



Finding Welsh Film Data: 22-23



Following on from our Welsh film data research, running since 2019, we commissioned Delphine Lievens to examine 13 films releasing between April 2022 - March 2023, with the aim of analysing how they performed in cinemas and how our support contributed to their release.



Our Methodology

13*

feature films
(from a total of
16 known titles)



**April 2022 -
March 2023
release dates**



**Range of budgets
and release
strategies**



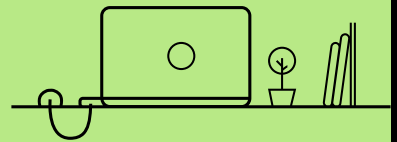
**Distributor,
producer,
financier and
personnel
survey**



**Comscore
data**



**Desk
research**



Made in Wales' films include:

- Welsh talent (director, producer, writer, and principal cast)
- Made by production companies or filmmakers active in Wales
- Films set in Wales or dealing with Welsh stories
- Films in the Welsh language



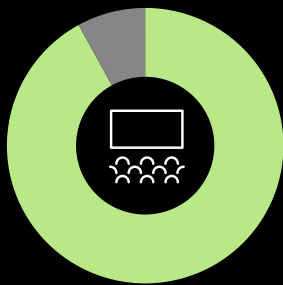
Films



Images from top left:
The Phantom of the Open (© Nick Wall), ***Brian and Charles*** (© Universal Pictures), ***Donna*** (© Truth Department), ***Gwledd / The Feast*** (© Picturehouse Entertainment), ***Off the Rails*** (© Rikke Brewer), ***Burial*** (© 101 Films), ***Catherine Called Birdy*** (© Republic Film Distribution), ***The Silent Twins*** (© Universal Pictures), ***The Swimmers*** (© Netflix), ***Translations*** (© Keith Kopp), ***She is Love*** (© Signature Entertainment), ***The Bronze Men of Cameroon*** (© Iris Films), ***Y Sŵn*** (© Jojo)

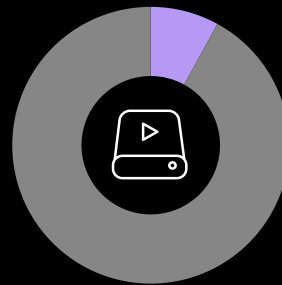
Our Findings

Distribution



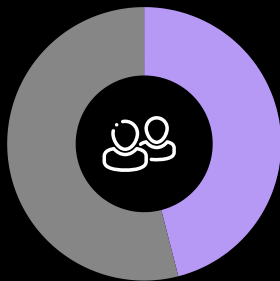
92%

theatrically
distributed



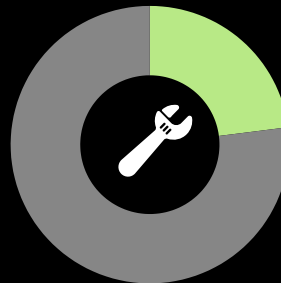
8%

VOD only (1 film)



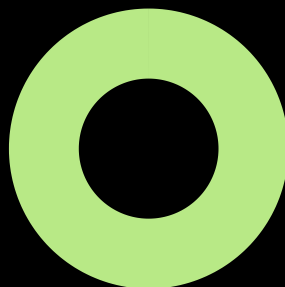
46%

limited release
(less than 100 sites)



23%

self - distributed
films



100%

offered exhibitor
previews

Performance



1 film grossed in excess of **£1m** at box office (£2m)



Next highest performing film grossed over **£100k** (£300k)



£2.5m in box office across the UK & Ireland



332,955 admissions in UK & Ireland



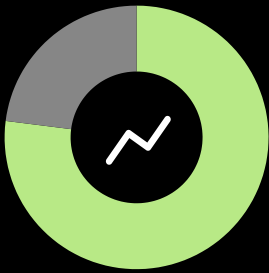
£124.8k (4.9%) of box office in Wales



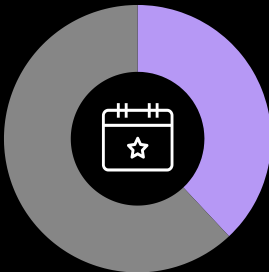
17,620 admissions at Welsh sites



Welsh market share in 2022 (3.11%) and 2023 (3.16%).



77% of the distributors submit data to Comscore - this does not include non-theatrical data, meaning admissions could be higher.



38% films received special event screenings (i.e. premieres, Q&As, cast and crew screenings) in Wales.



