sup>6</sup>. Vaccine passports were removed as a requirement for cinemas in Wales on 17th February 2022.<sup>7</sup>

Even after cinemas reopened and stayed open, box office takings were of course not as high as usual throughout 2021, and continue to be down on pre-covid levels in 2022. For example, the UK & Ireland box office total for 2021 was £597 million, and from 2015 - 2019, it was consistently in excess of £1.3 billion<sup>8</sup>.

Despite the effects of Covid on box office takings, it is also worth noting the levels of box office achieved by the group of films as a whole. Only two films released saw box office takings in excess of £100k, and none of the films crossed the £1 million mark. Additionally, only one film, DREAM HORSE, was a saturation<sup>9</sup> release and only 3 films were released wide<sup>10</sup>. This leaves a total of 9 out of 13 films that had a limited release in less than 100 sites across the UK, and 11 films with a total box office under £100k.

This large number of smaller releases could potentially point to issues with the way Welsh film is viewed within the context of the UK film industry as a whole. Despite the figures

<sup>5</sup> Screen average is the result of dividing total box office gross by the number of sites a film was shown in.

<sup>6</sup> <https://www.artspromotional.co.uk/news/vaccine-passports-not-sustainable-wales>

<sup>7</sup> <https://www.gov.wales/covid-pass-no-longer-required-indoor-or-outdoor-events>

<sup>8</sup> <https://filmdistributorsassociation.com/the-industry/databank/uk-and-ireland-market-trends/annual-box-office/>

<sup>9</sup> A saturation release is considered to be a release across all UK cinemas, usually in the region of 500+ sites.

<sup>10</sup> A wide release is considered to be anything over 100 sites.

around increased investment in Welsh TV and film production, it suggests that Welsh film is potentially receiving less investment at production, distribution and exhibition stage than films made in other UK nations. Further to that, Welsh films are considered to have a smaller potential audience than films made in other nations of the UK, as the majority of releases are limited in size. Of course it is worth considering that some of these films were released primarily only in Wales, which accounts for the smaller size of release, but this still leaves questions about why Welsh stories are only seen as only relevant to a Welsh audience.

The table below shows the total figures for all 13 theatrical releases analysed in this report. Admissions are marked with an asterisk to indicate that as per the previous table, some admissions figures have been estimated based on box office takings.

		<b>Total box office from Welsh sites</b>	<b>Total admits in Welsh sites*</b>	<b>% of total box office from Welsh sites</b>	<b>% of total admits in Welsh sites</b>
<b>Total UK box office</b>	<b>Total admits*</b>				
£1,143,931	154,685	£145,268	21246	13%	14%

Overall, the 13 titles accounted for £1.1 million in box office takings across the UK & Ireland, and £145k of box office takings in Wales itself, which amounts to 13% of box office takings. Admissions are similar, with 14% of admissions for the films within Welsh cinemas. For comparison, total UK & Ireland box office figures in 2021 were £597 million, with Wales accounting for a 3.15% market share<sup>11</sup>, suggesting that these 13 titles as a whole over-performed at the box office in Wales compared to titles without Welsh connections.

The Welsh population amounted to 5.2% of the UK in 2021<sup>12</sup>, while Welsh cinemas saw a total of approx 3 million admissions in 2021, which accounted for 4.1% of all UK & Ireland cinema admissions<sup>13</sup>. Given that 14% of admissions overall were in Welsh cinemas, it suggests that Welsh film is proving attractive to Welsh audiences, although of course there is still room to increase that percentage.

When comparing these figures with the theatrical releases analysed in the 2019-2020 report, we can see some signs of improvement. In that period, the total UK & Ireland box office for all theatrically released titles analysed was £392,289, with the box office takings in Wales amounting to £42,941. Whilst the numbers for the 2021-2022 period are significantly higher, this is somewhat swayed by the inclusion of DREAM HORSE which alone grossed £739k in the UK & Ireland. However, the percentage of box office coming from Welsh sites in the 2019-2020 period was 11%, whereas in 2021-2022 it saw a slight increase to 13%. With this in mind, it should be noted that the percentage of admissions in Welsh sites in fact saw a drop-off, from 16% down to 14% in 2021-2022. However, with some of the admissions figures for this period being approximate figures, it is not possible to draw a conclusion from this.

<sup>11</sup> Figure generated using Comscore box office data for the UK & Ireland

<sup>12</sup> As per the Office For National Statistics:

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/populationandhouseholdestimateswales/census2021>

<sup>13</sup> BFI Statistical Yearbook 2021



It should also be noted that the percentage of takings and admissions specifically in Welsh sites is likely skewed by bigger releases such as DREAM HORSE and CENSOR where only a small percentage of their sites were based in Wales. We can see in the following table that a number of the smaller releases had a larger percentage of both box office takings and sites within Wales.

## Performance in Welsh cinemas & engagement with Welsh audiences

The table below breaks down performance in Wales specifically across box office, admissions and size of release for all 13 theatrical releases.

