

# Finding Welsh Film Data 2024 - 2025

A report by Toki Allison for Film Hub Wales' Made in Wales project

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 \(FHW\)](#) 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. This included limited ways to find out what Welsh films were available and how to book them, ways to preview or watch Welsh films before programming them, lack of central marketing around Welsh connections and support to engage with distributors so that Welsh cinemas could establish relationships.

All of these issues were explored through FHW's earlier 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 marketing for films with Welsh connections where resource allowed. With Creative Wales investment, their Made in Wales strategy builds on these elements and gives focus to the exhibition of films with a Welsh connection through programming support, marketing and press strategies, plus the creation of added value assets such as a Made in Wales podcast, digital Q&As with talent and thematic editorial pieces. They are interested in rooting out stereotypes about Wales, giving voice to diverse and interesting stories from 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. Further reports by Delphine Lievens followed, for 21/22 (examining 14 films), 22/23 (examining 13 films), and 23/24 (examining 15 films), looking at releases from April - March. All these reports provide analysis that allows for annual reflection and comparison of the performance of Welsh films.

This report will follow the same principle and a similar format, examining a further 16 titles released between April 2024 - March 2025, with the aim of analysing audience performance and how the support of Film Hub Wales contributed where relevant. Comparisons will also be drawn with findings from previous reports to see if there are any emerging trends.

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,
- Films in the Welsh language.

We recognise that other criteria could be referenced which would result in a film having Welsh connections but for the purposes of comparable data and selecting films through a consistent approach, these are the criteria by which 'Made in Wales' films are selected for inclusion in the project.

# Methodology

16 feature films, released between April 2024 and March 2025 were selected by FHW for analysis in this report. All of these titles had some element of support or communication with Film Hub Wales as part of their 'Made in Wales' strand.

In order to gather information, an online survey was sent to the distributors of each chosen film, containing questions on box office results, release strategy, and engagement with Welsh cinemas and audiences. Not all of the survey questions were completed. 11 of the 16 titles have completed surveys.

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

The report features two brief case studies, one of a film that was released through professional distribution, another that was self-distributed by the filmmaker. There are also interviews with funders, Ffilm Cymru Wales and BFI (British Film Institute).

This report includes redactions regarding some of the films featured, at request of the rights holders. Context is provided to ensure insights are still relevant.

# Executive Summary

This benchmarking report continues work begun in 2020 by Film Hub Wales to interrogate the landscape of Welsh connected films. It looks at how external impacts and the work of the Made in Wales project influenced a sample of 16 titles between April 2024 and March 2025. Of this sample, distributors or production companies responded to a survey, providing information about 11 titles.

The report considers wider industry context, as well as focusing on the domestic picture of Welsh film within Wales.

## Overview

- All 16 films in the selection had a theatrical release in the UK & Ireland.
- 3 were self-distributed by production companies/ filmmakers.
- 11 had an international theatrical release.

- 12 titles were released on VOD.
- Two titles achieved above £250k box office, and a further three titles achieved over £100k.
- Only 4 titles exhibited at 100+ sites across the UK & Ireland.
- Overall, the 13 titles with available data accounted for £1.18m in box office takings across the UK & Ireland

### **Performance in Welsh Cinemas**

- 10 of the titles reported their box office income collectively at £45.6k within Wales, a 4% share in these titles' total UK & Ireland box office.
- Four of these 10 films achieved a higher than average box office share in Wales,, two averaged at 4%.
- Four fell below the Welsh share average.
- Five titles ranked higher than the average number of Welsh sites at 8.6%.

### **Engagement & Marketing**

- No films were provided with Welsh language marketing materials.
- Eight out of the 16 films received some sort of outside-Wales press or media attention that featured reference to the Welsh connection.
- Seven films got coverage in Welsh media, one of these titles was solely due to FHW press efforts.
- The films which were more explicitly connected to Welshness by media were *Chuck*, *Chuck Baby*, *Timestalker*, and *On Becoming a Guinea Fowl*.
- All distributors / filmmakers provided trailers, and many provided posters, social media assets and other media for publicity.

### **Release & International Reception**

- 13 films were offered to exhibitors as a preview screener ahead of booking.
- The average release window was 2 months, with some titles made available to book for many months.
- International reach of titles is a reflection of the scale of the productions, with large multi-territory co-productions grossing most worldwide.
- Six films played at major international festivals including TIFF, LFF, SXSW and Cannes.
- Seven films won awards, including *On Becoming a Guinea Fowl*, which took home Un Certain Regard Best Director from Cannes.

### **Budgets and Funding**

- Three films had distribution budgets under £5000, the highest report campaign costs of £65,000. The highest grossing films did not disclose their budgets.
- In general, distributors spent either in line or below their usual levels,
- There was a 50:50 split in perception of films performing as well or not as expected.
- Three films received BFI production funding, seven had international distribution and film sales/ festival launch support, one received a BFI UK distribution fund.
- Four films received impact funding for distribution or exhibition, and six received production funding from Ffilm Cymru Wales.

- Three films received production funding from Creative Wales/ Welsh Government.

### **Support from Film Hub Wales**

- Seven responding distributors felt supported by FHW and that input from the team had made a difference to their campaigns.
- Nine films were made available to exhibitors in the online Preview Room.
- Seven titles featured across three in-person preview events, three at the 2024 Welsh Film Preview Day.
- Ten titles received bespoke assets and tailored support.
- One distributor stated: "The support made a very limited release possible."

### **Diversity & Representation**

- Representation of women in on- and off-screen roles increased on the previous year's report by 7% on average, across directors, producers, writers and lead actors.
- Global Majority representation increased by 23% across the roles on average.
- Characteristics such as LGBTQIA+, Deaf, disabled, neurodivergent and working class status were assessed to set a baseline.
- There were no films in Welsh language, one was in Lao, and three were bilingual English (with Hindi, Bemba, Arabic).

## **Analysis**

### **Overview**

16 films released between April 2024 and March 2025 were selected for the purposes of this study. All of the films were considered to be 'Made in Wales' by FHW because they had notable Welsh connections. All 16 films received a theatrical release in the UK, with some of the smaller titles screening non-theatrically (in alternate cinema spaces) as well.

This is a healthy increase on the number of titles screening theatrically in the year before, where only nine of the 15 made it to the big screen, and a return to more usual practice, as with 22/23, where 12 of 13 films received theatrical releases; in 21/22, 13 of 14 films released theatrically.

Some key headlines for the period 24/25 help to set the context for cinema globally and domestically.

#### *The broader context*

6752 films released globally in 2024. April 24–March 25 was shaped largely by the 2023 Hollywood strikes, which delayed productions and reduced the number of films available for theatrical release. The global box office reached \$30 billion in 2024, a 7% decline from 2023. (Gower Street Analytics) Admissions globally totalled 14 billion, with Asia-Pacific accounting for 7.2 billion and North America 2.3 billion. (Market Reports World)

### *Audience behaviour*

A 2024 NRG industry study found that only 25% of cinemagoers attend at least every other month, compared with 40% pre-pandemic. US ticket sales were down roughly 40% from a decade ago, while average ticket prices rose approximately 35% over the same period. Approximately 74% of audiences still visited cinemas during the period, with around 61% of streaming subscribers having watched at least two films in theatres over the preceding six months. (ID Times)

### *The theatrical window*

From a pre-pandemic 90 days, the theatrical window compressed to approx. 35–40 days during 24/25. This affected independent titles in particular, which typically rely on longer runs to build audiences through word of mouth.

### *Premium experiences*

The average premium-screen ticket in the US reached \$16.86 during this period, compared with \$11.98 for a standard seat. Loyalty programme subscriptions grew by 12% from 2023 to 2024. (Cinema United)

### *The UK*

The UK and Ireland recorded 138.2 million admissions in 2024, a fourth consecutive year of growth (Film Distributors' Association). The market share for UK independent films rose to 6.9% from 3.8% in 2023, with the combined box office for the top 20 UK independent films reaching £63.9 million - almost double the 2023 figure of £33.7 million. (Screen Daily)

2023 saw both eOne and Pathé, two established UK distribution companies, withdraw from UK theatrical. eOne had been theatrically releasing 35 films a year in the UK. By the time of its closure it had released only three films in its final year of operation.

Of the top 50 films of 2024, 46 were released by studios, showing a gap in the distribution market. MUBI became a more significant distributor for theatrical and True Brit Entertainment emerged as a new outfit, devoted to releasing British films. Vue Cinemas also launched its own distribution arm, Vue Lumière.

### *Wales*

Head of Film Hub Wales Hana Lewis noted that Welsh exhibitors "*continue to adapt to the ever-changing environment they find themselves in, caused by factors such as the cost-of-living crisis as well as wider political, cultural and environmental issues that affect their communities. Their small teams have never been busier, with a growing need to attract audiences and secure external funding.*" Welsh exhibitors responded by diversifying their programming, introducing community screenings, targeting specific audience groups, and running themed seasons tied to cultural awareness dates.

### *Cost of Living and Streaming*

The cost of living crisis had an impact on UK cinema audiences during April 2024–March 2025. Though inflation had eased from an 11.1% peak in October 2022 to around 2% by mid-2024, the effect on household budgets meant that 24% of adults were still finding it difficult to cope financially as of May 2024.<sup>1</sup> UK box office revenue in 2024 totalled £979 million - 22% below 2019's pre-Covid figure - and the average annual spend per head on cinema fell to £14.45, equivalent to roughly two visits per year.<sup>2</sup> With a monthly Netflix subscription available for less than £5 a month, streaming continues to compete as a low-cost film viewing alternative, and Ofcom stated that 68% of UK households subscribed to at least one streaming service by 2025.<sup>3</sup>

DCM's James Linay is quoted in the Media Leader: *"The real concern is that while tentpole films drive cinema attendance, consumers appear to be staying home to watch smaller genre films. A comedy that might have earned £20 million a decade ago will earn £5 million today."* However, further signs of recovery have been seen. Ticket sales at the 2025 UK-Ireland box office increased by 1% year-on-year to hit £1.1bn in 2025. This marginal increase spells the strongest post-pandemic year to date (Comscore).

