Finding Welsh Film Data: 23-24

Following on from our Welsh film data research, running since 2019, we commissioned Delphine Lievens and Toki Allison to examine 15 films releasing between April 2023 - March 2024, with the aim of analysing how they performed in cinemas, and how our support contributed to their release. 23/24 was an unusual year, with many films pushed back due to strikes, including key titles that Made in Wales supported.

FILM HUB WALES
CANOLFAN FFILM CYMRU

Our Methodology

15* **feature films** (from a total of 15 known titles)

April 2023 - March 2024 release dates

Range of budgets and release strategies

Distributor, producer, financier and personnel survey

Comscore data

Desk research

Made in Wales' films include:

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

Image: The Magic Flute © Sola Media

Films











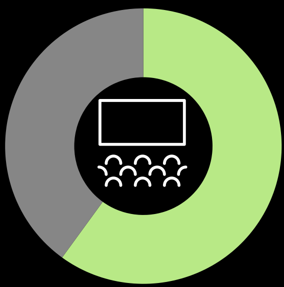




Images from top left:
A Million Days (© Signature Entertainment), ***A Year in a Field*** (© Anti-Worlds Releasing), ***And Then Come the Nightjars*** (© Munro Film Services), ***Bolan's Shoes*** (*© Buffalo Dragon Films*), ***Daliland*** (© Bankside Films, ***LOLA*** (© Signature Entertainment), ***My Happy Ending*** (© Republic Film Distribution), ***Older Gods*** (© Wagyu Films), ***Our Son*** (© Vertical Entertainment), ***The Canterville Ghost*** (© Signature Entertainment), ***The Creator*** (© 20th Century Studios), ***The Eternal Daughter*** (© A24), ***The Magic Flute*** (© Sola Media) ***The Martin Decker Show*** (*© Kevin Jones*) ***Twin Town*** (© fFatti fFilms / Music Film Network)

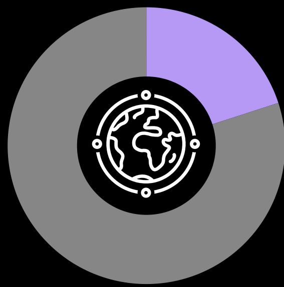
Our Findings

Distribution



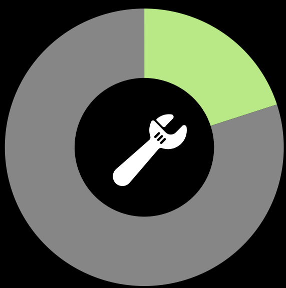
60%

10/15 theatrically distributed in the UK and Ireland



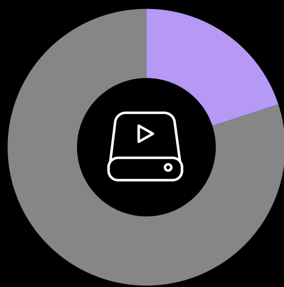
13%

2/15 released internationally only, in non-UK territories



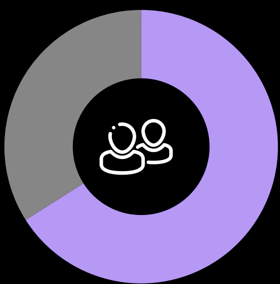
20%

3/15 self-distributed films



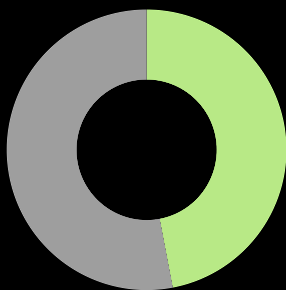
20%

3/15 released on VOD only



66%

10/15 limited release (less than 100 sites)



47%

offered exhibitor previews

Film Fact:

1015 films released in 2023, which is a slight increase on 929 films released in 2022 and more than double the 504 released following the pandemic in 2021. Cinemas have shown a slow recovery with UK admissions at 123.6m in 2023, 117.3m in 2022 (UKCA annual admissions). However, these align with figures from around the mid-1990s and not the highs of 176.1m of 2019. This could be connected to shorter or no theatrical runs, quality of content, streaming deals and potential saturation of the market for both distributors and exhibitors.