Film Name	Cume box office (UK & Ireland)	Cume box office (Wales)	Number of sites (Wales)	Total admits (Wales)	% of total box office from Welsh sites	% of total sites in Wales	% of total admits in Welsh sites
Sideshow	£1,972	£385	4	28	20%	9%	11%
The Ballad of Billy McCrae	£2,296	£658	7	149	29%	35%	49%
The Welshman	£3,979	£3,979	9	722	100%	100%	100%
Men Who Sing	£6,113	£2,836	11	467	46%	34%	50%
The Toll	£7,268	£6,024	10	801	83%	71%	83%
Don't Go Gentle: A Film About IDLES	£17,893	£762	2	130	4%	4%	6%
La Cha Cha	£21,209	£20,910	42	2901	99%	78%	65%
A Christmas Carol	£22,696	£1,700	10	261	7%	7%	9%
Rebel Dykes	£40,369	£1,221	7	162	3%	12%	3%
Six Minutes To Midnight	£50,836	£1,240	4	208	2%	6%	3%
Save the Cinema	£60,661	£21,093	24	4185	35%	20%	52%
Censor	£169,264	£4,405	10	586	3%	5%	3%
Dream Horse	£739,375	£80,057	45	10,646	11%	6%	11%
Amber and Me	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Almost all the films achieved a higher box office market share in Wales than the 2021 average of 3.15%, with the exception of SIX MINUTES TO MIDNIGHT at 2%, and REBEL DYKES and CENSOR both matched the average at 3%. This suggests that for the most part, Made In Wales connections allowed films to see much higher than average performance at the box office in Wales. Similar results can be seen across admissions figures, with all of the same 10 titles achieving a share of admissions in Wales above the 2021 average of 4.1%. However, once again we can see that the most successful results lie with the smaller film releases, which overall had smaller levels of admissions and box office takings, and suggesting that Welsh film is for the most part confined to smaller, less ambitious cinema releases.

This is demonstrated further by two of the highest grossing titles - CENSOR and DREAM HORSE, which at 5% and 6% respectively have some of the lowest footprints of sites in Wales across their whole release. This suggests that the bigger releases are less likely to

tailor their release strategy specifically to Welsh audiences, despite presumably having more money and manpower behind their release campaigns. Nonetheless, with a box office market share of 11%, DREAM HORSE did over perform at the Welsh box office. This is presumably based on prior awareness of the story behind the film amongst Welsh audiences. It was reported in the Welsh press at the time and followed by the release of the documentary DARK HORSE: THE INCREDIBLE TRUE STORY OF DREAM ALLIANCE in 2015.

It's harder to know why CENSOR had such low levels of engagement with Welsh audiences across its release, as Vertigo declined to share any information about their release strategy due to confidentiality reasons. One potential issue was the film's genre, Film Hub Wales noted that a number of the distributors that they work with are not confident that their audiences will come to see horror films, so they chose not to screen it. Additionally, the film was released in August 2021, when cinemas were still in the process of re-opening and all had Covid restrictions in place.

Another suggestion is that the distributors of films such as CENSOR and others with low percentages of admissions, box office and cinemas in Wales such as SIX MINUTES TO MIDNIGHT, DON'T GO GENTLE, or REBEL DYKES potentially didn't embrace being part of Made in Wales or the film's Welsh identity. For CENSOR, having a female director (Prano Bailey Bond) at the helm meant that the film was heavily marketed as a female-led horror, but her Welsh heritage was almost never mentioned. BFI, who distributed REBEL DYKES indicate in the table below that they didn't even realise the film had Welsh connections (directors Hari Shanahan and Siân A Williams are both Welsh). This leads to questions about the identity of Welsh film, and what makes a film specifically Welsh. How can distributors and exhibitors work to encourage audiences to see films not just clearly set in Wales, telling stories about Wales, but also to see films made by Welsh talent that may be less obvious in their Welsh connection?

Some of the smaller titles were released almost entirely in Wales, including THE WELSHMAN, which only played in Welsh cinemas, LA CHA CHA, which saw 99% of its box office takings coming from Welsh sites, and THE TOLL, where Welsh sites made up a total of 83% of box office takings. With all these films grossing below £25k in total (and two below £10k), it again shows a correlation between smaller release sizes and higher Welsh audience engagement. Likewise, all three films are set in Wales, in the case of LA CHA CHA and THE TOLL, featuring Welsh cast, and THE WELSHMAN in name alone is very clearly a Welsh film.

All of the distributors surveyed were also asked about their engagement with Welsh audiences via the means of special event screenings in Wales and their marketing materials. When asked if they provided marketing materials in the Welsh language, all distributors who responded (all excluding Vertigo and Warner Bros.) said no. Numerous reasons for a lack of provision of Welsh language marketing materials were cited including a lack of available funding to do so, often by independent distributors. Additionally, two distributors cited that they didn't think the film was 'Welsh enough' to need them, and others claimed that they didn't believe there was a need for Welsh language marketing because it's not something they have seen done before, and cinemas will handle translation themselves where needed.

The Welsh language is the native language of the filmmakers and stories connected to these films, and thus there is a strong argument for making Welsh language marketing materials available for Made in Wales films. It shows a willingness from distributors to engage with Welsh audiences. Furthermore, all cinemas that receive funding from the Arts Council of Wales have to provide Welsh translations as a condition of their funding, although it is likely that distributors, with the vast majority of them based outside of Wales, aren't aware of this. It means the same translation work is duplicated across individual cinemas, when distributors could be providing translated assets as a central resource, giving cinemas much needed time to focus on other aspects of marketing their screenings.

With this in mind, it is worth referencing the recent BFI film release ENYS MEN, said to be the first ever film release to provide bilingual marketing materials in both English and Kernewek (the language of Cornwall), given the film was made in Cornwall by a Cornish filmmaker, and the Kernewek language features in the film<sup>14</sup>. This will hopefully increase awareness of the possibility for bilingual marketing materials amongst film distributors. The comments around budget concerns also suggest that there is scope for funding to be provided via Film Hub Wales or another Welsh body for the creation of these bilingual marketing materials.