### *The Welsh Picture*

Continuing a trend set in the previous years, very few Welsh connected titles released through major distributors with only *Seize Them* landing through Entertainment Film and *On Becoming a Guinea Fowl* getting picked up by commercial-arthouse distributor Picturehouse. There were no releases associated with Wales from the bigger distributors such as Universal, Warner Bros or Disney for this period.

Beyond this, 11 titles were released by independent distributors, with three titles self-distributed by the filmmakers themselves.

The spike in new releases year on year in the UK and Ireland, that was applicable last year, has stagnated at above 1000+ titles, growing from 504 in 2021, to 929 in 2022, 1015 in 2023, to a high of 1114 in 2024<sup>4</sup>. 2025 sees 1092 new releases<sup>5</sup> in 2025, a drop of 22 titles on the previous year.

The films being assessed in this report are listed below. We received box office data against eight titles from Comscore and conducted research through BoxOffice Mojo on a further five titles, which surfaced UK box office figures but no Welsh site specifics. We tracked Welsh

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<sup>1</sup> High cost of living: Impact on households, House of Commons Library  
<https://commonslibrary.parliament.uk/research-briefings/cbp-10100/>

<sup>2</sup> Cinema closures increasing: the battle between streaming services and cinemas, Hybrid Magazine  
<https://www.hybridmag.co.uk/p/cinema-closures-increasing-the-battle>

<sup>3</sup> Further findings from our latest look at the UK's media habits, Ofcom  
<https://www.ofcom.org.uk/media-use-and-attitudes/media-habits-adults/further-findings-from-our-latest-look-at-the-uks-media-habits>

<sup>4</sup> [Film Distributors Association Annual Box Office](#)

<sup>5</sup> UK and Ireland annual box office exceeds £1bn for third consecutive year, Film Distributors Association <https://filmdistributorsassociation.com/2026/01/uk-and-ireland-annual-box-office-exceeds-1bn-for-third-consecutive-year/>

sites and box office directly across ten titles, and we have survey data for 11 titles around film campaigns, providing varying degrees of insight into box office.

| Film Name                           | Distrib / Rightsholder    | Release          | Type of release |
|-------------------------------------|---------------------------|------------------|-----------------|
| Seize Them                          | Entertainment Film        | 5 April 2024     | Theatrical      |
| Swede Caroline                      | Picnik Ent                | 19 April 2024    | Theatrical      |
| The Almond and the Seahorse         | Picnik Ent                | 10 May 2024      | Theatrical      |
| Freud's Last Session                | Vertigo                   | 14 June 2024     | Theatrical      |
| Unicorns                            | Signature                 | 5 July 2024      | Theatrical      |
| Chuck Chuck Baby                    | Studio Soho               | 19 July 2024     | Theatrical      |
| Gaza A Story of Love and War        | Mike Joseph               | 14 August 2024   | Theatrical      |
| Kensuke's Kingdom                   | Modern Films              | 2 August 2024    | Theatrical      |
| Starve Acre                         | BFI                       | 6 September 2024 | Theatrical      |
| Timestalker                         | Vertigo                   | 11 October 2024  | Theatrical      |
| Portraits of Dangerous Women        | Bulldog Film              | 11 October 2024  | Theatrical      |
| India's 1st Best Trans Model Agency | Cosmic Cat                | 15 November 2024 | Theatrical      |
| Comrade Tambo's London Recruits     | Barefoot Rascals          | 22 November 2024 | Theatrical      |
| On Becoming a Guinea Fowl           | Picturehouse              | 6 December 2024  | Theatrical      |
| The Walk                            | Together Films            | 1 December 2025  | Theatrical      |
| Satu - Year of the Rabbit           | Sandwich Club Productions | 14 March 2025    | Theatrical      |

Below is a breakdown of the total UK & Ireland box office takings for all of the theatrically released titles, where information is publicly accessible online. Further details, submitted confidentially by distributors and filmmakers, including number of sites screening titles, have been synthesised into this report's findings, but have not been made identifiable so have been omitted from these tables showing granular information. Admissions figures have been estimated based on box office income. The admissions estimates were generated by dividing total box office by the 2024 UK average cinema ticket price of £7.73<sup>6</sup>. Welsh estimates for admissions and box office share are shown in a later table, where data is publicly accessible. Insights that collate these data with confidential submissions to provide a broader context are supplied as overview.

Three titles have been excluded from box office analysis due to no data being made available, through the filmmakers, distributors or agencies – *The Walk*, *India's 1st Best Trans Model Agency*, and *Comrade Tambo's London Recruits*. It should be noted that some data is partial, as it is reliant on the information gleaned from Comscore and Box Office Mojo databases, and does not capture all non-theatrical screenings.

<sup>6</sup> As per the UK Cinema Association website: <https://www.cinema.uk.org.uk/the-industry/facts-and-figures/uk-cinema-industry-economics-and-turnover/average-ticket-price/>



In contrast to admissions figures, which show a steady incline in the years post-Covid, UK box office income plateaued between 2023 and 2024 increasing again in 2025 – £902m in 2022, £978.5m in 2023, holding at £978.1m in 2024, up to £989.5m in 2025. Notably, there is also a 3.6% increase in average ticket price, up from £7.73 in 2024 to £8.01 in 2025. Most of the Welsh connected titles that we’re assessing fall within release during 2024 however, so we have estimated admissions using this 2024 figure. Unfortunately, income is still a reasonable way off from pre-Covid rates of £1.25bn.<sup>7</sup>

| Film Name                           | UK box office | UK admissions (est) |
|-------------------------------------|---------------|---------------------|
| Freud's Last Session                | 277,267       | 35,869              |
| Seize Them                          | 269,320       | 34,841              |
| Kensuke's Kingdom                   | 198,035       | 25,619              |
| Timestalker                         | 130,698       | 16,908              |
| Starve Acre                         | 123,437       | 15,969              |
| On Becoming a Guinea Fowl           | 52,335        | 6,770               |
| Swede Caroline                      | 47,633        | 6,162               |
| Unicorns                            | 38,467        | 4,976               |
| Chuck Chuck Baby                    | 23,755        | 3,073               |
| Portraits of Dangerous Women        | 15,843        | 2,050               |
| The Almond and the Seahorse         | 3,241         | 419                 |
| Satu - Year of the Rabbit           | No data       | No data             |
| Gaza A Story of Love and War        | No data       | No data             |
| India's 1st Best Trans Model Agency | No data       | No data             |
| Comrade Tambo's London Recruits     | No data       | No data             |
| The Walk                            | No data       | No data             |

Table notes:

- Figures are sourced either from Comscore or through direct submission to FHW by the filmmaker/distributor. Those shown are publicly accessible through Box Office Mojo.
- Exchange rate in use is 0.74 GBP£ to USD\$ as at 21/2/25
- Admissions are estimated on UK ticket price of 7.73 average for 2024 releases (source: UK Cinema Industry Economics and Turnover reporting by UKCA)

This year, in contrast to previous years, there were no major blockbuster titles, like *The Creator* in 23/24 or *The Phantom of the Open* in 22/23, reflected in the size of distributors included in the 2025 film list. Two titles achieved above £250k box office, and a further three

<sup>7</sup> UK cinema admissions and box office

<https://www.cinemauk.org.uk/the-industry/facts-and-figures/uk-cinema-admissions-and-box-office/annual-box-office/>

titles achieved over £100k. These five reasonably high performing indie titles show a more consistent offer of Welsh connected cinema against previous years, and were supported by healthier marketing campaigns from more established independent distributors.

There was one exception which achieved above £50k at box office. The lowest performing titles with data available were all debut titles by first time directors, and included self-distributed films.

When considering average admissions per site, the three best performing titles suggested there may have been appetite for more screenings, or availability of these titles for theatrical screenings than cinemas could offer.

|                                                              | UK box office £ | Welsh box office £ | UK admissions (est) | Wales admissions (est) | Welsh box office % + admissions (est) |
|--------------------------------------------------------------|-----------------|--------------------|---------------------|------------------------|---------------------------------------|
| TOTALS (on 10 titles where comprehensive data was available) | 1,132,398       | 45,641             | 146,494             | 5,904                  | 4.03%                                 |

10 of the 16 titles have comprehensive data across the sample and could be included in comparisons to pull out a Welsh box office income and admissions estimated share of 4%. In comparison to previous years, this shows an increase on 2023-24's share of 3.27%. Of note for 2023-24 however, is that two titles skewed the figures with one being a major blockbuster hit (*The Creator*) and another title screening solely in Wales (*Twin Town*). With those removed, a share of 5.96% was achieved, notably higher than the share in this period. The 4% achieved here tallies more with the drop shown around 2023 - 4.9% in 2022-23, 13% in 2021-22, 11% in 2020-21 - and a lower market share in comparison to Welsh population figures at 5.2% noted in the 2021 Census.