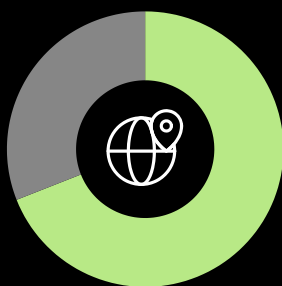
100% received press coverage, predominantly online reviews. *Gwledd* and *Y Sŵn* had strong coverage across Welsh-specific press. All had some mention of a Welsh connection but in some cases, this was minimal.



Film Fact:

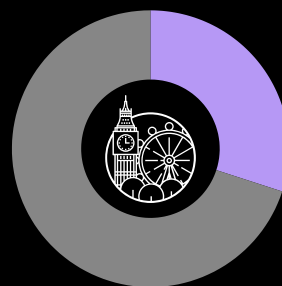
£2.5 million grossed across 9 films, which is more than double the '21-'22 report gross of £1.1 million, and far exceeds the '20-'21 report total of £392,289. This aligns with 22/23 box office recovery but the majority of this success can be attributed to the widest releases backed by larger distributors. The films from smaller distribution companies show a larger disparity in box office, demonstrating that the 22/23 marketplace was challenging for independent films. 911 films released in 2022, whereas in 2021 only 503 films released, meaning independent films released during the 20/21 pandemic could reach wider audiences, due to less competition from blockbusters.

International Reception



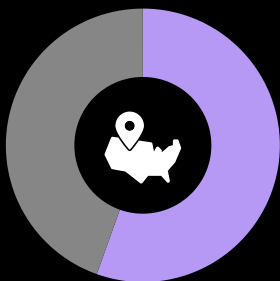
69%

international
theatrical release



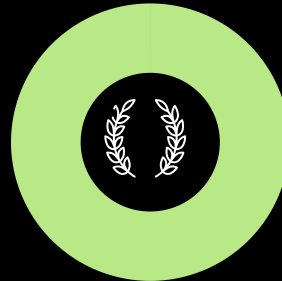
30%

premiered at
London Film
Festival



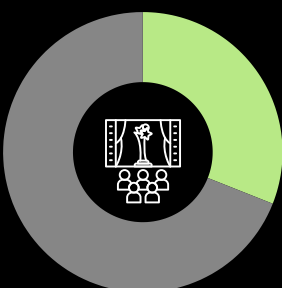
61%

screened in cinemas in
North America



100%

secured at least
one film festival



31%

major international film festival premieres ((Sundance,
SXSW, Toronto)

Film Fact:

Despite a slight reduction in overall festival screenings by films in this period, many of the titles played at smaller festivals internationally, including genre-specific events. Whilst smaller in scale, many of these festivals convey a level of prestige. *Gwledd (The Feast)* screened at horror specialist festivals Sitges and Fantasia, *Off the Rails* screened at Sheffield Doc Fest, and *Donna* had its international premiere at US based LGBTQ+ fest Frameline.

Finance



Distribution campaign budgets ranged from **£0-15k**



5 distributors considered this confidential and were not included in analysis.



15% (2 films) received BFI production funding (increase from 7% in 21)



31% (4 films) received Ffilm Cymru Wales Production funding (increase from 14% in 21)



0 received a Creative Wales award (decrease from 1 film in 2020)*1.



1 title received BFI distribution funding (Gwledd)



1 title received FFCW distribution funding (Donna)

Spotlight:

CEO of FFCW Lee Walters was interviewed about the 4 films they supported. *Off the Rails*, *Donna*, *Gwledd* and *Burial* reached over 30 territories including Wales. Welsh investment ranged from 5.2% (*Burial*) to 51.2% (*Donna*). Resource is a barrier for small film teams. They can apply funding for a publicist or impact producer (capped at 25k) to enhance reach in Wales, informed by the UK distributor's plans. Piecemeal financing structure can delay early audience development work and broader or international appeal may be prioritised over Welsh-focused marketing by the sales agent. Lack of Welsh sales agents and a national film festival with markets can hinder visibility but films may secure TV, digital platforms or educational resources. Understanding of the producers' challenges could help to reach more local audiences. FFCW's have since received additional funding from Creative Wales although the focus of this is on direct production funding as opposed to distribution.



Image: Donna (© Truth Department)

Film Hub Wales Support



100% films were listed in the catalogue and promoted via social media and newsletters.