Of the distributors of the 13 films (all excluding CENSOR) that responded to this section of the survey, a total of 6 had special event or cast and crew screenings in Wales. These were THE TOLL, MEN WHO SING, AMBER AND ME (the one theatrical screening), LA CHA CHA, THE WELSHMAN and DREAM HORSE. With many of these releases being those that over performed in terms of their Welsh market share at the box office, it seems reasonable to suggest that this engagement with Welsh cinemas in the form of offering Q&A screenings and special events serves as a way to make Welsh audiences more aware of the film and its Welsh connections.

## **Press Coverage**

All 14 films received some element of online press coverage, consisting of at least reviews and some features across both newspaper websites and online blogs. However, for DON'T GO GENTLE, A CHRISTMAS CAROL and REBEL DYKES it wasn't possible to find any press coverage that alluded to the film's Welsh connections. For some, the mention of a Welsh connection was minimal. For example, the only piece of coverage acknowledging that CENSOR's director Prano Bailey-Bond is Welsh was the Guardian newspaper's review of the film. This was also the case for THE BALLAD OF BILLY MCCRAE in its Guardian review, which mentions Wales as the setting.

The films that garnered the most meaningful press coverage in relation to their Welsh connections were those that featured real life stories of Welsh people, be those fiction or documentary (SAVE THE CINEMA, MEN WHO SING, THE WELSHMAN and DREAM HORSE), and films that were shot in Welsh locations (THE TOLL, LA CHA CHA and SIX MINUTES TO MIDNIGHT). In all cases, the press coverage skewed more towards Welsh publications such as BBC News Wales, Wales Online, South Wales Guardian, South Wales Argus, North Wales Live and Wales247, but there was also notable national coverage too.

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<sup>14</sup> <https://www.screencornwall.com/news-events/2gu349uevq6du4gsrcaqd397b1pwy6>

For DREAM HORSE both the ITV and Irish Times websites ran features focusing on the real life story behind the film, and SAVE THE CINEMA was featured on the ITV website and I News. THE WELSHMAN and MEN WHO SING only received coverage from Welsh online outlets, this could potentially be due to them having smaller release campaigns - THE WELSHMAN only screened exclusively in Welsh cinemas.

A Welsh Premiere event also proved to be a good draw for press coverage, with DREAM HORSE receiving both national and local online coverage of its premiere screening in Blackwood, featuring some of the 'real-life' people who inspired the film. Additionally, whilst AMBER & ME had very sparse coverage, due to being an online-only release, it was still covered by Wales247 when Chapter Arts premiered the film on their online Chapter Player, in lieu of an in-person event, during Covid. However, it can be hard to draw a correlation between press coverage and the effect on potential audiences, as typically the films with more press coverage were larger releases. However, it can be noted that the films with more Welsh press coverage typically had a higher share of box office from Wales, although this is perhaps indicative of the film campaigns being more engaged with Welsh audiences and Welsh stories in general.

## Release Strategy

The table below shows different distributor's responses to survey questions about how they worked with exhibitors to share information about their film's release. DREAM HORSE, CENSOR and SAVE THE CINEMA have been removed as the distributors declined to share this information, although Sky Cinema did indicate that a preview of SAVE THE CINEMA was made available to cinema programmers.

Film Name	Distributor	How did you communicate the film's release to exhibitors?	How many months notice did you give exhibitors of the release?	Were exhibitors offered a screener or preview of the film prior to booking?
The Toll	Signature Entertainment	Email	3	Y
Don't Go Gentle: A Film About IDLES	Doc'n Roll Films Ltd.	BFI FAN Indie Box Office / Film Hubs	2	Y
Men Who Sing	Dartmouth Films	Email / Phone	2	Y
Six Minutes To Midnight	Lionsgate	Email	2	Y
Amber and Me	Amber Content	Email / Industry Screenings	2	Y
Sideshow	Munro Film Services	Email/Phone/ Slate Days	2	Y
The Ballad of Billy McCrae	Munro Film Services	Email/Phone/ Slate Days	2	Y
A Christmas Carol	Munro Film Services	Email/Phone (N.B. REISSUE of 2020 release)	3	Y

La Cha Cha	Music Film Network	Email/ Film Hub Wales	3	Y
The Welshman	Ebb in Joy Pictures	Email/ Social Media	1.5	Y
Rebel Dykes	BFI	Email / Phone	3	Y

The methods used for making exhibitors aware of the release seem to be largely the same, with email being the most popular and used by all distributors. There are some different strategies that stand out, such as DON'T GO GENTLE securing a mention in the BFI FAN newsletter, and THE WELSHMAN using social media to contact potential screening venues, but it is hard to correlate these strategies with any of the box office results for the films. All but one of the films also had a 2-3 month lead in time when discussing their releases with exhibitors, so there is not enough variation to suggest that a longer lead in time might help secure a wider footprint of Welsh cinemas for any given film release.

All of the distributors who responded had made a screener or preview of the film available to exhibitors in Wales, which likely encouraged some cinemas to book the films. However, with some films receiving much less engagement from Welsh cinemas than others, it is difficult to argue that providing access to a preview or screener is specifically beneficial to the performance of Made in Wales films, just that it is a good strategy for ensuring cinema bookings overall.