## Performance in Welsh cinemas & engagement with Welsh audiences

The tables below show the estimated Welsh share of box office income and admissions (estimated based on box office and average ticket price for the period). Ten titles offer confidential comprehensive data where UK and Welsh admissions and sites can be tracked. The resulting average Welsh box office share was 4% and number of sites 8.6%.

| Film Name | UK box office | Welsh box office % + admissions (est) |
|-----------|---------------|---------------------------------------|
|-----------|---------------|---------------------------------------|

|                                     |         |         |
|-------------------------------------|---------|---------|
| The Almond and the Seahorse         | 3,241   | 46.74%  |
| Chuck Chuck Baby                    | 23,755  | 10.78%  |
| Portraits of Dangerous Women        | 15,843  | 9.15%   |
| Kensuke's Kingdom                   | 198,035 | 5.17%   |
| Timestalker                         | 130,698 | 4.13%   |
| Unicorns                            | 38,467  | 4.09%   |
| Seize Them                          | 269,320 | 3.86%   |
| Freud's Last Session                | 277,267 | 2.90%   |
| On Becoming a Guinea Fowl           | 52,335  | 2.61%   |
| Starve Acre                         | 123,437 | 2.48%   |
| Swede Caroline                      | 47,633  | No data |
| Satu - Year of the Rabbit           | No data | No data |
| Gaza A Story of Love and War        | No data | No data |
| India's 1st Best Trans Model Agency | No data | No data |
| Comrade Tambo's London Recruits     | No data | No data |
| The Walk                            | No data | No data |

The data shows that *The Almond and the Seahorse* and *Chuck Chuck Baby* outperformed the other titles in Wales, with high shares of box office, admissions (46.7% and 10.8%) and sites. It could be inferred that one contributing factor may be these titles having close and more highlighted Welsh connections in their promotional campaigns through the directors' proud Welsh identities and use of Welsh locations. However, it's also reasonable to assume that higher figures in Wales were attributable to the film being available to more Welsh audiences at more Welsh sites (and increased likelihood of sites booking because of those Welsh connections).

Beyond these titles, *Portraits of Dangerous Women* and *Kensuke's Kingdom* also performed above the average, with above average share (9.1% and 5.2%) and number of sites in Wales.

Two further titles averaged across the group, and four more that could be accurately measured, show a reduced share of Welsh box office and admissions relative to the average, with fewer sites programming the selection in Wales.

Interestingly, the metric showing Welsh admissions per Welsh site revealed higher indexes on five titles from the sample. Arguably, larger audiences overall might have been achieved if these titles had reached more sites in Wales.

In terms of publicity, *Chuck Chuck Baby* and *Freud's Last Session* were notable for receiving multiple references to their Welshness in UK media. These were included in five titles that achieved a reasonable level of press attention across the UK, with six or more articles. The remaining titles all picked up some level of UK media coverage, from just one article up to five. Within Welsh media, only seven titles of the sixteen received mention of their Welsh

connections, and only in a single publication in most cases. *Satu- The Year of the Rabbit* and *The Almond and the Seahorse* were included in two Welsh publications.

## Language

None of the 2025 sample were in the Welsh language, as with the 2024 selection. Three films were in English but with other languages – *Unicorns* with Gujarati, *Freud's Last Session* with German and Hebrew, and *On Becoming a Guinea Fowl* with Bemba. Only one film was in another non-English language entirely, which was Lao for *Satu - Year of the Rabbit*.

No films were offered with Welsh language marketing materials by distributors or filmmakers. Reasons given included lack of budget, lack of time, films not being Welsh or not being Welsh enough, films not being big enough, not wanting to raise expectations that the film would have Welsh subtitles, and an understanding that Film Hub Wales or venues would do this themselves. This suggests that wider communication about the limitations of exhibitors and FHW in delivering Welsh language assets could be useful, alongside publicising the impact of how Welsh language materials can support audience development.

There continues to be a substantial number of Welsh speakers in Wales. *"For the year ending 30 September 2023, the Annual Population Survey estimated that 29.2% of people aged three years or over were able to speak Welsh. This figure equates to around 891,800 people."*<sup>8</sup>

Communicating directly with these audiences around cinema using Welsh is a wise strategy to building meaningful engagement, and can result in stronger and more effective campaigns, regardless of whether the film is made in Welsh. In a report by the Welsh Language Commissioner, featuring data by Citizens' Advice Bureau, *"82% of respondents said that they are more inclined to choose a company that provides a good Welsh language service,"* with *"90% feeling that being able to deal with organisations in Welsh makes them feel valued as a customer."*<sup>9</sup>

## Marketing Materials & Campaigns

The following titles were supplied with varying levels of marketing materials to support publicity campaigns, with some films offering special events or screenings in Wales.

*Swede Caroline* – Distributor Picnik was aware of the film's Welsh connections and planned "Focused Welsh screenings where possible in addition to targeting of exhibition".

Materials supplied: Deck, trailer, flyers

Special events in Wales: Q&A with Celyn Jones, film's director

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<sup>8</sup> [Welsh Government: Welsh language data from the Annual Population Survey: October 2022 to September 2023](#)

<sup>9</sup> [Welsh Language Commissioner: Using the Welsh language - the business case](#)

*The Almond and The Seahorse* - Distributor Picnik was aware of the film's Welsh connections, including production company Mad as Birds Films, and it being Celyn Jones' directorial debut. "Welsh was a massive priority. There was Welsh influence in the film including locations / talent etc."

Materials supplied: Deck, trailer, flyers, press overview

Special events in Wales: Q&As around Wales

*Unicorns* - Distributor Signature provided comprehensive materials for exhibition.

Materials supplied: Printed posters, motion artwork, trailers, cutdown trailers, animated GIFs, Instagram drag queen makeup filter, approved marketing review quotes, social branding, review graphics, countdown videos, clips, calls to action talent videos.

Special events in Wales: Q&A was planned at Chapter but cancelled.

*Chuck Chuck Baby* - Distributor Studio Soho was aware of the film's Welsh connections, stating: "We were keen to target cinemas throughout Wales, though particularly those in the north, nearby the director's home town and the film's setting. We had a number of bookings in Wales, from both established cinemas and smaller community centres."

Materials supplied: Key artwork, social media assets including graphics and videos, trailer, pre-recorded introductions.

Special events in Wales: Director Janis Pugh did introductions and Q&As at a number of screenings and previews.

*Gaza A Story of Love and War* was self-distributed by Mike Joseph.

Materials supplied: Content for online promotion; Quad posters; links to supporting online content

Special events in Wales: All Welsh exhibitors featured a live Q&A with Director and / or relevant guests

*Starve Acre* – Distributor BFI wasn't aware of the Welsh connection, therefore wasn't focused on this as a territory for exhibition. They did not consider the film Welsh: "The only Welsh connection was the lead actress Morfydd Clark."

Materials supplied: Trailer, posters, digital assets

Special events in Wales: None

*Portraits of Dangerous Women* – Bulldog produced some assets for cinemas.

Materials supplied: Social Media, Posters, Q&A's with cast

Special events in Wales: None

*India's 1st Best Trans Model Agency* – Cosmic Cat were aware of the Welsh connection, with director Ila Mehrotra's being Wales based. The film received Welsh investment from FFCW.

Materials supplied: Trailer and EPK

Special events in Wales: None, but a recorded Q&A was made available by FHW to cinemas

*On Becoming a Guinea Fowl* – Picturehouse were aware and aimed to exploit the Welsh connection, but limited their spend due to the film being foreign-language. "Knowing

*Rungano Nyoni's Welsh heritage ensured an added focus on Wales as a core territory. However, knowing how non-English (or Welsh) language films perform in Wales we did need to remain conscious of budgets to support the film's release."*

Materials supplied: Key art, digital assets

Special events in Wales: A Watch Africa screening at Chapter Cardiff with director Rungano Nyoni in attendance

*The Walk* - Together Films produced minimal assets due to limited funding.

Materials supplied: Partnership deck, poster

Special events in Wales: None

*Satu - Year of the Rabbit* – Self-distributed by Sandwich Club Productions, they did not have enough budget to produce many assets.

Materials supplied: Digital Poster, Press kit

Special events in Wales: Director Josh Trigg appeared at a couple of Welsh previews/screenings for Q&As.

Other titles are not covered due to data not being supplied.

Overall 6 of the 16 titles were stated as having Q&As and special events in Wales to promote their films. Of note, two titles that overperformed against the average in Welsh share of box office and admissions, and featured at more Welsh sites, are included in this six. They also hosted a programme of multiple Q&As and previews at various sites and were explicit in their publicity of their Welshness. It could be inferred that their activity in Wales had a positive impact in highlighting the film overall, and its Welsh connections.

Of the remaining titles, one title held a single Welsh Q&A. It's impossible to ascribe impacts on the other titles, as comprehensive box office data was unavailable excluding them from Welsh share comparisons, however the findings here do match previous reports that show a correlation between in-Wales event activity and larger Welsh shares of box office.

## Press Coverage

All 16 films received some level of press coverage, ranging from multiple substantial articles in major publications through to coverage in more niche or local media. For many films, the only reference to their Welsh connection was as part of their inclusion in the Made in Wales database on the Film Hub Wales website. Outside of this, 8 of the 16 films received press coverage that alluded to their Welsh connections in media outside of Wales – 7 received coverage within Wales.

The films receiving wider UK/international coverage with a mention of the Welsh connection were: *Chuck Chuck Baby* with repeated reference to Pugh's heritage and the Welsh locations used, *Freud's Last Session* with Antony Hopkins' heritage noted, *Seize Them* with one mention of a Welsh location; Welsh directors were recognised for *India's 1st Best Trans*

*Model Agency*, *Gaza A Story of Love and War*; and *On Becoming a Guinea Fowl* (Little White Lies), a Welsh lead for *Starve Acre* and Welsh funder (FFCW) for *Kensuke's Kingdom*.

Titles that received coverage where the Welsh connection was noted by Welsh media only were: *Swede Caroline*, *The Almond and the Seahorse*, *Timestalker*, and *Satu - Year of the Rabbit*. Nation Cymru was the most consistent reporter across these titles, with [wales.com](http://wales.com) publishing a highlights press release supplied by Film Hub Wales. The FHW Buzz Magazine partnership also resulted in coverage of a handful of titles to culture readers in Wales.

Very little of the major coverage really looked in detail at the films' Welsh connections, and the mention of Wales was in most cases, a passing reference, whether referring to location or national identity of a director, writer, lead actor. Largely, Film Hub Wales' The Whole Story was the key place to find more contextual articles in detail about the Welshness in some of the films. For clarity and comparison against previous reports, and because it is not a mainstream media publication, The Whole Story coverage was not included in figures collating press coverage of these titles.