Performance

1 film grossed in excess of **£1m** at the box office (£7m)

Two other films grossed in excess of **£100k** (£610k and £102k)

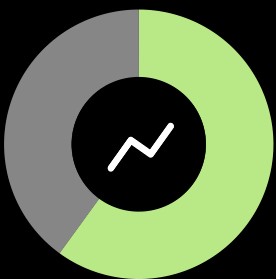
£7.9m in box office across the UK & Ireland

1,008,214 admissions in UK & Ireland (where data was available)

£216k (3.27%) of box office was in Wales

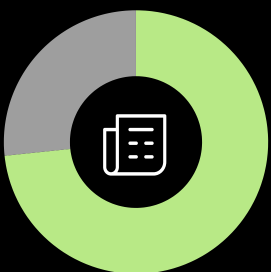
33,567 admissions at Welsh sites

Welsh market share was **3.27%** (3.11% in 2022 and 3.16% in 2023)



60% of the distributors submit data to Comscore - this does not include non-theatrical data, meaning admissions could be higher.

1 film received special event screenings (i.e. premieres, Q&As, cast and crew screenings) in Wales *(Twin Town).*

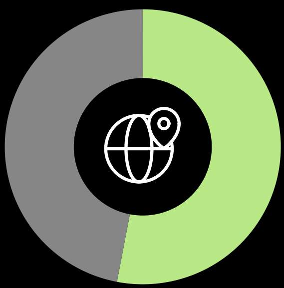


11/15 films received some sort of press or media attention that featured reference to the Welsh connection.

Film Fact:

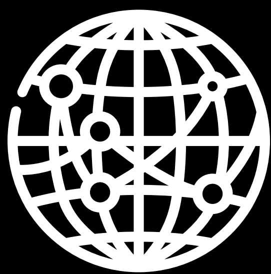
£7.9 million grossed across 15 films, which is more than three times the 22-23 report gross of £2.5 million and the 21-22 gross of £1.1million. While larger titles like *The Creator* only achieved 2.9% of total box office takings in Wales, that accounted for 80% of Wales' total income in this sample. Without *The Creator* or *Twin Town*, Welsh market share increases to 5.9% in the sample. *Twin Town* was screened exclusively in Wales, achieving 100% of the box office share and out performing other commercial titles with similar number of sites.

International Reception

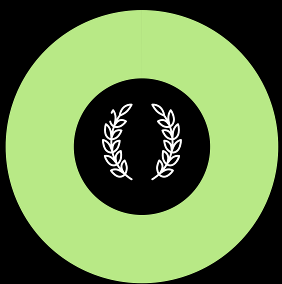


53%

8/15 titles had a theatrical release outside the UK & Ireland, which is a significant decrease from 92% in 22/23.

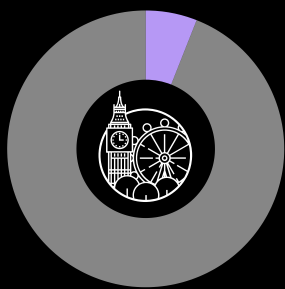


The largest UK releases also had the widest international reach.



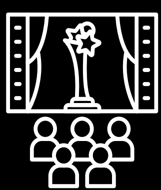
100%

secured at least one film festival



6%

of titles premiered at the London Film Festival in 23/24 (decrease from 30% in 22/23)



3 Films

featured at major international film festivals (*The Eternal Daughter, The Creator, Daliland)*

Film Fact:

Compared to previous years, festival representation declined. *The Eternal Daughter* was a notable exception, screening at the Toronto International Film Festival (TIFF), Venice, and the BFI London Film Festival (LFF), as well as various nominations. *The Creator* achieved significant recognition, winning 13 awards at smaller festivals and receiving 48 nominations overall, including two Oscar nominations and one BAFTA nomination. *Daliland* also screened at TIFF and six additional international festivals. No titles appeared at SXSW (compared to 8% in 2022–23) or Sundance (1 title in 22/23), 13% of titles appeared at TIFF (14% in 2022–23), and only 6% appeared at LFF (down from 30% in 2022–23). Many of the remaining titles did screen at smaller or genre-specific festivals.

Finance

Only two distribution budgets were disclosed – both at **£50-60k**

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

0% received BFI production funding (decrease from 15% in 22/23)

6.6% (1 film) received Ffilm Cymru Wales Production funding (decrease from 33% in 21)

0 received a Creative Wales award (decrease from 1 film in 2020). Four films received location/crew support.