When comparing against the 2019-2020 Made In Wales Report, 3 of the 12 films analysed in that report did not provide any form of preview to exhibitors, and it was suggested this had a negative impact on the number of sites booked for the film. This demonstrates an interesting shift, and positive outcome of the Covid pandemic, in that distributors at all levels are more willing to share film previews and screeners with exhibitors. This is potentially due to the usage of secure online screening rooms that became far more common during the Covid pandemic.

Distributors were also asked which marketing materials they made available to cinemas, and the responses are shown below.

<b>Film Name</b>	<b>What marketing materials did you supply to exhibitors to support your film?</b>
The Toll	Stills, Trailer, Poster, Press release, Synopsis
Save the Cinema	Trailer, Poster
Don't Go Gentle: A Film About IDLES	Stills, Trailer, Poster, EPK, clips
Men Who Sing	Stills, Trailer, Poster, Synopsis
Six Minutes To Midnight	Stills, Trailer, Poster, EPK
Amber and Me	Poster
Sideshow	Stills, Trailer, Poster, EPK, Social assets, Press updates
The Ballad of Billy McCrae	Stills, Trailer, Poster, EPK, Social assets, Press updates
A Christmas Carol	Stills, Trailer, Poster, EPK, Social assets
La Cha Cha	Trailer, Poster
The Welshman	Trailer, Poster
Rebel Dykes	Trailer, Poster, Social assets

With the exception of AMBER AND ME, which didn't have a theatrical release, trailers and posters were by far the most popular assets with all releases providing them. The majority of releases also provided stills and an EPK (electronic press kit). With only 4 releases providing social media assets, and 2 providing cinemas with press updates it is difficult to tell if this has any noticeable impact on audience levels for the film. However, it is worth considering that using digital assets for social media would be a far easier and cheaper way for distributors to create bilingual or Welsh language assets.

## **International Reception & Festivals**

Of the 14 films, only 5 (or 35%) had theatrical releases outside of the UK & Ireland. These were THE TOLL (Australia & New Zealand), SIX MINUTES TO MIDNIGHT (12 international territories including the US), REBEL DYKES (US), CENSOR (US, Russia) and DREAM HORSE (US, France, Italy, Australia & New Zealand). 3 more of the films received online only releases in international territories, potentially related to ongoing cinema closures across the world due to Covid-19. 6 (or 42%) of the films received no theatrical or Home Entertainment release at all outside of the UK & Ireland.

To provide wider context, it should also be noted that UK produced independent films as a whole have seen decreasing returns from international box office over the past ten years, as a result of the ongoing disruption to traditional theatrical distribution models, as well as more recently the effects of the Covid-19 pandemic<sup>15</sup>. However, in 2019-2020 only 33% of Made in Wales titles had international theatrical releases, so there was actually a small increase seen in the 20-21 period. None of the films received export funding from the BFI, which is a noticeable reduction from 58% in 2019-20.

In terms of worldwide box office gross, DREAM HORSE was by far the most successful, grossing in excess of \$6.5m. Nearly half of that gross came from the film's US release, demonstrating a clear interest for Welsh stories in both that territory and others internationally. However, it is worth noting that the other three titles released internationally are amongst those with less publicised Welsh connections.

The 14 Made in Wales titles released in 20-21 played in significantly less film festivals both in the UK and internationally. Two films (or 14%), DREAM HORSE and CENSOR played at a top ranking international festival (Sundance 2021), with Dream Horse receiving its World Premiere there. Two further films played in major UK festivals: THE TOLL premiered in Glasgow Film Festival 2021, and REBEL DYKES played in both BFI Flare and Edinburgh 2021 film festivals. This is a reduction from 19-20, where 42% of titles played at the London Film Festival, 25% at Edinburgh, 25% at SXSW and 17% in Toronto.

For those films that did not play at major film festivals, the most widespread were those that fit a particular niche. For example, DON'T GO GENTLE played over 20 documentary and music focussed film festivals internationally, following its premiere at the UK music doc festival Doc n' Roll. REBEL DYKES played a large number of LGBTQ+ specialist film

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<sup>15</sup> An Economic Review of Independent Film, by Alma Economics & commissioned by the BFI, July 2022

festivals internationally, including Frameline and Outfest in the US. Alongside its Sundance premiere, CENSOR played at a number of well known horror genre festivals, including Sitges, Frightfest and Abertoir. There were also 5 films (35%) with no festival play at all, whereas all 12 Made in Wales titles released in 2019-2020 had played at least one festival.

## Budgets and Funding

Distributors were also asked questions about the cost of their distribution campaign for each film. For some this was considered to be confidential information, and as such DREAM HORSE, CENSOR, SAVE THE CINEMA and REBEL DYKES were removed from this section of analysis. There is missing information for some of the titles included, also for confidentiality reasons. As such, it is difficult to draw much analysis from the information shown in the table below. This reticence to share information from distributors is an ongoing issue that was also flagged in the previous report.