In a few cases, coverage was provided by Ffilm Cymru Wales and/or Welsh Government, stating Welsh connections in the films. However, as these are not mainstream media, they have also not been included.

The films which were more explicitly connected to Welshness by media were:

*Chuck Chuck Baby* – Variety conducted a full interview with Janis Pugh at Edinburgh explicitly discussing her Welsh background, her working-class upbringing in North Wales, and the film's Welsh setting; The Digital Fix ran a substantive interview where Pugh discusses growing up in Flint, the community of women in North Welsh factories, and her experience as a gay woman; and The Queer Review ran a full interview with Pugh and Louise Brealey discussing the Welsh working-class world of the film.

*Timestalker* – Nation Cymru ran a full article explicitly covering the film's Welsh connections, including Welsh filming locations, Welsh crew, and Aneurin Barnard's Welsh identity; and the Movie Waffler ran an interview with Alice Lowe explicitly discussing filming in Wales, Aneurin Barnard's Welshness, and her relationship with Wales as a filming location.

*On Becoming a Guinea Fowl* – IndieWire describes Nyoni explicitly as "*Lusaka-born, Wales-raised*" in their interview; and Little White Lies explicitly mentions her Welsh and Zambian heritage in their review.

The following films had no reference to their Welshness in media, outside of publicity fronted by Film Hub Wales: *Unicorns*, *Portraits of Dangerous Women*, *Comrade Tambo's London Recruits*, and *The Walk*.

# Release Strategy

“(Preview days are) Vastly important as we can plan when we screen and how we can market it to our audience.” – **Film Hub Wales Preview Day Attendee**

In a recent [industry survey about the Future of Welsh film](#) by FHW, 83% of exhibition respondents said previews were ‘imperative’ and ‘critical’ when deciding whether to programme a film with Welsh connections and that they often programme as a result of seeing a film first, or they will not consider screening it.

Distributors on Welsh-connected films used a mix of communication techniques to secure bookings. They largely relied on direct contact with cinemas through email and telephone conversations, with a couple of distributors using a specialist film booker. Screened previews were offered to exhibitors, alongside presentations at specific events. Distributors also relied on the film hubs to communicate to their networks.

Most distributors offered a preview or screener of the film to exhibitors prior to booking. On average, exhibitors were contacted approx. 2.5 months ahead of a release date with a view to securing bookings. The shortest notice was attributed to Studio Soho for *Chuck Chuck Baby*, with only one month to promote. The longest lead time was for *Unicorns*, with many months of advance warning, including for exhibitors attending an ICO event where Signature Entertainment promoted the film.

In terms of release timing, the major factor most distributors considered was screen availability and competition within the distribution calendar, with a couple stating it felt wise to follow festivals and awards seasons. There was also consideration of major awareness dates, including Pride for *Unicorns*, Trans Awareness Week for *India's 1st Best Trans Model Agency*, and World Refugee Day for *The Walk*. *Gaza A Story of Love and War* was also particularly topical and of immediate public interest, hence its prompt release.

Films were available on release for anywhere between six weeks and four months, with a general average of a two month release window, and a handful of titles remaining available for months afterwards. No films went straight to streaming – all had a theatrical run of some description.

Film Hub Wales ran preview days allowing Welsh exhibitors to preview Welsh-connected films in a cinema setting, with titles that would otherwise only have preview screenings in London. Running from 2022 until 2024, these featured seven of the selected films across three events with repeated opportunities to view some of them. *Chuck Chuck Baby*, *Comrade Tambo's London Recruits*, *India's 1st Best Trans Model Agency*, *The Almond and the Seahorse*, *Kensuke's Kingdom*, *On Becoming a Guinea Fowl* and *The Walk* all featured. In addition to these events, films were made available on an online preview portal hosted by Film Hub Wales, accessible to all BFI Film Audience Network members.



# International Reception & Festivals

11 of the 16 (69%) titles had an international release outside UK & Ireland, higher than 53% in 23/24 and matching exactly 69% of 24/25. This shows a return to more Welsh-connected film being exported and screened theatrically worldwide.

The following table shows how titles performed in the UK versus worldwide territories, with a note against which was the top performing country. Just a note, these figures are not comprehensive and do not include any income from non-theatrical or festival screenings.

| Film Name                    | Did it get international sales?<br>(Theatrical listed)                                                                                                                 | Worldwide<br>BO | Gross UK  | Top<br>performing<br>BO | Top<br>performi<br>ng<br>country |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------|-------------------------|----------------------------------|
| Freud's Last Session         | USA, Canada, UK, Ireland, Australia, Italy, Portugal, Israel, Greece, Middle East, India, Eastern Europe, Turkey, Latin America, Asia (excluding China, Japan, Korea). | \$4,190,596     | \$332,961 | \$768,222               | Italy                            |
| Kensuke's Kingdom            | UK, Ireland, France, USA, Canada, Italy, Belgium, Netherlands, Luxembourg, Ukraine, Poland, Brazil, Chile, Argentina, Peru, Bolivia, Ecuador, Colombia, Switzerland.   | \$3,224,642     | \$245,749 | \$2,919,215             | France                           |
| On Becoming a Guinea Fowl    | UK, Ireland, USA.                                                                                                                                                      | \$238,183       | \$70,546  | \$166,851               | USA & Canada                     |
| Starve Acre                  | UK, Ireland, USA, Canada, Germany, Switzerland, Former Yugoslav states, Poland, Middle East, Japan.                                                                    | \$160,498       | \$159,241 | \$159,241               | UK                               |
| Unicorns                     | UK, Ireland, USA, Canada, Sweden, Australia, France                                                                                                                    | \$57,982        | \$39,577  | \$39,577                | UK                               |
| Chuck Chuck Baby             | UK, Ireland, USA, Canada, Scandinavia, Baltic states, Germany, Austria, Spain.                                                                                         | \$32,972        | \$32,021  | \$32,021                | UK                               |
| The Almond and the Seahorse  | USA, UK and Ireland, Australia, Europe                                                                                                                                 | \$5,619         | \$4,369   | \$4,369                 | UK                               |
| Seize Them                   | UK and Ireland only                                                                                                                                                    |                 | \$324,493 |                         | UK only                          |
| Timestalker                  | UK, Ireland, USA (festival only), Spain (festival only).                                                                                                               |                 | \$162,871 |                         | UK only                          |
| Swede Caroline               | UK only.                                                                                                                                                               |                 | \$64,208  |                         | UK only                          |
| Portraits of Dangerous Women | UK only.                                                                                                                                                               |                 | \$10,748  |                         | UK only                          |

|                                     |                                                       |  |         |  |         |
|-------------------------------------|-------------------------------------------------------|--|---------|--|---------|
| Satu - Year of the Rabbit           | UK, Australia, New Zealand.                           |  | \$3,328 |  | UK only |
| Gaza A Story of Love and War        | UK only.                                              |  | \$3,006 |  | UK only |
| India's 1st Best Trans Model Agency | UK only.                                              |  |         |  | No data |
| The Walk                            | USA, Denmark, Switzerland (festival screenings only). |  |         |  | No data |
| Comrade Tambo's London Recruits     | UK, South Africa.                                     |  |         |  | No data |

International reach of titles is a reflection of the scale of the productions. Both *Freud's Last Session* and *Kensuke's Kingdom* were large international co-productions, with participation from multiple territories. The remaining titles had more modest numbers in terms of collaborating production companies, the reach being higher in the US for *On Becoming a Guinea Fowl*, which likely represented the scale of input from the relevant US-based production companies.

The two largest grossing titles reached more audiences in Italy and France, perhaps a reflection of population size and cinema-going cultural attitudes. Of the more domestically located titles, we can see that *Starve Acre*, *Unicorns*, *Chuck Chuck Baby* all grossed reasonably for the scale of their productions. *Seize Them* performed very well for a UK only release, with *Swede Caroline* also performing well for a low budget feature. The remaining titles struggle to perform in the UK and abroad.

We have no data for *India's 1st Best Trans Model Agency*, *The Walk* and *Comrade Tambo's London Recruits*.

The below table shows which festivals the films played at and where awards or nominations were gained.

| Film Name                   | Festival screenings                                                                                                               | Awards won                                                                                                               |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
|                             | sourced from Wikipedia, IMDB, ScreenDaily, Screen Scotland, Ffilm Cymru Wales, Deadline, Variety, BFI, Cineuropa, British Council | sourced from BIFA, BAFTA, Screen Daily, Animation Magazine, Cineuropa, Ffilm Cymru Wales, IMDb, Raindance, and Wikipedia |
| Seize Them                  | No confirmed festival screenings. Went straight to theatrical release.                                                            | No confirmed awards won.                                                                                                 |
| Swede Caroline              | Raindance Film Festival                                                                                                           | Raindance Film Festival: nominated for Best UK Feature, and won Sprit of Raindance Award                                 |
| The Almond and the Seahorse | Zurich Film Festival (world premiere, September 2022).                                                                            | No confirmed awards won.                                                                                                 |