0 titles received BFI distribution funding (decrease from 8% in 22/23) but 1 title was distributed directly by the BFI (The Eternal Daughter) along with 'locked box' (recouped income supports future projects)

0 titles received FFCW distribution funding

Spotlight:

CEO of FFCW Lee Walters noted that various factors in 23/24 could have affected the film's release strategies: "***Hollywood labour disruption (WGA / SAG-AFTRA strikes)*** *affected promotion windows, talent availability for premieres and some market activities, which compressed publicity opportunities for independent films during 2023 and into the festival calendar.* ***Changing UK funding environment*** *as the UK policy and tax landscape evolved in 2023–24 (and further announcements followed), including government measures and new tax credit discussions that altered producer/distributor planning. Some of the tax/credit changes (and the later Independent Film Tax Credit implementation timetable) became relevant to productions whose principal photography began after April 1, 2024 (which is outside of the scope of this report).* ***Sector recovery and festival strength*** *as festivals and exhibition continued to rebuild audience momentum after the pandemic, this helped visibility but also increased competition for slots and press.*" He added that "*small grants to help producers engage sales agents, attend key markets (Cannes, Berlin, Toronto) and fund festival submissions/promotional materials would be beneficial to tackle the classic indie gap between production and market traction.*"

Image: A Year in a Field (© Anti-Worlds Releasing)

Film Hub Wales Support

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

13% (2 films) were shown to exhibitors at Welsh Preview Days and **33%** (5 films) in the online preview room.

6.6% (1 film) received bespoke assets or support. Further films receiving asset support were delayed by strikes, or other factors.

Spotlight:

There is a common misconception that MIW has funds to offer for filmmaking or marketing. The project actually operates with just two days per week staff time and no wider activity funded. FHW advocate regularly for wider investment into marketing and distribution. Suggestions for wider support through Wales include connecting critics to titles more regularly, more visible marketing campaigns and branding, networking distributors with production companies, brokering funding conversations, and dedicated resources for specific audiences.