Film Name	What was the total cost of your distribution campaign?	What is your average campaign budget on a general release?	What was your reason for spending more / less than average on this particular release?
The Toll	£1,000		
Don't Go Gentle: A Film About IDLES	£20,000	This is our first film release	n/a
Men Who Sing	£27,150	£30,000	
Six Minutes To Midnight			It was out on home-ent already
Amber and Me	£10,000	£15,000	
Sideshow	£20,000	varies	
The Ballad of Billy McCrae	£20,000	varies	
A Christmas Carol	£20,000	varies	
La Cha Cha	£10,000	£15,000	because it was a limited release and targeted at very local communities
The Welshman	£2,000	varies	Indie film with no budget

Only two titles express that their spend was below usual and give a reason for it - in the case of SIX MINUTES TO MIDNIGHT, the film had already been made available on home entertainment platforms, which was a common concern for distributors in the wake of Covid closures in cinemas. For LA CHA CHA, the distributor spent £5,000 less than usual on their campaign, citing that it was a limited release which they targeted specifically at Welsh communities. With 99% of LA CHA CHA's box office takings coming from Welsh cinemas, this again shows that distributors based outside of Wales may have a perception of Welsh films as niche product with a limited potential.

This table shows which releases received funding support for their distribution campaign, and where from.

<b>Film Name</b>	<b>Distributor</b>	<b>Distribution funding</b>
The Toll	Signature Entertainment	None
Save the Cinema	Sky	Ffilm Cymru Wales
Don't Go Gentle: A Film About IDLES	Doc'n Roll Films Ltd.	None
Men Who Sing	Dartmouth Films	Ffilm Cymru Wales
Six Minutes To Midnight	Lionsgate	None
Amber and Me	Amber Content	None
Sideshow	Munro Film Services	None
The Ballad of Billy McCrae	Munro Film Services	None
A Christmas Carol	Munro Film Services	None
La Cha Cha	Music Film Network	The Welsh Government (Creative Wales)
The Welshman	Ebb in Joy Pictures	None
Rebel Dykes	BFI	None
Censor	Vertigo	BFI Film Fund

A total of 3 titles (or 21%) received distribution funding support from either Creative Wales or Film Cymru, and only one received BFI Film Fund support for distribution, CENSOR.

With SAVE THE CINEMA achieving a 35% box office share from Welsh cinemas, MEN WHO SING grossing 46% of its box office in Wales, and LA CHA CHA grossing 99%, it could be argued that having additional budget funding from a Welsh organisation allows Welsh market share to reach a level far above the average at the box office. However, it's hard to directly correlate these two elements, especially given that all three films are Welsh stories, set in Wales, and therefore potentially already more attractive to a Welsh audience than some of the other titles with less clear Welsh connections. For CENSOR the BFI funding was granted to distributor Vertigo to help the film reach a wider audience, specifically younger females, so targeting Welsh audience specifically was not one of the aims.

Of all the films, three (or 21%) received any form of BFI funding support across production, export and distribution funding: THE TOLL, CENSOR and MEN WHO SING. MEN WHO SING received production funding from BFI via the support of Doc Society, THE TOLL was funded via the BFI supported Cinematic scheme, and CENSOR received development, production and distribution funding. When compared to the previous 2019-2020 report, there is a marked decrease in the number of Made in Wales titles that received public funding. In 2019-2020, 66%, or more than 3 times as many films had received Film Cymru or Creative Wales funding. Additionally, 33% of films in 2019-2020 had received some form of BFI funding. Whilst results for the 20-21 group of Made in Wales films may have been impacted by the effects of Covid-19 on cinema going, it could be suggested that a lack of public funding support limited the scale of both production and release campaigns for the films too.



## Support from Film Hub Wales

Film Hub Wales contacts all distributors of Made In Wales films, where known. Each Welsh film is recorded in their [online catalogue](#) to make it easier for programmers to find it / book it.. Film Hub Wales also hosts the film in an online preview room; a password protected area of their website containing screeners of upcoming films for BFI FAN Members to include in their programmes. If it is listed in the FHW preview room, it is also highlighted in a BFI FAN newsletter going out to 1500+ member cinemas across the UK, every month. Exhibitors can also apply for funding from Film Hub Wales to support the delivery of their events. All of this support is available to all films with Welsh connections and ensures that the film is visible to programmers forever (even when Film Hub Wales not directly promoting or mentioning it).

For select titles that meet key criteria, such as strong inclusion principles, Welsh hook and audience potential, the strategy goes deeper. . From the moment a film receives a distributor, Film Hub Wales work alongside them to develop their distribution strategy in Wales. To begin, Film Hub Wales consult with them to explain the challenges facing Welsh cinemas, laying out solutions and potential support strategy. The aim is to ensure Welsh cinemas are not financially exploited or given unfair booking terms when licensing a Welsh film, and to make sure the distributor highlights the film's Welsh connection in their marketing strategy. For the latter, where a distributor is lacking in funds or capacity, Film Hub Wales have some capacity to collaborate. Made in Wales has a small budget allocated for commissions and press releases, and to host assets via their platform [The Whole Story](#).

The Made in Wales Officer, which is funded by Creative Wales, also works to create tailored assets such as interviews, articles, reviews and curated short films packages. In the case of films such as CENSOR, colouring sheets were commissioned and for MEN WHO SING, there were song sheets from popular Welsh language choral music, allowing audiences to sing along. With each film, the approach is tailored and the officer works with the distributor to support discussions around rights, bookings and special events - such as leading the premiere Q&A of THE TOLL in Fishguard.

Film Hub Wales strategy for supporting Welsh film encompasses the following elements previously mentioned, which all sit alongside each other to ensure Welsh films have the best chance of success at the box office:

### Welsh Film Preview Days

Similar to the [ICO screening days](#), Welsh Film Preview Days bring together UK exhibitors annually to watch a selection of films with Welsh connections and consider them for their upcoming programmes. The aim of this event is to ensure that there is more visibility for Welsh films and to give exhibitors a chance to watch titles in advance so they can plan better marketing strategies and attract wider audiences. It also provides an opportunity for distributors to receive direct feedback from Welsh exhibitors on their films.