|                                     |                                                                                                                                                                                                                                          |                                                                                                                                                                                                                           |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Freud's Last Session                | AFI Fest (world premiere, October 2023), Dinard Festival of British and Irish Film.                                                                                                                                                      | No confirmed awards won.                                                                                                                                                                                                  |
| Unicorns                            | Toronto International Film Festival / TIFF (world premiere, September 2023), Göteborg Film Festival (February 2024), Dinard Festival of British and Irish Film (2023), Sydney Film Festival (June 2024).                                 | Dinard Festival of British and Irish Film: Special Jury Prize and Audience Award for Best Feature (both 2024). BIFA 2024: Best Make-Up and Hair Design for Lisa Mustafa. Nominated for seven BIFAs in total, winning one. |
| Chuck Chuck Baby                    | Edinburgh International Film Festival (world premiere, August 2023), Cannes Marché du Film Great8 showcase (May 2023), Palm Springs International Film Festival (January 2024).                                                          | BAFTA Cymru 2024: Best Feature/TV Film, and Breakthrough Cymru Award for Janis Pugh.                                                                                                                                      |
| Gaza A Story of Love and War        | No festival screenings confirmed. Community touring release only.                                                                                                                                                                        | No confirmed awards won.                                                                                                                                                                                                  |
| Kensuke's Kingdom                   | Annecy International Animation Film Festival (European premiere, June 2023), New York International Children's Film Festival, Cannes Marché du Film (2024).                                                                              | British Animation Awards 2024: Best Feature Film, Best Original Music (Stuart Hancock), Writers Award (Frank Cottrell-Boyce). New York International Children's Film Festival (NYICFF): Grand Prize Audience Award.       |
| Starve Acre                         | BFI London Film Festival / LFF (world premiere, Main Competition, October 2023).                                                                                                                                                         | No confirmed awards won in the public record.                                                                                                                                                                             |
| Timestalker                         | SXSW (world premiere, March 2024), Locarno Film Festival (European premiere, Piazza Grande section, August 2024), Edinburgh International Film Festival (UK premiere, 2024), Fantasia International Film Festival, Montreal (July 2024). | No confirmed awards won in the public record.                                                                                                                                                                             |
| Portraits of Dangerous Women        | No confirmed festival screenings.                                                                                                                                                                                                        | No confirmed awards won.                                                                                                                                                                                                  |
| India's 1st Best Trans Model Agency | BFI Flare: London LGBTQIA+ Film Festival (UK premiere, March 2024), Borderlines Film Festival.                                                                                                                                           | No confirmed awards won in the public record.                                                                                                                                                                             |
| Comrade Tambo's London Recruits     | Premiered at 2024 Johannesburg Film Festival, followed by a community touring release.                                                                                                                                                   | Best Documentary at the 2024 Johannesburg Film Festival                                                                                                                                                                   |

|                           |                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| On Becoming a Guinea Fowl | Cannes Film Festival (world premiere, Un Certain Regard section, May 2024), Toronto International Film Festival / TIFF (September 2024), Melbourne International Film Festival (2024), Middleburg Film Festival (2024). | Cannes Film Festival 2024: Un Certain Regard Best Director Award (shared with Roberto Minervini for The Damned). Zurich Film Festival 2024: Golden Eye Award. BIFA 2024: Best Director (Rungano Nyoni), Breakthrough Performance (Susan Chardy).                                                                               |
| The Walk                  | DOC NYC (world premiere, November 2023), CPH:DOX, Copenhagen (2024), FIFDH Geneva (2024).                                                                                                                               | No confirmed awards won in the public record.                                                                                                                                                                                                                                                                                  |
| Satu - Year of the Rabbit | Raindance Film Festival (world premiere, June 2024), Nara International Film Festival, Spirit of Independence Film Festival (2024).                                                                                     | Nara International Film Festival 2024: Naomi Kawase Golden Shika Award (Grand Prix). Cambodia International Film Festival: Best Cinematography. Nominated for BIFA Best Debut Director, BIFA Raindance Maverick Award, Raindance Discovery Award for Best Debut Feature, Best Debut Director, and Best Performance in a Debut. |

Six films played at major international festivals, a growth on the two that achieved major festival access in the previous year. *Unicorns* had its world premiere at the Toronto International Film Festival (TIFF). *Chuck Chuck Baby* appeared in the Cannes Marché du Film Great Eight showcase in May 2023. *Starve Acre* appeared at the BFI London Film Festival as a world premiere in the main competition in 2023. *Timestalker* had its world premiere in March 2024 at SXSW. *On Becoming a Guinea Fowl* premiered and won the Un Certain Regard Best Director Award, shared with Roberto Minervini for *The Damned*, at the Cannes Film Festival 2024. *Kensuke's Kingdom* featured at the Cannes Marché du Film 2024.

Niche festivals also played their part: *Kensuke's Kingdom* had its European premiere at the Annecy International Animation Film Festival in 2023; *India's 1st Best Trans Model Agency* premiered at BFI Flare, London's LGBTQIA+ Film Festival, in March 2024; *The Walk* featured at DOC NYC 2023 and CPH:DOX in Copenhagen 2024, both specialist documentary film festivals; *Satu - Year of the Rabbit* had its world premiere and *Swede Caroline* presented at the Raindance Film Festival; and *Comrade Tambo's London Recruits* featured at Joburg International Film Festival.

Representation was also reasonable among seven titles, with awards wins and nominations.

- *Unicorns* was nominated for seven BIFAs, winning one for Best Make-Up and Hair Design.
- *Chuck Chuck Baby* won Best Feature/TV Film and the Breakthrough Cymru Award for Janis Pugh at the BAFTA Cymru Awards 2024.

- *Kensuke's Kingdom* won the Grand Prize Audience Award at the New York International Children's Film Festival.
- *On Becoming a Guinea Fowl* won the Un Certain Regard Best Director Award, shared with Roberto Minervini for *The Damned*, at Cannes 2024. It also won the Golden Eye Award at the Zurich Film Festival, and Best Director and Breakthrough Performance at the BIFAs 2024.
- *Satu - Year of the Rabbit* was also nominated at the BIFAs for Best Debut Director and the Raindance Maverick Award, and won the Golden Shika Award at the Nara International Film Festival.
- *Swede Caroline* won a Spirit of Raindance Award.
- *Comrade Tambo's London Recruits* won the Best Documentary at the 2024 Johannesburg International Film Festival.

Only three titles had no record of festival appearances.

Compared with previous years, festival representation increased overall across both the major and more niche/smaller film festivals. Despite figures for some being reasonably comparable with previous years – 6% at SXSW (compared with 0% in 23/24, 8% in 22/23), 12.5% at TIFF (compared with 13% in 23/24, 14% in 22/23), 12.5% at LFF (compared with 6% in 23/24, 30% in 22/23) – 18.7% of titles did play at Cannes, where none of the films in the previous year did, showing a move towards visibility at this major festival. No titles this year played at Sundance, matching last year's figures.

Awards don't always translate to audience admissions, however, in terms of building a profile for Welsh-connected film, it's encouraging to see a bolstered presence for these titles and recognition of Welsh talent.

## Budgets and Funding

Three films budgeted under £5,000 in distribution spend, two budgeted up to £15,000. Three budgeted up to £50,000, while one campaign ran on £65,000.

Three distributors claimed to spend approximately what would be expected for a comparable campaign. Three further titles were all budgeted with less spend than would typically be expected. One distributor committed to an above-average spend where they felt the title had more commercial potential.

One distributor stated they would like to have spent more in marketing but were weighing up the risk factors against the ROI potentials for the two titles. They also aligned their budget to the amount of screens they had booked. Another similarly responded to the impressions of what Box Office would take for their title, revising down their spend.

Another smaller distributor was unsuccessful with their BFI bid for distribution support, so ended up shrinking their budget to lower than anticipated. Another focused on non-theatrical – partnerships and impact.

As none of the top grossing titles in the selection completed the survey/contributed budget information, we're not able to get a sense of ROI against their distribution campaigns. However, of the titles where we do have enough data to extrapolate an estimate, it's clear the margins for profit are very tight on the indie and lower budget titles in the selection. Three titles appear to break even when comparing their UK & Ireland gross box office income against the cost of their distribution campaign. One project appears to have lost a huge amount with investment far outweighing income. Two titles made a modest profit. One title spent around 53% of its box office income on its distribution campaign.

*Chuck Chuck Baby* was one of eight films selected by the BFI and British Council for the Great8 showcase at the 2023 Cannes Marché, receiving support to reach sales agents for distribution. *The Almond and the Seahorse*, *Kensuke's Kingdom*, and *Starve Acre* all received BFI International Film Sales support; *Freud's Last Session* received International P&A funding; and *Unicorns*, *Chuck Chuck Baby*, *Starve Acre* and *Timestalker* all received International festival launch support.

*Unicorns*, *Chuck Chuck Baby*, *Kensuke's Kingdom* and *India's 1st Best Trans Model Agency* received impact funding from Ffilm Cymru Wales to support distribution and exhibition efforts. *Timestalker* received a BFI Audience Project award to support UK distribution. This is an increase on the previous year, where no films received UK distribution funding support.

Half the distributors who completed the survey stated the film performed as well theatrically as they anticipated, half did not. Several reasons were supplied around the perceived underperformance of titles such as capacity in teams, need for wider support and awareness, and the need for more funding:

- "Broader support and awareness would have helped - it was considered too small for some players meaning audiences struggled to find it in cinemas."
- "Disappointing result - limited screens and limited awareness due to minimal spend."
- "Every venue taking the film reported better than expected box office for that slot. The major constraint was in-house capacity to pitch (and follow-up) to potential venues."
- "This was a difficult release that, had greater funding been available, we might have made a stronger case to programmers to book the film. In the end we only managed 15 cinemas and a lower turnout compared to previous titles."

Six of the 16 titles received production funding from FFCW – *The Almond and the Seahorse*, *Unicorns*, *Chuck Chuck Baby*, *Kensuke's Kingdom*, *Timestalker* and *India's 1st Best Trans Model Agency*. *Freud's Last Session*, *Chuck Chuck Baby* and *Timestalker* also received BFI production income. *Chuck Chuck Baby* was also funded by BBC Film, who also funded *Starve Acre*.

*The Almond and the Seahorse*, *Kensuke's Kingdom*, *Timestalker* were also funded by Creative Wales (or Welsh Government, before Creative Wales was founded). Creative Wales also assisted *Chuck Chuck Baby* and *Seize Them!* through location support.

Overall, titles in this selection were in receipt of more support than in the previous year, with multiple titles receiving funding, where only one or two had in the 23/24 period.