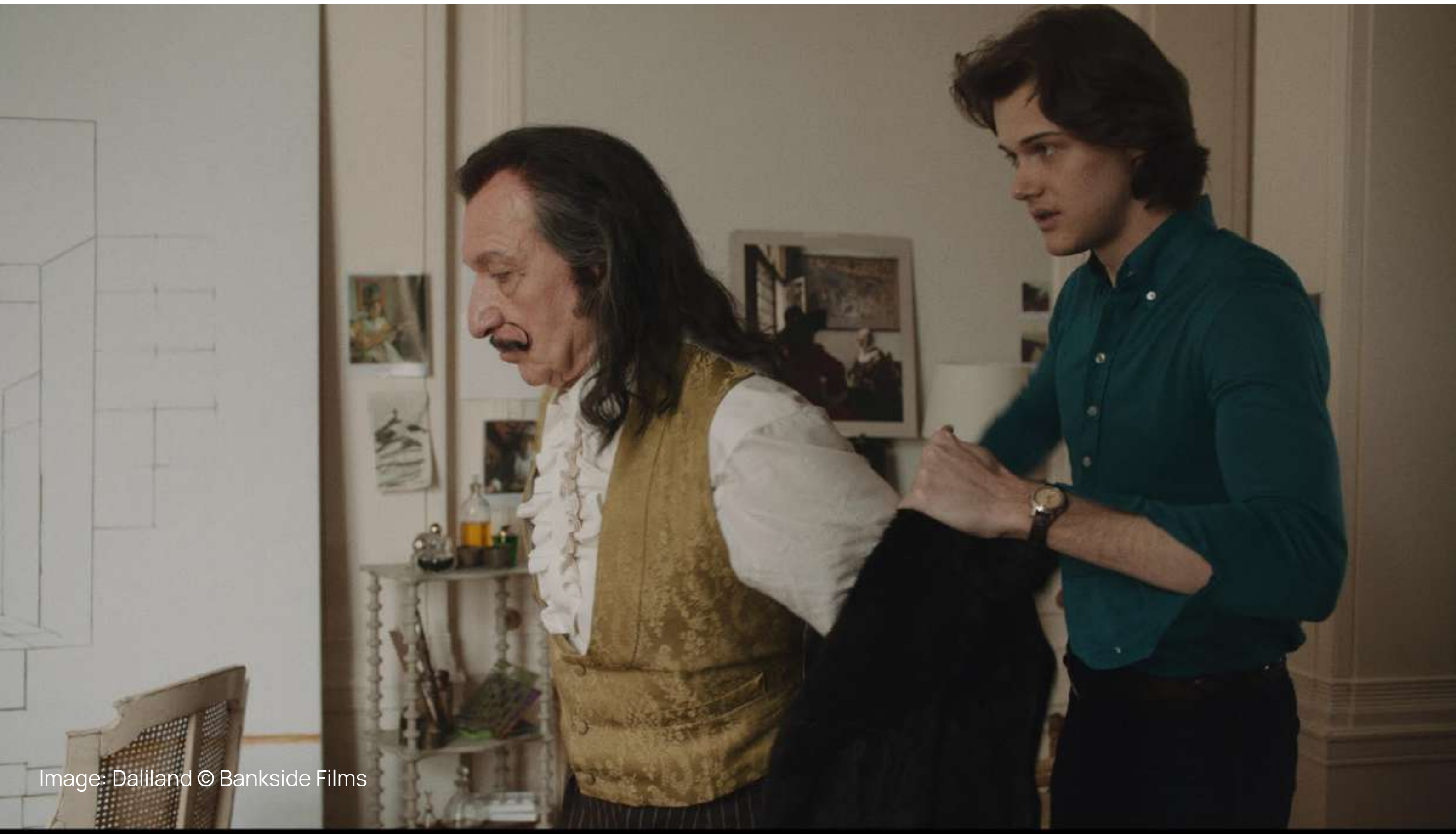


Image: Daliland © Bankside Films

“Anything that increases visibility at a consumer level would be helpful, as audiences need educating on what is coming out outside of studio releases. In turn, this would make it easier for cinemas to take the plunge and book if they knew there was consumer demand.”

- Distributor

Spotlight: The Eternal Daughter

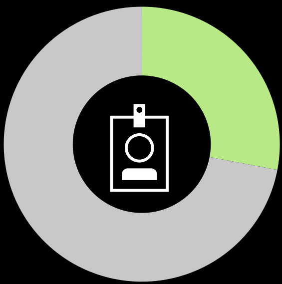
To support the release of the film, we created a pack with programming suggestions, news, reviews and social assets for exhibitors to promote the Welsh connections. We also created a video introduction from Welsh actor Carly-Sophia Davies, one third of the film’s cast and her debut role.

“The Eternal Daughter was shown in a handful of cinemas in Wales. Chapter Cardiff was the 15th best performing cinema for the release (a slightly higher position than usual for Chapter on a BFI-distributed film). A local press campaign for Broadcast/Press if budgets allow could help future releases (we have seen success with that activity on films we have distributed that have Cornish / SW connections).”

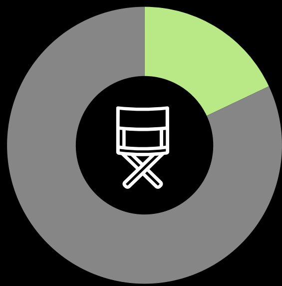
- BFI

Equality and Inclusion

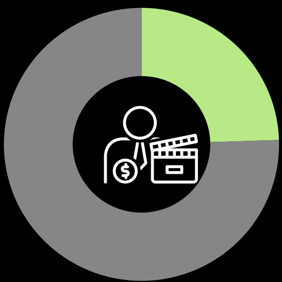
120 people were identified as key talent on the 15 films (listed credits as producer, director, writer or lead actor).



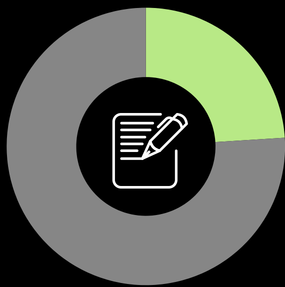
28% female, 72% male roles, 0% non-binary, (producers, directors, writers, lead actors)



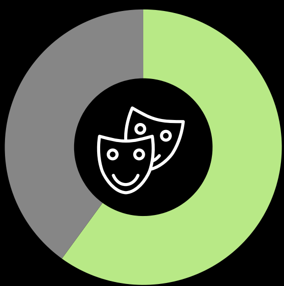
18% Female directors (decrease from 31% in 22/23, 40% in 21/22).