### Exhibitor Meet-Ups

In an end of year review meeting for Made In Wales, exhibitors noted the difficulties in communicating with larger distributors. This included miscommunications over email, lack of communication around marketing plans and distributors charging different. To resolve this,

they set up quarterly meet-ups for Welsh exhibitors to chat directly to distributors about Welsh films. This would ensure (and has ensured) that exhibitors have a say in a Welsh film's marketing / release strategy, there is clear and fair communication around fees / minimum guarantees for everyone, and distributors are meeting the people they are selling to. Welsh exhibitors have noted that face-to-face communication in this way has made them feel more confident about programming Welsh films and other releases on a distributor's slate.

### The Whole Story

The Whole Story is the Film Hub Wales platform for hosting commissioned assets, talent interviews, film reviews and themed film packages that exhibitors can share with audiences to promote Welsh releases. This began in 2021, when the Made in Wales Officer first came into post, as a way to begin sharing the stories behind Welsh film productions and championing Welsh talent. It's how Film Hub Wales highlights the Welsh connections in films, so that audiences can connect better with Welsh screen stories. This way, they can also give the films a better chance of succeeding in the wider film market, increase their chances of winning awards and build stronger career pathways for filmmakers whilst raising the profile of Wales' screen industry.

The table below shows the various ways in which Film Hub Wales supported the 14 Made in Wales titles in this report. All 14 films were placed in the Welsh film catalogue, and supported via social media and/or email newsletters. 10 films (71%) were made available to exhibitors in the online Screening Room, with exceptions due to distributors choosing to make their film available to exhibitors via different means. 4 films (28%) were shown at Welsh Preview Days, 5 (35%) received marketing support or bespoke marketing assets, and 4 films (28%) were featured in Made in Wales press releases.

	Welsh Film Catalogue	FHW Screening Room	Supported via social media/ FHW newsletters	Shown at Welsh Film Preview Days	Received marketing support / MIW made marketing assets	Supported via MIW press release/ own press release
THE WELSHMAN	x	x	x	x	x	x
DREAM HORSE	x		x			
REBEL DYKES	x		x			x
DON'T GO GENTLE	x	x	x			
AMBER AND ME	x	x	x			

SIX MINUTES TO MIDNIGHT	x		x			
SAVE THE CINEMA	x		x		x	x
THE TOLL	x	x	x		x	
A CHRISTMAS CAROL	x	x	x			
SIDESHOW	x	x	x			
BALLAD OF BILLY McCRAE	x	x	x			
LA CHA CHA	x	x	x	x		
MEN WHO SING	x	x	x	x	x	
CENSOR	x	x	x	x	x	x

The following table shows the response of distributors, when surveyed about the support they received from Film Hub Wales:

<b>Film Name</b>	<b>Distributor</b>	<b>Do you think our support helped the release? Y/N</b>	<b>Please state why / why not</b>
The Toll	Signature Entertainment	Y	Yes, it was great to collaborate on The Toll as it increased our exposure to exhibitors in the UK and helped us to make some bookings. We were also able to conjoin the film with a great short film which was great too.
Save the Cinema	Sky	Y	Yes, getting the Welsh support for a film like this was great
Don't Go Gentle: A Film About IDLES	Doc'n Roll Films Ltd.	N	Unfortunately we didn't have finance support from Film Hub Wales to help to reach for exhibitors in Wales we needed that support to bring talent and reach wider audiences.
Men Who Sing	Dartmouth Films	Y	Yes. We released this film in a very difficult environment. Because of Covid some cinemas were not open, some did not open when they said they would, event screenings were not allowed, and one of the core audience groups was reluctant to come to cinemas even when they were open. We needed every help we could get in spreading the word and helping

			identify the most promising venues for exhibition, potential partners and screening opportunities, all of which Film Hub helped us with. In addition Film Hub was important in amplifying Welsh screenings on social media, including the dedicated page on their website.
Sideshow	Munro Film Services	M	There are possibly a couple of bookings in Wales that may have come about because of Film Hub Wales support. It is hard to distinguish, as we would have gone out to these venues anyway.
The Ballad of Billy McCrae	Munro Film Services	N	In all honesty on this title, the bookings outside of main operators were not forthcoming, so probably not.
A Christmas Carol	Munro Film Services	M	There were several bookings that may not have arisen as a result of Film Hub Wales' support.
La Cha Cha	Music Film Network	Y	Yes of course - by putting the release in front of exhibitors. A wider range of exhibitors than I ever could have reached.
The Welshman	Ebb in Joy Pictures	Y	Yes, extra support and promotion was really helpful
Rebel Dykes	BFI	M	Don't know

One notable element is that 2 distributors across 3 separate releases answered 'maybe' in response to being questioned on Film Hub Wales' support being beneficial to the release. This suggests that in at least some cases it is difficult to measure the impact of Film Hub Wales' support, because distributors are receiving bookings from Welsh cinemas, but not getting an indication of if those bookings arose from their own communications with distributors, or information shared by Film Hub Wales. For example, in the case of REBEL DYKES, Film Hub Wales had in fact directly contacted 8 Welsh cinemas to share information about the film, and they then went on to book it for a screening.