## Funder insights

*Ffilm Cymru was asked for industry context during the period to gain insights into how the Welsh connected titles were received as well as any domestic or international factors that may have impacted their reception.*

CEO of Ffilm Cymru Wales Lee Walters shared the following:

### **Reflections on success:**

Our funded titles performed positively in Wales, with local audiences responding strongly to works with clear Welsh creative or geographic connections. *Chuck Chuck Baby* and *The Almond and the Seahorse* achieved meaningful visibility in Wales, generating local press and community engagement. *Timestalker* and *Unicorns* gained festival exposure and modest national box office returns. While we did not support *On Becoming a Guinea Fowl*, having previously supported Rungano Nyoni's debut feature *I Am Not a Witch*, we publicised the film and were pleased that it secured international festival acclaim, strengthening Wales' profile on the global stage.

Overall, our support tends to translate to enhanced regional awareness and cultural impact within Wales, while wider commercial performance depends largely on distributors and market conditions.

### **2024/25 contextual factors:**

Key influences on releases during 2024/25 included festival timing, as several titles premiered at major international festivals, affecting their domestic release calendars; market sensitivity, as geopolitically themed titles such as *Gaza A Story of Love and War* required nuanced release approaches; and changes to the funding landscape, as the introduction of the Creative Wales production fund, delivered via Ffilm Cymru, created new routes for Welsh-backed production, shaping project pipelines.

### **Marketing and distribution support:**

Ffilm Cymru provided additional impact funding to selected titles, including *Unicorns*, *Chuck Chuck Baby*, and *Kensuke's Kingdom*.

### **Promotion of Welsh connections:**

Where significant Welsh talent, locations or investment were present, we actively highlighted those links through socials, forming part of our remit to promote Welsh film culture and

visibility. Where connections were minimal or indirect, we judged that emphasis might not add audience value.

#### **Data on Welsh talent, EDI and investment:**

We are not able to share these stats for data protection reasons.

#### **Developments in 2024/25 distribution funding:**

The BFI National Lottery continued to underpin UK distribution and audience development schemes. The Creative Wales production fund, administered by Ffilm Cymru from 2024/25, improved access to Welsh financing for production, indirectly supporting later distribution outcomes. No new Wales-specific tax reliefs for distribution were introduced during the period.

#### **Future opportunities to strengthen Welsh film distribution:**

We see scope to introduce a Welsh release support fund to co-finance marketing and touring activity, and to expand Q&A and educational touring for Welsh-made titles.

*The BFI also shared insights. Director of the Filmmaking Fund, Mia Bays responded, with perspectives as a production funder.*

#### **Reflections on success of BFI supported films, within, and outside Wales.**

*Kensuke's Kingdom*, distributed by Modern, was the best performing of the titles at £187k, with *Starve Acre* and *Timestalker* doing well at £130k each. *Chuck Chuck Baby* was the most explicitly Welsh title, and unfortunately, was disappointing at £27k, though its producer was pleased with the Welsh impact in terms of attendance and interest at Q&A events.

*Timestalker* was the most successful release included on the ESCAPES programme, a nationwide initiative offering free tickets to independent film. The fact that all these titles received distribution is a major achievement, aside from their box office performance.

#### **24/25 context that affected their release.**

More P&A (Prints & Advertising) support would have had an impact. The UK Global Screen Fund (UKGSF) includes a P&A fund of newly, non-recuperable grants which could help future titles get visibility, accessible outside of audiences support. As of 2025, a UK theatrical release could be included in a grouping of (at least 3 other) international territories that could apply for support. Smaller British titles really need a confident distributor, the success of which can be seen in the campaigns of films like *The Ballad of Wallis Island* and *I Swear*. *Kensuke's Kingdom* benefited from opening at 165 screens, a good number of sites in comparison with other titles.

#### **Highlighting Welsh connections.**



*Chuck Chuck Baby* was the only overtly Welsh title where the Welsh connection felt clear. BFI would usually follow the lead of distributors in terms of highlighting and promotion.

### **Supporting Welsh connected film distribution in future.**

GSF's P&A fund now being available to UK titles could have a positive impact, for films that have rights in multiple territories, distributors associated.

A challenge for Welsh film generally is that much of the crew and cast opportunities are broadly TV-based. This creates an issue as a training ground, making that leap from television to film production and can create televisual results, and not enough cinematic flourish. It feels there's less capacity for creating cinematic work, and there needs to be a method for bridging that gap. It's visible in the ideas that get forwarded, and the projects that are developed, there's a lack of industrial sense checking, access to distributors, sales agents, and understanding audience experiences. FFCW are trying to develop pipelines but hugely disadvantaged by Wales having so much less money - it's a really different picture to Scotland who get decent investment.

Perhaps a focus on Welsh acting and language, a focused, long-term intervention to build practice and skills, would give results.

## **Support from Film Hub Wales**

FHW support the release of 'Made in Wales' films in a number of ways, starting by contacting the distributors of all titles that they identify as having Welsh connections. Each Welsh film is recorded in their [online catalogue](#) to make it easier for programmers to find and book. FHW also hosts the film in an online preview room where provided; a password protected area of their website that contains screeners of upcoming films for UK BFI FAN members to consider for 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. FHW members (exhibitors) can also apply for funding from FHW 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 long-term (even when FHW is not directly promoting or mentioning it).

For select titles that meet key criteria, such as strong inclusion principles, Welsh hook and audience potential, this strategy goes deeper. From the moment a film receives a distributor, FHW work alongside them to develop their distribution strategy in Wales. To begin, FHW consult with them to explain the challenges facing Welsh cinemas, laying out solutions and potential support strategy. The aim is to encourage Welsh bookings and to highlight the film's Welsh connection in the marketing strategy. Made in Wales has a small budget allocated for editorial commissions, press releases, and to host assets via their social

platforms (Instagram, Facebook, Letterboxd) and FHW web page The Whole Story. It has no funding to offer towards distribution campaigns or for filmmaking.

The Made in Wales Project Manager which is funded by Creative Wales for two days per week, also works to create tailored assets such as interviews, articles, reviews and curated short films packages. For example, a video intro and Q&A video and audio podcast with director Janis Pugh, and support pack were created for *Chuck Chuck Baby*, to assist exhibitors in their audience development. An article exploring the real stories that inspired the film was published in Welsh culture magazine, Buzz Mag as a way to raise central awareness of the film's Welsh connections.

FHW's strategy aims 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. One programmer said of the event: *"very important. I won't screen a film without seeing it first."*

### **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 license fees. To resolve this, they set up regular meet-ups for Welsh exhibitors to chat directly to distributors about Welsh films. This enables exhibitors to get more involved in a Welsh film's marketing / release strategy, there is clear and fair communication around fees / minimum guarantees for everyone, and distributors meet 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 FHW 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 FHW 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.

FHW has supported the 16 'Made in Wales' titles in this report in various ways.

All 16 films were placed in the Welsh film catalogue, and supported via social media and/or email newsletters.

9 films (56%) were made available to exhibitors in the online Screening Room. Seven titles also featured across three in-person preview events, three at the 2024 Welsh Film Preview Day.

The level of support that Film Hub Wales can offer to titles is dependent on how much time they have to work with a film, and how willing the distributor or filmmakers are to reach Welsh audiences. Online screeners are very beneficial for exhibitors based in Wales, via Film Hub Wales' preview room or otherwise, as many are unable to attend in-person previews in London.

| Film Name                           | Who established contact? | Period between contact & release | Newsletter, website, direct mailings | Socials | Preview | Support pack | Video content | Podcast interview | Editorial |
|-------------------------------------|--------------------------|----------------------------------|--------------------------------------|---------|---------|--------------|---------------|-------------------|-----------|
| Seize Them                          | Hub                      | 2 weeks                          | x                                    | x       |         |              |               |                   |           |
| Swede Caroline                      | Them                     | 10 days                          | x                                    | x       | x       |              |               |                   |           |
| The Almond and the Seahorse         | Hub                      | 1 year                           | x                                    | x       | x       | x            | x             | x                 | x         |
| Freud's Last Session                | Hub - No one replied     | Weeks                            | x                                    | x       |         |              | x             |                   |           |
| Unicorns                            | Hub                      | 15 months                        | x                                    | x       | x       | x            | x             | x                 | x         |
| Chuck Chuck Baby                    | Hub                      | 1 year                           | x                                    | x       | x       | x            | x             | x                 | x         |
| Gaza A Story of Love and War        | Them                     | 1 month                          | x                                    | x       | x       |              |               |                   |           |
| Kensuke's Kingdom                   | Hub                      | 1 month                          | x                                    | x       | x       | x            | x             | x                 | x         |
| Starve Acre                         | Hub                      | 2 months                         | x                                    | x       | x       | x            | x             |                   |           |
| Timestalker                         | Hub                      | 3 months                         | x                                    | x       |         | x            | x             |                   |           |
| Portraits of Dangerous Women        | Them                     | 1 month                          | x                                    | x       | x       |              |               |                   |           |
| India's 1st Best Trans Model Agency | Hub                      | 5 months                         | x                                    | x       | x       | x            | x             | x                 | x         |
| Comrade Tambo's London Recruits     | Hub                      | 6 months                         | x                                    | x       | x       | x            | x             | x                 | x         |
| On Becoming a Guinea Fowl           | Hub                      | 5 months                         | x                                    | x       | x       | x            | x             | x                 | x         |
| The Walk                            | Them                     | 2 months                         | x                                    | x       | x       |              |               |                   |           |
| Satu - Year of the Rabbit           | Them                     | 2 months                         | x                                    | x       | x       | x            | x             | x                 |           |

The distributors surveyed were also asked about their thoughts on the support that FHW offered them with their release, clarifying that FHW does not offer funding for titles, but can support with staff time and resource. Their responses are below.