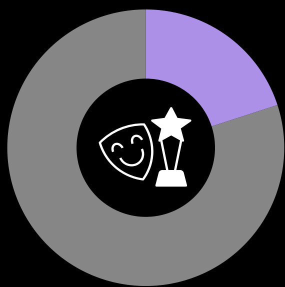
24% Female producers (36% in 22/23, 38% in 21/22).



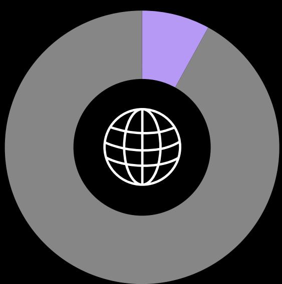
24% female writers (decrease from 40% 22/23 but increase from 8% in 21/22).



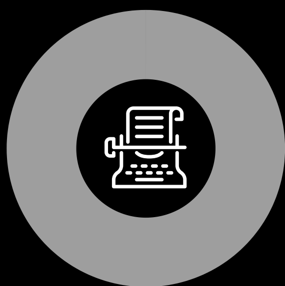
45% female/non-binary lead actors (decrease from 60%).



20% Black, Asian and Global Majority lead actors (decrease from 15% in 22/23).



8% Black, Asian and Global Majority producers and directors (decrease from 15% in 22/23).

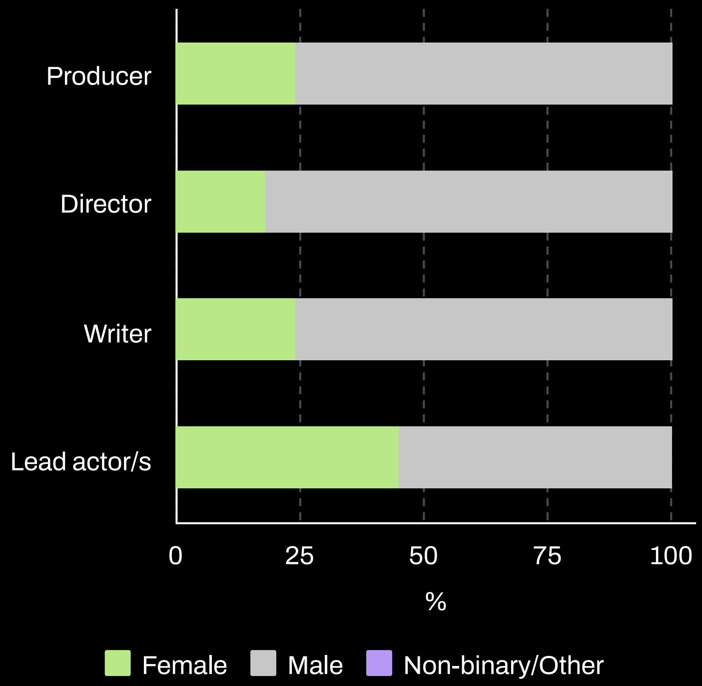


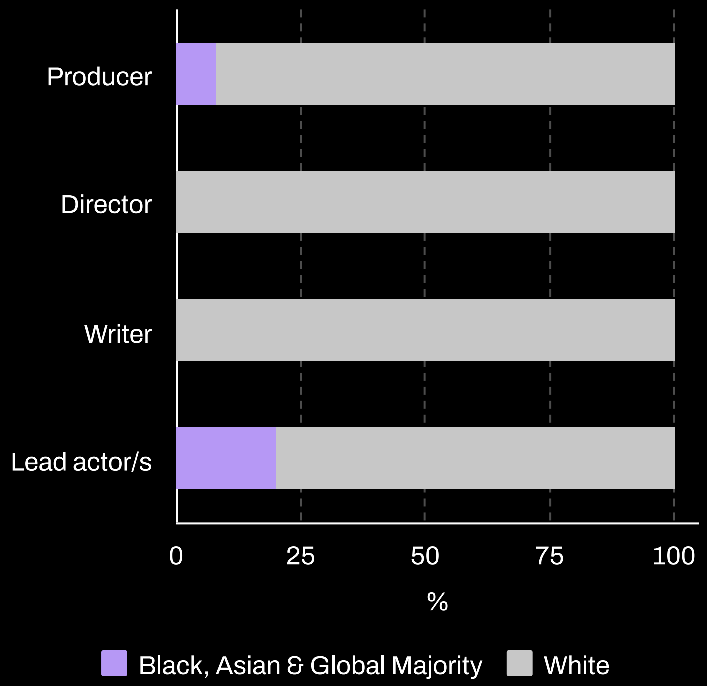
0% Black, Asian and Global Majority writers (decrease from 10% in 22/23).