Be that as it may, there were still 5 respondents who were positive about the support they received, citing that Film Hub Wales allowed them to reach a wider number of Welsh exhibitors, to navigate issues related to Covid closures, and in promoting event screenings in Wales. These 5 titles, THE TOLL, SAVE THE CINEMA, MEN WHO SING, LA CHA CHA and THE WELSHMAN were all films that over performed at the Welsh box office. This could demonstrate the effectiveness of Film Hub Wales' support - but furthermore, it suggests that those distributors that were more engaged with the Welsh elements of their film were more likely to engage with Film Hub Wales and value their support. As per some of the earlier findings, there is a continued correlation between the titles that distributors don't consider to be Welsh, and in this case a lack of successful partnership with Film Hub Wales.

Whilst the two negative responses in the table above focus on a lack of funding and a lack of exhibitor interest, the absence of responses from titles such as CENSOR and SIX MINUTES TO MIDNIGHT suggest that a perceived lack of Welsh connections from the distributor can create a barrier that stops Film Hub Wales from being able to successfully support those titles. Additionally, Film Hub Wales do not offer direct funding for film distribution, and the

comment about this lack of funding shows there is a lack of awareness among some distributors about what Film Hub Wales support consists of. Whilst funding is available to Welsh venues to support their screenings, no applications were made for screenings of DON'T GO GENTLE (of which there were a minimal number in Wales). It is also important to note that not all feature films will receive all items of support. Support can be dependent on initial levels of exhibitor interest in booking a film, the quality and content of a film, and the strength and size of the distributor's marketing campaign (for example, titles from larger distributors such as DREAM HORSE or SIX MINUTES TO MIDNIGHT wouldn't require the full range of Film Hub Wales support.)

## Diversity & Representation

Given the current strides towards improving inclusion and diversity across British film, it was important to examine the gender and ethnicity across the behind the camera roles in the 14 Made In Wales films being analysed in this report.

IMDb was used to confirm the directors, producers and writers on each project. In the case of producers, only those listed as such were taken into consideration, not those listed as Executive Producer, Associate Producer etc. As for writers, only those who authored the screenplay have been accounted for here, not those with a 'Story by' credit. Assumptions about ethnicity and gender are based on as much information as possible that could be sourced on IMDb or elsewhere on the internet, although it cannot be ruled out that someone 'white-passing' may have been counted here as white, rather than an ethnic minority.

The first table shows the gender split across producers, directors and writers of the 14 films.

Gender	Producer	Director	Writer
Female	38%	40%	8%
Male	63%	60%	83%
Other	0%	0%	8%

It is notable that 40% of the directors (6 in total) and 38% of the producers (9 in total) are female, as this is a relatively high number, and a marked improvement on the 2019 - 2020 Made In Wales report, which recorded 28% of producers as female, and only 8% of directors as female. That report also cited 8% of writers (just 1 writer) as female, and that figure is unchanged in the 2021 - 2022 figures. However, it is worth noting that the percentage of male writers has decreased from 92% (11 in total) in 2019 - 2020, to 83% (10 in total) in 2021- 2022. This is on account of the presence of one writer who describes themselves as 'gender fluid', Eddie Izzard, who served as a writer on SIX MINUTES TO MIDNIGHT.

On the other hand, the figures regarding ethnicity are far less promising. A total of 5% of the population of Wales identify as Black, Asian and minority ethnic<sup>16</sup>, and yet not one of the 14 titles being analysed in this report had any directors, producers or writers involved who were not white. This is in fact a minor decrease from the figures in the 2019-2020 report, which lists just 1 producer (or 4%) from an ethnic minority background.

<sup>16</sup> <https://statswales.gov.wales/Catalogue/Equality-and-Diversity/Ethnicity/ethnicity-by-area-ethnicgroup>

A further way to analyse the ethnic diversity amongst the Made in Wales titles is to look at the lead actors that feature on the poster<sup>17</sup> for each of the 9 fiction films featured in this report. Of the 9 films, only 2 featured Black, Asian and ethnic minority actors in lead roles, comprising 3 roles in total. This accounts for 9% of all lead actors across the films.

<b>Ethnic Background</b>	<b>Producer</b>	<b>Director</b>	<b>Writer</b>	<b>Lead actors</b>
White	100%	100%	100%	90.63%
Black, Asian or other ethnic minority	0%	0%	0%	9.38%

Whilst this 9% is in excess of the 5% of the Welsh population who come from those diverse backgrounds, the key issue here is that the roles were confined to just two of the films - and diverse actors would ideally have opportunities to play lead roles in a wider variety of projects. However, this also shows a positive improvement from the 2019 - 20 report, where only 6% of lead actors in the films analysed were people of colour. For audiences in Wales and beyond, it's important to see authenticity and diversity both in front of and behind the camera in Welsh film. This ensures that the stories being told by Welsh talent are as diverse as its population, and that Black and ethnic minority audience members are given the vital chance to see themselves represented on screen.

For the remaining 7 films not featuring Black or ethnic minority lead roles, some did feature in supporting roles. However, in this case the characters were not visible in the film's marketing and as such appear to not be integral to the film's story. This presents a further issue for diversity and inclusion, because although the cast of these films appears to be more diverse, coupled with the minimal amount of lead roles for Black and ethnic minority actors it suggests that the bigger, more important roles are reserved for White actors.