Overall, seven responding distributors felt supported by FHW and that input from the team had made a difference to their campaigns. One distributor stated they felt there was no impact by FHW, despite the team having created assets to support the release, however the survey respondent also felt unqualified to respond to what wider support could be useful. One distributor raised that more staff time to help pitch to exhibitors would have been welcome. A further suggestion included offering services around Welsh translation. Several distributors noted that FHW communications and brokering relationships between exhibitors and distributors had been beneficial for their titles. Two respondents did not answer these questions in the survey.

| Film Name                    | Do you think our support helped the release?                                                                                                                                                                                                                                                                                                    | What wider support do you think is needed in Wales to help your films get seen?                                                                                                                                                                   |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Swede Caroline               | Staff time in helping further pitch the IP to exhibition perhaps and in increasing PR in territory                                                                                                                                                                                                                                              | Funded support for exhibitors to release films and keep them in cinemas for those that have welsh impact/involvement                                                                                                                              |
| The Almond and the Seahorse  | Yes, in terms of driving awareness to Welsh exhibition and in supporting the premiere event. That was incredibly positive and supportive. The team were fantastic. Always more staff engagement in helping build awareness of the film further would be immense.                                                                                | Engaging exhibition even further to ensure they support films - part funded screenings.                                                                                                                                                           |
| Chuck Chuck Baby             | Staff were extremely helpful putting us in contact with Welsh exhibitors and suggested possible special events and connections in Wales. Some kind of in-house translation service for key assets into Welsh could be extremely helpful in making sure that all marketing assets distributed in Wales are also available in the Welsh language. |                                                                                                                                                                                                                                                   |
| Gaza A Story of Love and War | Your regular circulation list was picked up by a few Welsh venues, who approached us for screenings, which were highly successful, both in box office and audience response. Sadly, the majority of venues did not initiate response, and our in-house capacity to                                                                              | The most effective motivator for exhibitors was a very positive review in The Guardian prior to release. This assisted recognition in England, Scotland and Ireland when we approached venues. Because The Guardian has low circulation in Wales, |

|                                     |                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                       |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     | pitch and promote was a serious limiting factor                                                                                                                                                 | the positive effect was absent. This is a reflection on the dire state of Welsh news and current affairs media, rather than on the cinema industry here.                                                                                                                              |
| Starve Acre                         | No                                                                                                                                                                                              | Sorry I don't feel qualified to comment                                                                                                                                                                                                                                               |
| India's 1st Best Trans Model Agency | The support made a very limited release possible and we were able to connect with a small but very engaged audience through a concerted outreach campaign targeting Pride events across the UK. | It would be good to have regular updates on all programmer contacts in Wales.                                                                                                                                                                                                         |
| On Becoming a Guinea Fowl           | Yes, any additional support to communicate with local exhibitors is beneficial, especially on titles where budgets are limited.                                                                 | Similarly to elsewhere, support for local cinemas to engage with audiences. Support for distributors on certain theatrical releases who do not have large-scale budgets to grow awareness to compete with blockbusters/connect locally at a grassroots level due to staff capacities. |

As with previous reports, it's complex to measure the impact of FHW's work - the source of bookings (whether FHW comms or distributors' direct outreach) isn't tracked and reported. In the case of *Starve Acre* where social media video edits were created by FHW to support the release, and attained reasonable views on Made in Wales channels, it's likely that the impacts on uptake by exhibitors was not visible to the distributor.

In terms of wider support, funding was the main ask, to subsidise screening costs. Distributors also mentioned the need for more film discourse in Welsh media, regular programmer contact updates, and grassroots impact support for lower budget works.

## Diversity & Representation

The 16 films have been analysed in terms of gender and ethnic diversity, with comparisons made to the findings in the previous 23/24 report. 118 people were identified as key talent on the 16 films (listed credits as producer, director, writer or lead actor).

This table shows some diversity data that was canvassed across producers, directors, writers and lead actors of the 16 films in this period. The previous categories, measuring gender and ethnicity have been included with reference to measurements from previous reports. Additionally, a further three categories have been added to look further into diversity raised through publicly accessible data about the various filmmakers and cast members or contributors.

|  |  | Director | Writer | Lead actor/s | Producer |
|--|--|----------|--------|--------------|----------|
|  |  |          |        |              |          |

|                                |       |     |     |     |     |
|--------------------------------|-------|-----|-----|-----|-----|
| Female including trans women   | 24/25 | 30% | 25% | 47% | 35% |
|                                | 23/24 | 18% | 24% | 45% | 24% |
|                                | 22/23 | 31% | 40% | 60% | 36% |
|                                |       |     |     |     |     |
| Non-binary                     | 24/25 | 0%  | 0%  | 0%  | 0%  |
|                                | 23/24 | 0%  | 0%  | 0%  | 0%  |
|                                | 22/23 | 0%  | 0%  | 5%  | 0%  |
|                                |       |     |     |     |     |
| Global Majority                | 24/25 | 35% | 30% | 45% | 10% |
|                                | 23/24 | 0%  | 0%  | 20% | 8%  |
|                                | 22/23 | 15% | 10% | 25% | 15% |
|                                |       |     |     |     |     |
| LGBTQIA+                       | 24/25 | 10% | 10% | 9%  | 0%  |
|                                |       |     |     |     |     |
| Deaf, disabled, neurodivergent | 24/25 | 0%  | 5%  | 4%  | 0%  |
|                                |       |     |     |     |     |
| Working class                  | 24/25 | 5%  | 5%  | 2%  | 0%  |

### **Methodology**

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.

Problematically, assumptions about gender have been based on information available publicly through IMDb and other viable sources. It is therefore likely that there is incorrect data for someone identifying as non-binary, who may have been mis-gendered using names as gender-identifiers.<sup>10</sup>

Otherwise, across the 16 films, the diversity data (excluding gender) was gathered from publicly stated characteristics only – information that the individuals themselves have chosen to make public through interviews, social media, autobiographies, or other public statements. No assumptions were made for these other four characteristics (ethnicity, LGBTQIA+, Deaf/disabled/neurodivergent, class status) that had not been publicly stated.

### **Film Production Diversity Globally**

<sup>10</sup> The gathering of gender data is problematic, as it is not being submitted by production teams/individuals who can self-identify but relies on assumption based on names. As this project is underfunded, FHW is unable to resource comprehensive R&D to source this data effectively and is hopeful that greater future investment can result in more ethical and robust diversity monitoring.

Behind the camera, only 21.7% of all directors, writers and producers in 2024 were women, calculating to a gender ratio of 3.2 males to every one female. In terms of directors specifically, only 14.3% were women and 85.7% were men.<sup>11</sup>

Dr. Martha Lauzen, Founder of the Center for the Study of Women in Television and Film at San Diego State University, whose Celluloid Ceiling study has monitored this for 27 years: "In 2024, women accounted for 20% of editors, the same percentage as in 1998. No sustained forward movement in over a quarter century."<sup>12</sup>

Below the line and on screen, the number of films written by a woman fell to 22.1% in 2024, down almost five percentage points since the high in 2022. A breakdown of all writers and co-writers in 2024 found that 91.5% were white, and 149 out of the total 189 film writers were white men.<sup>13</sup>

### **Closer to Home**

These figures are primarily drawn from US-focused studies, however UK reports consistently show similar patterns – women directing approximately 20-24% of UK theatrical features.

Our small sample of Welsh-connected film correlates with this trend – though there is a slight improvement in gender representation on the drop in the previous year, it doesn't exceed the figures of the year before, 22/23.

However, there is a heartening improvement in ethnic diversity across director, writer and lead actor roles in our Made in Wales film sample, although this drops at producers. Overall, we see a wider selection of global stories and broader representation across the Welsh-connected titles.

In comparison to the wider UK picture, this sets a higher bar. In Creative UK's report, Leadership Diversity in the Creative & Cultural Industries, "*Just 12% of executive or corporate roles in film & TV are held by ethnic minorities, alongside just 9% of senior-level roles.*"

Additionally, "*6.5% of UK based film & TV directors identify as disabled,*" a low figure in light of the UK population figures on disability. This figure is still an increase on disability representation in our sample of Welsh connected titles.

The report also states, "*Across the wider economy, working class people make up 35% of the workforce. Yet only 17% of UK based film & TV directors are from working class backgrounds.*" With barely any working class representation in our sample, the need for committed diversification work within Welsh film is apparent.

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<sup>11</sup> Inequality in 1,800 Popular Films - USC Annenberg Inclusion Initiative <https://assets.uscannenberg.org/docs/aii-2025-inequality-popular-films-full-report.pdf?ref=thefilmmaven.com>

<sup>12</sup> New York Women in Film and Television - Living Archive: The Celluloid Ceiling <https://www.nywift.org/wp-content/uploads/2025/08/Living-Archive-27-Years.pdf>

<sup>13</sup> UCLA Hollywood Diversity Report 2025 <https://socialsciences.ucla.edu/wp-content/uploads/2025/06/UCLA-Hollywood-Diversity-Report-2025-Streaming-Film-6-18-2025.pdf>

There is much to be done around increasing Deaf, disabled, neurodivergent, and working class representation across all above and below the line roles. A baseline has been set for future reports to respond to.

Of course this report does not account for a more intersectional analysis. There are some cast and crew members of these films who identify as both female and Global Majority, which isn't represented here. Additionally, this report is limited in the assumptions it makes around gender, and the reliance on publicly accessible self-identified data online. To gain a deeper picture, diversity monitoring data direct from production companies requires assessment.

In terms of accessibility of the titles to audiences, eight of the nine distributors who answered the question about providing accessible formats, stated they offered access materials (*Swede Caroline*, *The Almond and the Seahorse*, *Chuck Chuck Baby*, *Gaza A Story of Love and War*, *Starve Acre*, *India's 1st Best Trans Model Agency*, *The Walk* and *Satu - Year of the Rabbit*). Two respondents did not answer this question.