38% (5 films) were shown to exhibitors at Welsh Film Preview Days and 77% (10 films) in the online preview room.



38% (5 films) received bespoke assets or support.

Spotlight:

There is a clear correlation between titles that received the most comprehensive support from FHW over longer periods (*Y Sŵn*, *Gwledd*, *Brian and Charles*, *Donna* and *Bronze Men of Cameroon*) and their higher than average market share of cinemas and/or theatrical box office in Wales. Distributors largely value the FHW connections to a wider pool of exhibitors and outreach support offered. Suggestions to improve the service includes the creation of a 'Welsh film market' (industry facing event promoting Welsh titles looking for production funding, distribution opportunities) and direct funding for distribution. Both are currently outside of FHW's exhibition remit, which suggests lack of awareness about the Hub's function and / or lack of clarity resulting from limited industry support.



Image: Brian and Charles (© Focus Features)

“Your support was invaluable to our release. Your help aided our overall communications around the film and raised wider awareness of the film itself. You helped with both outreach and our work with a range of partners. You also provided key support in relation to a wide range of exhibitors and the work they were doing. In summary, your support helped to elevate the film and bring it to a wider audience.”
- Distributor

Spotlight:

Portrait of Kaye, was excluded from this report due to its lack of official theatrical release and associated data. However, the support for the film from FHW led to the film receiving a Bafta Cymru nomination.

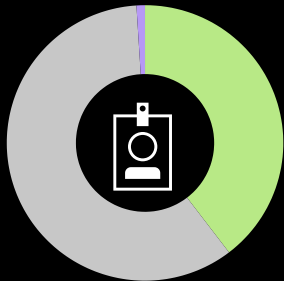


“Made in Wales’ enthusiasm and assistance has really helped raise the profile of what some consider to be a fairly unusual documentary project. Their support has been massively important given the film’s DIY origins and DIY distribution; without this kind of collaboration a film of our small means would likely lay unseen in UK cinemas.”
- Director

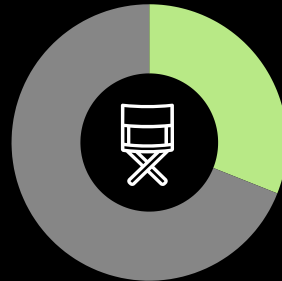
Equality and Inclusion



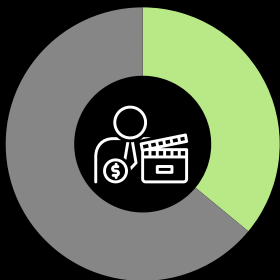
104 people were identified as key talent on the 13 films (listed credits as producer, director, writer or lead actor).



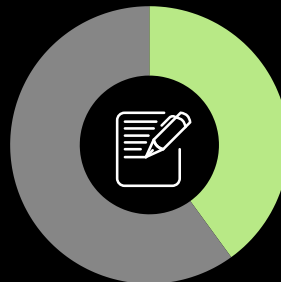
40% female, 60% male roles, 1% non-binary, (producers, directors, writers, lead actors)



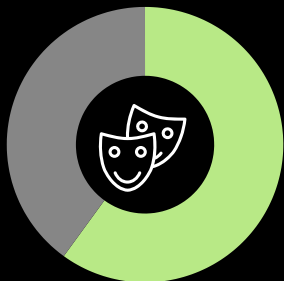
31% Female directors (decrease from 40% in 2021–22, 8% in 2019–20).



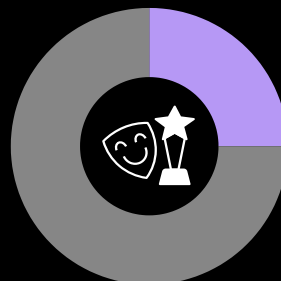
36% Female producers (38% in 2021–22, 28% in 2019–20).



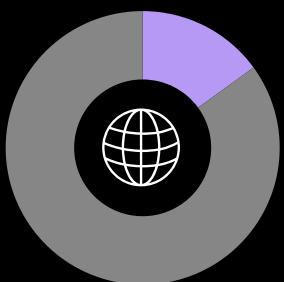
40% female writers (significant increase from 8% in both prior reports).



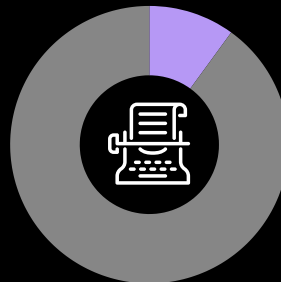
60% female/non-binary lead actors (a new metric).