The 2019-2020 report also notes that there was one fully Welsh language title (ANORAC) and one bilingual title (GWEN) released during the period. In 2021 - 2022, there was only one bilingual title released, MEN WHO SING, and no fully Welsh language titles, suggesting an inconsistency in the amount of Welsh language films being produced. It is also notable that MEN WHO SING is a documentary, perhaps indicating that Welsh language use is more likely to occur in documentary films where participants happen to be Welsh speakers, and not in fiction films. However, the next fully Welsh language title to be released, although outside the scope of this report, was GWLEDD (THE FEAST) in 2022, a horror film. Whilst it saw mixed results in Welsh cinemas due to its genre, it shows the potential for wider variety in Welsh language filmmaking.

### **Case Study : MEN WHO SING**

MEN WHO SING is a documentary released by Dartmouth Films across the UK on the 6th June 2021. From Welsh director Dylan Williams (MEN WHO SWIM, THE BORNEO CASE),

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<sup>17</sup> Posters were sourced from IMDb at the time of writing this report in February 2023. On posters with images of the actors, these were used to identify the leads, and for other posters the written list of actors was used instead.

it follows a rapidly ageing male voice choir in North East Wales on the hunt to find younger men in their 40s and 50s to keep the choir going.

With the film having received production funding from Ffilm Cymru and S4C, Dartmouth Films were also able to secure additional funding from Ffilm Cymru for the film's distribution budget. Dartmouth's Founder and Managing Director Christopher Hird acknowledged that one of the biggest challenges of distributing independent documentaries is reaching the potential target audience, and making them aware that the film is being shown in cinemas. He also noted that for many Dartmouth releases, including MEN WHO SING, cinema bookings are often just for one or two screenings, rather than the traditional full week of shows - making it more difficult to get people into the cinema to see the film within a very specific time period.

The funding that Dartmouth received from Ffilm Cymru allowed them to substantially increase the breadth of their marketing strategy. With the funding they could identify where the core audience of the film might exist, by getting in touch with groups including choirs, music societies, and residential homes for older people. They also explored the idea of a 'Take a Granny / Grandpa' project that would provide 2 for 1 cinema tickets, as a way to incentivise younger audiences to go and see the film. Ultimately, the release of the film during a period when Covid restrictions were still in place meant that they weren't able to go ahead with any ticket offers, and struggled to get older audiences to come and see the film in cinemas, but they acknowledged that Ffilm Cymru funding was vital in giving them the resource to explore different marketing strategies for the film.

The film also received the support of Film Hub Wales and screened as part of their Preview Day. When asked if the Preview Day gave them access to any exhibitors they hadn't worked with before, Christopher noted that it was unlikely. Having distributed films in Wales before they have relationships with a number of responsive independent cinemas who booked the film, but they didn't see many exhibitors contact them as a direct result of the Preview Day. They did however note that they worked with some new cinemas on the release of this film that they had not booked films in before, but they can't be sure if this is linked to the work of Film Hub Wales or their own sales efforts. Film Hub Wales noted that following the Preview Day screening of the film, 14 Welsh venues confirmed they had plans to book the film.

Christopher acknowledged that Film Hub Wales did everything they could to support the release, whilst it was enormously handicapped by Covid restrictions. For example, the distributor had hoped to invite groups of elderly people from care homes to see the film in their local cinema, but of course the restrictions around Covid meant that this was not possible. They had also planned to screen the film for the choir itself, another event which had to be cancelled due to the restrictions.

However, Christopher highlighted that whilst Film Hub Wales themselves are very proactive, there is a difficulty in securing bookings from independent cinemas in Wales. He mentioned that with a number of the cinemas being run on a part time or volunteer basis, it can be very difficult to engage with them, as the cinemas are under-resourced. He felt there were a number of venues where the film could have played successfully, but because of difficulties engaging with both the cinema programmers and also sometimes with local organisations, it was hard to bring the film to those audiences.

## Conclusion

Overall, 'Made in Wales' titles released during the 2021 - 2022 period were marginally more successful in attracting Welsh audiences than in the 2019 - 2020 period. As per the previous report, Welsh stories and Welsh talent continue to prove more successful at attracting Welsh audiences but diverse representation across those titles remains problematic. Those titles with less obvious Welsh connections struggle in this area, although this could be as much down to distributors, their release strategy and lack of public investment into marketing, as it is down to audience attitudes. There is also a potential issue of distributors, and the industry as a whole viewing Welsh films as smaller in scope than those produced elsewhere in the UK.

Film Hub Wales face barriers interacting with distributors who aren't engaged with their film's Welsh connections. It is also hard for distributors to quantify the support that Film Hub Wales gives, despite a number of positive comments about working alongside them. There is potentially a larger issue that the independent cinemas in Wales (which make up a large number of the cinemas in the country) are under-resourced and therefore distributors find it hard to connect with them to effectively promote Welsh film. Furthermore, distributors often have small budgets and limited release sizes for 'Made In Wales' films, restricting the scope they have to reach audiences both in Wales and beyond.

## Contacts

To find out more about how FHW supports films with Welsh connections, [visit our website](#).

- **Hana Lewis**, Strategic Manager:  
02920 353 740, [hana@filmhubwales.org](mailto:hana@filmhubwales.org)
- **Lisa Nesbitt**, Development Officer:  
02920 311 067, [lisa@filmhubwales.org](mailto:lisa@filmhubwales.org)
- **Radha Patel**, Made in Wales Officer  
02920 311 063, [radha@filmhubwales.org](mailto:radha@filmhubwales.org)