These specific materials have not been outlined, but some detail can be found on the FDA's website, where titles are often listed before release with access versions noted. *Chuck Chuck Baby*, *Starve Acre*, and *India's 1st Best Trans Model Agency* were all made available with descriptive subtitles and audio description listed in this way.

## Case studies

*Studio Soho released Chuck Chuck Baby. Here, they discuss the impact of Made in Wales and their experience releasing this Welsh-connected film in Wales, with the support of FHW.*

**You received funding to support the distribution of Chuck Chuck Baby from Ffilm Cymru - what did the funding enable you to do in terms of your release strategy?**

The Ffilm Cymru funding enabled us to send the film's director and leads to cinemas around Wales and the United Kingdom to participate in Q&As after screenings of the film. The funding enabled us to have more of these Q&As, particularly at smaller sites in Wales and the North-East of England, which experienced larger audience turnouts as a result. We were also able to divert a greater focus on targeting Welsh cinemas, allowing us to expand our release across Wales to 19 Welsh cinemas. Additionally, the funding helped us to make the film's premiere more impactful, securing more press coverage to promote the film across the UK.

**Could you explain how Film Hub Wales supported you?**



Film Hub Wales did a fantastic job of connecting us with Welsh exhibitors and encouraging them to book the film, particularly those operating on a smaller, community-focused scale, who we might not have found otherwise.

**Were there any Welsh cinemas in your top 10 sites for the film across the whole UK & Ireland release (in terms of box office gross)?**

Yes – The Chapter cinema in Cardiff was one of our top 10 sites.

**Do you think the Welsh marketing assets helped to engage Welsh audiences, and was there a noticeable box office uplift in Wales?**

Absolutely – we noticed a far higher proportion of box office income coming from Welsh sites for this release compared to other releases of ours. Alongside this, we noticed a greater amount of uptake of our marketing from Welsh cinemas, who were very active in marketing the release (which isn't always the case!)

*As part of supporting Joshua Trigg's debut feature - Satu-Year of the Rabbit, FHW ran a campaign on social media, previewed the film and promoted bookings directly with exhibitors, alongside producing resources through the Whole Story. Here, Joshua explained his process for the self-distribution of the film.*

**How did the film come about and why did you decide to self-distribute it?**

The film was 90% self funded over 5 years by myself (Josh) through commercial work and loans. It took some time for Satu to gather steam, but after a successful festival run (and after self distributing to cinemas) we did get distribution in the UK and globally. I believe that I was the only person that wanted to push this film to that distance, so personally ringing and emailing all the independent cinemas in the UK ensured we got the film out there as much as possible. It also helped secure the later VOD distribution.

**How did you fund the distribution of the film?**

Just splitting with cinemas and my personal money.

**Could you speak a bit on the ways that Film Hub Wales did support you? In what ways do you think FHW could better support distributors/filmmakers?**

I think you are all doing a cracking job. Just keep supporting the indies!

**Did you do any Q&As or special event screenings? How many of those were in Wales?**

Yes, we held about 60 Q&As in total globally (from festival to cinema release). I toured the film around Wales and probably had about 6/7 in total.

# Conclusion

16 Made in Wales titles were tracked (up from 15 in 23/24), and all 16 secured a theatrical release, versus only nine of 15 the year before, showing a return to the patterns seen in 21/22 and 22/23. Welsh box office share sits at 4%, an improvement on 23/24's 3.27% but still below the 5.2% Welsh population share (2021 Census) and below several earlier years (4.9% in 22/23, 13% in 21/22, 11% in 20/21) suggesting the market may be normalising at a lower level rather than recovering to pre-2022 levels. It may also link to the types of films released and their release strategies.

Seemingly, films that leant into their Welsh identity performed better in Wales. Two titles with explicit Welsh talent/location marketing and multiple Q&As, significantly outperformed the sample on Welsh box office share and number of sites. Only eight of 16 films had their Welsh connection mentioned in UK/international press, seven in Welsh media, and coverage was mostly a single reference. FHW's own channels (The Whole Story, Buzz Mag partnership) did most of the heavy lifting.

No Welsh language marketing materials were produced for any title, continuing last year's pattern, despite 29.2% of the population being Welsh speakers and clear evidence (Welsh Language Commissioner/Citizens Advice data) that Welsh-language service increases engagement.

69% of titles had an international release (against 53% in 23/24), six films played major festivals (vs two last year), and 18.7% appeared at Cannes (0% last year). Awards recognition (seven titles) was also up. This occurred against an improved funding landscape, with more titles in receipt of FFCW production and impact funding, BFI P&A/festival support and Creative Wales investment than in 23/24 (previously only one or two titles were funded).

Financially, the situation remained extremely tight for indie/low-budget titles – most of the sample. Several broke even at best, one made a significant loss, and one distributor spent 53% of box office income on its film's campaign. Distributors cite capacity, awareness and funding gaps as the main constraints, not lack of audience interest.

# Recommendations

## A. Visibility of Welsh Connections in Media

- Share data on the impact of highlighting Welsh connections (bookings, increased admissions) with funders, filmmakers and distributors, to make the commercial case for doing so.

- Request Welsh references/boilerplate text in press releases and social copy as standard, from production companies and distributors, at point of first contact.
- Encourage funders to ring-fence a small proportion of production/distribution awards specifically for promoting Welsh connections as a condition of support.
- With further investment, MIW's editorial/press function (The Whole Story, Buzz Mag partnership) could be scaled into a more proactive press office role, pitching stories to national/UK press ahead of release.

## **B. Welsh Language Engagement**

- Provide clear, simple guidance to distributors on what "Welsh language marketing materials" can realistically mean at low cost (e.g. subtitled trailer cut-downs, bilingual social copy).
- Address the specific concerns raised by distributors (not wanting to imply Welsh subtitles exist in the film itself, fear of "not being Welsh enough") with a simple decision framework for when/how to use Welsh language marketing.
- Make the audience-development case part of the standard MIW pitch to distributors.
- A commissioned Welsh translation service for key marketing assets could become a funded MIW offer if resourced.

## **C. Release Strategy & Previews**

- Continue and, if possible, expand Welsh Film Preview Days and the online Screening Room, as they are highly valued by exhibitors ("I won't screen a film without seeing it first") and directly correlate with bookings.
- Investigate ways to bring more preview opportunities to Wales itself, reducing reliance on London-based previews that Welsh-based exhibitors struggle to attend.
- Encourage earlier engagement between distributors and FHW, which would result in stronger Welsh outcomes.
- With more resource, MIW could run additional regional preview events (e.g. North/South Wales) and formalise minimum lead-time expectations with distributors.

## **D. International Reception & Festivals**

- Where a title secures major festival play or awards recognition, ensure this is fed back quickly into domestic marketing and press materials.
- Support smaller/niche festival routes (e.g. BFI Flare, Raindance) as valid and valuable pathways for Welsh-connected titles, not just the "major five."

- With funding, FFCW and Creative Wales could offer financial support to help Welsh-connected filmmakers attend festivals and Q&As, converting festival buzz into Welsh press and exhibitor interest sooner.

## **E. Budgets & Distribution Funding**

- Advocate for a dedicated Welsh distribution/marketing fund to sit alongside existing production funding routes.
- Encourage funders to consider P&A support even for very low-budget/self-distributed titles, where a small grant could meaningfully change results (several titles operated on distribution budgets under £5,000).
- Promote awareness of the UK Global Screen Fund's P&A strand (available where a title has rights across multiple territories) as a potential source for Welsh-connected titles with international sales.
- If funded, MIW could administer a small, ring-fenced "Welsh release support fund" to co-finance marketing/touring activity for selected titles, filling the gap MIW currently cannot, as it holds no distribution funding itself.

## **F. Support from Film Hub Wales (capacity & reach)**

- Continue to be transparent with distributors from first contact about what FHW can and cannot offer (staff time and reach, not funding) to manage expectations .
- Track booking sources more methodically (FHW-originated or distributor-direct) to better evidence FHW's impact in future reports.
- Expand exhibitor meet-ups and relationship development, which distributors consistently rate as valuable, especially for first-time or self-distributing filmmakers.
- Additional staff capacity (raised by multiple distributors as the main constraint) would allow MIW to move from a reactive, signpost model to more hands-on campaign support for a wider number of titles.

## **G. Diversity & Representation**

- Formalise the new baseline data (LGBTQIA+, Deaf/disabled/neurodivergent, working-class) established this year so it can be tracked consistently going forward.
- Work with production funders (FFCW, BFI, Creative Wales) to explore how self-identified diversity monitoring data (rather than externally inferred data) could be shared with MIW, addressing the current data protection barrier.
- Target working-class and disability representation specifically, given these lag furthest behind both the Welsh sample's other diversity metrics and the UK-wide Creative UK benchmarks.

- With investment, MIW could commission proper, consent-based diversity monitoring across the sample (rather than relying on publicly available data), giving funders a much stronger evidence base for future intervention.

## **H. Accessibility**

- Encourage all distributors, not just higher-budget titles, to budget for basic access provisions (subtitles, audio description) from the outset. Accessibility appears to strongly correlate with budget size.
- MIW could maintain and publicise a simple low-cost access checklist for smaller/self-distributing filmmakers, in partnership with the FDA's existing access listings, or Sidecard, the film materials access database founded by Film Hub Wales with Matchbox Cinesub.

## **Further information**

- [Website](#)
- [Film catalogue](#)
- [Instagram](#)
- [Facebook](#)
- [TikTok](#)
- [Podcast](#)
- [YouTube](#)
- [Letterboxd](#)

*MIW is made possible thanks to funding from Creative Wales and the BFI Film Audience Network (FAN), awarding funds from the National Lottery. BFI FAN offers support to exhibitors across the whole of the UK, to boost cultural programming and engage diverse audiences. In Wales, activity is led by Film Hub Wales, managed by Chapter.*