Context:

USC Annenberg published a report exposing the decline in diversity in lead roles for women during 2023: “Fewer girls and women filled leading roles in 2023 compared to 2022 — the figure plummeted to 30%, on par with 2010 and a 14-percentage point decline from the year prior.” Unfortunately, our data correlates, though it should be noted that some delayed releases may have affected these figures. We are also conscious that the gathering of this data is problematic, as it is not being submitted by production teams/individuals who can self-identify and cannot account for disability, LGBT+ filmmakers, or intersectionality without significant additional investment. It should be noted that EDI data on Welsh productions is not currently made available publicly.

Breakdown by role





Language

0% (0/15) titles in Welsh language (decrease on 23% in 22/23)

0 bilingual (no change on 21/22)

73% (11/15) English language only (an increase on 61% in 22/23)

25% (4/15) titles featured international languages: French, Spanish, German and Thai (an increased on 15% in 22/23)

13% (2/15) titles received Welsh marketing materials from distributors (no change to 22/23)

While there were no Welsh language titles. Classic re-release Twin Town took **100%** of its box office in Wales, demonstrating the popularity of notably Welsh titles.

The % of Welsh talent per production is not currently made available publicly.

Spotlight:

Two films offered Welsh marketing materials — *Bolan's Shoes* and *Older Gods* - recognising the appeal of the film to Welsh audiences. It could be argued that this had an impact on its reasonable share of Welsh sites at 8.9%. Rightsholders cited lack of access to Welsh talent to support events and wraparound activity, limited budgets and lack of understanding of the benefits of creating Welsh resources as reasons why materials were not bilingual. With 29.2% of the population speaking Welsh and Citizens' Advice Bureau data suggesting that 82% of people said that they are more inclined to choose a company that provides a good Welsh language service, there is a clear argument to explore this as a way to build connections with new audiences.

Image: Bolan's Shoes (© Buffalo Dragon Films)

Conclusions

Fewer theatrical releases likely due to pressures following the pandemic, delays in production and distribution created by the writers' strike, rising industry costs, and changing audience behaviours, in particular the cost-of-living crisis.

Major titles like *The Creator* dominated box office earnings but films that **embraced and visibly promoted** their Welsh identity and links tended to perform better.

Press was inconsistent, with some films **lacking mention** of their Welsh identity entirely.

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

Festival participation declined overall, though films like *The Eternal Daughter* and *The Creator* received **significant recognition,** including awards and Oscar nominations.

Women held roughly **12-24%** of lead creative roles, while female lead roles dropped to **20%,** aligning with a broader trend of declining on-screen representation for women.

No films were released in the Welsh language and none were bilingual, though **4 featured other languages.** Two films offered Welsh language materials.

Data on LGBTQ+ and disability inclusion **remains sparse,** highlighting gaps in monitoring and steps towards improvement. Accessibility provisions were offered by only half of surveyed companies, primarily for higher-budget films.

Continued need for **greater commitment** and investment in the drive to build audiences for Welsh-connected film. A **cohesive effort** from funders, distributors, exhibitors, and producers of film, with a **coordinated approach** around targeted. engagement, meaningful diversity initiatives, accessibility, highlighting of Welsh film identity and language, would likely have major impacts towards the recognition.

Due to **gaps in support services,** there's expectation that MIW should offer more, but many of the suggestions fall outside of its remit, suggesting need for increased industry comms and visibility.

To find out more about how FHW supports films with Welsh connections, visit our website: filmhubwales.org

Image: And Then Come the Nightjars (© Munro Film Services)

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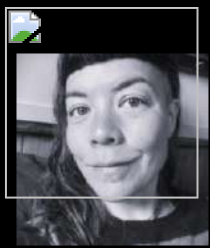

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