25% Black, Asian and Global Majority lead actors (increase from 9% in 2021–2022).



15% Black, Asian and Global Majority producers and directors (increase from 0% in 2021–2022).

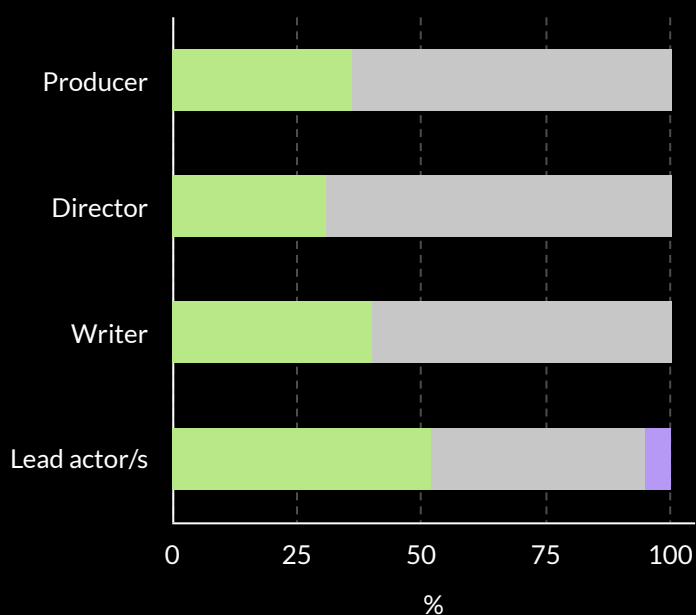


10% Black, Asian and Global Majority writers (increase from 0% in 2021–2022).

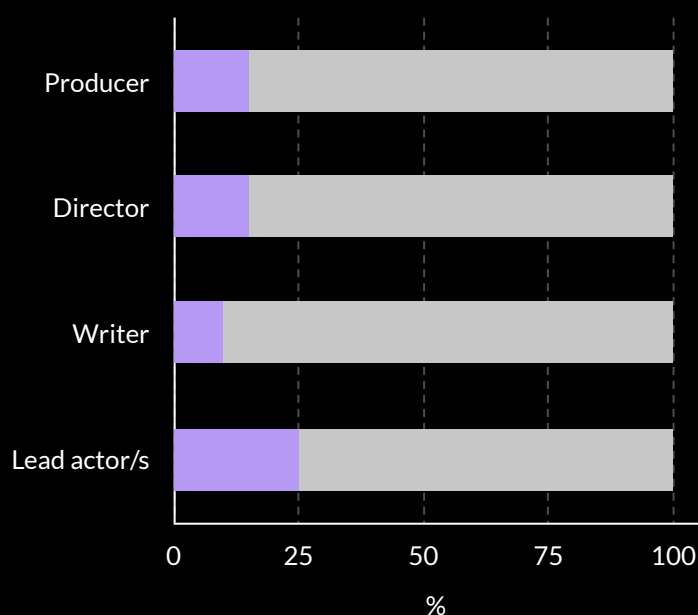
Context:

The improvement in Black, Asian and Global Majority representation aligns with the Welsh population, at 5%, suggesting progress in reflecting diversity in Welsh cinema. Intersectionality (e.g., individuals who are both female and BAME) is not fully captured. Lack of data prevents analysis of LGBTQ+, d/Deaf, disabled, or neurodivergent representation. These limitations highlight the need for more comprehensive data collection in future reports.

Breakdown by role



Female Male Non-binary/Other



Black, Asian & Global Majority White

Language



23% (3/13) titles in Welsh language (increase on 0 in 21/22)



1 bilingual (no change on 21/22)



61% English language only



15% (2/13) titles international titles with English (Arabic, French, Bamum)



15% (2/13) titles received Welsh marketing materials from distributors (increase from 0 in 21/22)



Welsh language films had high engagement in Wales.

Y Sŵn (**93%** of admissions),

Gwledd (The Feast) (**21%** of admissions).

Spotlight:

When it comes to Welsh language marketing materials, filmmakers and distributors often think about the language of the film itself, rather than the audience they are selling that film to. Distributors mention a lack of funding, or the film not being 'Welsh enough' as reasons for not producing these materials, as well as an assumption that it hasn't been done before. It's estimated that 29.2% of the Welsh population can speak Welsh, so producing Welsh marketing materials would be a way for distributors to build a connection with Welsh audiences. Marketing materials could also reflect the native language of the filmmakers/stories, aiming to connect with Welsh audiences.



Case Study: Gwledd / The Feast

Gwledd was released by Picturehouse on 19 August 2022. It has a Welsh director, producer, writer, cast, filming locations and funding.

A wealthy family hosts a tense dinner party in their remote Welsh estate, with a valuable mining venture at stake. The arrival of a mysterious waitress begins to unravel the family's illusions, leading to slow, unsettling, and terrifying consequences.

- *Gwledd (The Feast)* grossed £71,302 across 184 cinemas, with 21.4% of revenue from Welsh cinemas (19% of sites).
- BFI Audience Fund enabled Welsh language access materials, marketing, and a Wales-focused Q&A tour.
- Film Hub Wales connected distributors to new Welsh cinemas and supported marketing efforts including a video Q&A and editorial.
- Two Welsh cinemas ranked in the UK & Ireland top 10 box office sites for the film; Chapter (Cardiff) was #2 and Pontio (Bangor) was #8
- Released in 26 Welsh cinemas (16 multiplexes, 10 independents), exceeding the standard for similar releases.
- Box office underperformed due to competition (*Orphan: First Kill*), 18+ rating, and post-COVID market challenges.

Key Findings:



Welsh language materials and targeted efforts in Wales were innovative and helped connect with audiences / independent cinemas, particularly in North Wales.



Welsh cinemas outperformed their share of sites, reflecting strong regional engagement



Welsh-specific materials helped to attract interest but were not sufficient to overcome broader challenges in the marketplace.



Multiple factors, including competition, the 18+ rating, and post-COVID audience hesitancy, hindered overall box office results.



The involvement of the BFI Audience Fund and Film Hub Wales significantly enhanced the film's ability to engage Welsh audiences, though long-term effects are harder to measure.



Case Study: Translations

Translations was a low-budget film, released 2 June 2023, self-distributed due to difficulty securing a distributor. It has Welsh cast, locations and funding.

Years after her brother's death, Stef has secluded herself at home. When Evan, her brother's best friend, arrives to return Liam's journal, a connection forms between them. As they confront their shared trauma, they must decide if their relationship can ever escape the past.

- The film screened in 9 cinemas, 3 in Wales, grossing just under £2,000, with 27.3% of the gross from Welsh cinemas.
- Filmmakers funded distribution through external support, using persistence and direct outreach to secure screenings and cover expenses like DCP creation and BBFC certification.
- Due to capacity, Film Hub Wales offered limited support, mainly through social media, newsletters and listing the film on their website,
- Q&A sessions and special screenings were well-received, especially in Wales, with strong connections to local audiences.

Key Findings:



Persistence and direct engagement with cinema programmers were critical in securing screenings.



A targeted, grassroots marketing strategy proved effective for this small-scale release.



Limited distribution funds and reliance on external support for costs were key challenges.



Strong local audience connection in Wales, with a positive reception of the film's Welsh themes and language.



Film Hub Wales' support was helpful but could be more substantial in terms of programming.



Conclusions



Titles saw **mixed theatrical results** mixed theatrical results, still recovering from the impact of the pandemic.



There are **gaps in data** particularly non-theatrical performance and EDI statistics.



Special event screenings in Wales with **talent were limited** which may affect awareness.



There were **2 high profile releases** but higher Welsh market shares of Box office came from smaller, more focussed releases.



As a result of the 2 extensive releases, the 13 'Made in Wales' releases analysed, was just **4.9% market share** less than half of what it has been in previous years.



3 titles provided **Welsh language marketing** materials for their film, which arguably helped boost their success in Welsh cinemas and can act as a tool to reach audiences.



A **financial commitment** and **additional platforms** are needed from funders and distributors to make titles more visible to Welsh audiences, especially for self-distribution.



Made in Wales has been positively received but due to **gaps in support services** there's expectation that it should do more work, which falls outside of its remit.



Significant **improvements** can be seen across EDI data.

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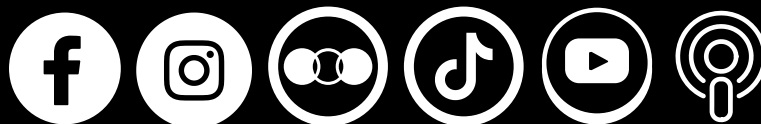
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