Finding Welsh Film Data 2024-2025

As part of our annual Welsh film data research, running since 2019, we commissioned Toki Allison to examine 16 films releasing between April 2024 - March 2025, with the aim of analysing how they performed in cinemas, and how our support contributed to their release. 24/25 was a busy year with a host of universal and international themes covered by Welsh filmmakers, as well as select titles filmed and set in Wales.

FILM HUB WALES
CANOLFAN FFILM CYMRU

Image: Chuck Chuck Baby © Studio Soho

Our Methodology

16
feature films

April 2024 - March 2025 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: Kensuke's Kingdom © Modern Films

Films















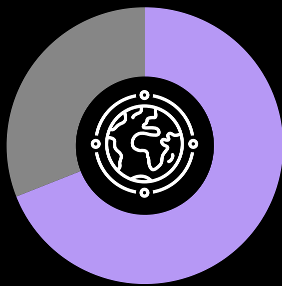

Images from top left:
Seize Them © *Entertainment Film Distribution,* **Swede Caroline** © *Picnik Entertainment Ltd,* **The Almond and the Seahorse** © *Picnik Entertainment Ltd,* **Freud's Last Session** © *Vertigo,* **Unicorns** © *Signature Entertainment,* **ChuckChuckBaby** © *Studio Soho,* **Gaza A Story of Love and War** © *Mike Joseph,* **Kensuke's Kingdom** © *Modern Films,* **Starve Acre** © *A House Productions film, supported by BBC Film, BFI and Access Entertainment,* **Timestalker** © *Western Edge Pictures,* **Portraits of Dangerous Women** © *Lenz Films,* **India's 1st Best Trans Model Agency** © *Spring Films,* **Comrade Tambo's London Recruits** © *Barefoot Rascals,* **On Becoming a Guinea Fowl** © *Picturehouse Entertainment,* **The Walk** © *Together Films,* **Satu - Year of the Rabbit** © *Sandwich Club Productions*

Our Findings

Distribution

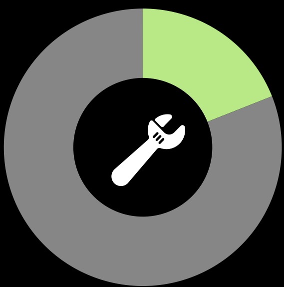
100%

(16/16) theatrically distributed in the UK and Ireland (60% in 23/24)



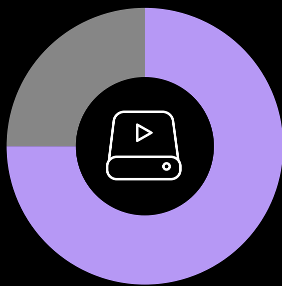
69%

(11/16) released internationally only, in non-UK territories



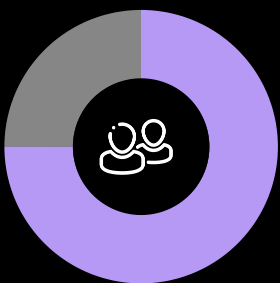
19%

(3/16) self-distributed films



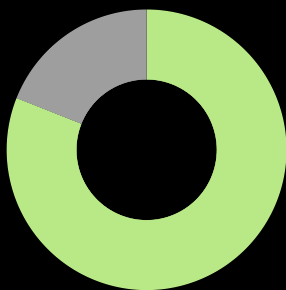
75%

(12/16) released on VOD only



75%

(12/16) limited release (less than 100 sites)



81%

(13/16) offered exhibitor previews

Film Fact:

6752 films released globally in 2024. The 2023 Hollywood strikes 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 and UK and Ireland recorded 138.2 million, 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).

Performance

2 highest grossing titles achieved **£250-300k** box office

3 other films grossed in excess of **£100k**

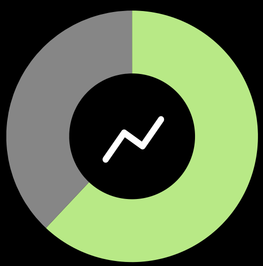
£1.18m in box office across the UK & Ireland (for the 13 titles that shared data)

Estimated **153,521** admissions in UK & Ireland (where data was available)

£45.6k (4%) of box office was in Wales (for 10 out of 16 titles)

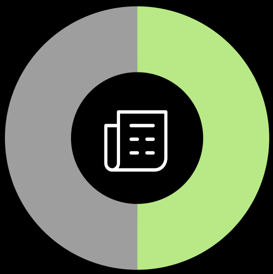
Estimated **5904** admissions at Welsh sites

Welsh market share was **4%** (3.27% in 2023, 3.11% in 2022 and 3.16% in 2023)



62% of the distributors submit data to Comscore - this does not include non-theatrical data, meaning admissions could be higher

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

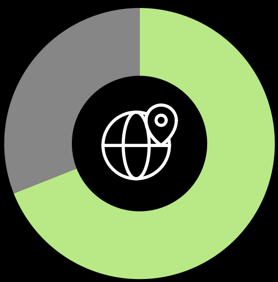


8 films received some sort of press or media attention that featured reference to the Welsh connection.

Film Fact:

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 (46.7% and 10.8%) and sites (17.5% and 75%). One contributing factor may be that these titles haver closer and visible Welsh connections in their promotional campaigns through the directors' proud Welsh identities and use of Welsh locations. 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).

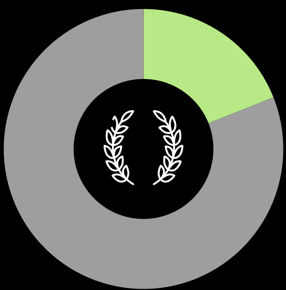
International Reception



69%

11 out of 16 titles had a theatrical release outside the UK & Ireland (53% in 23/24).

The largest UK releases also had the widest international reach.



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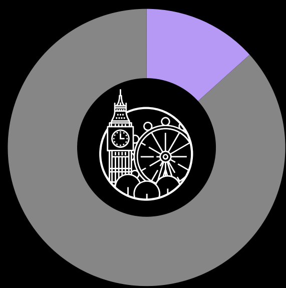
titles had no known festival screenings.



12%

of titles premiered at the London Film Festival in 23/24 (6% in 23/24).

6 Films

featured at major international film festivals (*Unicorns, Chuck Chuck Baby, On Becoming a Guinea Fowl, Starve Acre, Timestalker*).

Film Fact:

Compared with previous years, festival representation increased overall across both the major and more niche film festivals. Some figures are reasonably comparable with previous years – 6% at SXSW (0% in 23/24, 8% in 22/23), 12.5% at TIFF (13% in 23/24, 14% in 22/23), 12.5% at LFF (6% in 23/24, 30% in 22/23). 18.7% of titles did play at Cannes, whereas none of the films in the previous year did, showing a move towards visibility at this major festival. No titles in the past two years have played at Sundance. Seven titles also received awards wins or nominations.

Finance

9 distribution budgets were disclosed – ranging from **£2-65k**

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

19% (3 films) received BFI production funding (increase from 0% in 23/24)

38% (6 films) received Ffilm Cymru Wales Production funding (increase from 6.6% in 23/24)

19% (3 films) received a Creative Wales production award (increase from 0% film in 22/23).

7 films received festival distribution or P&A (Print & Advertising) awards (increase from 0% in 23/24). 1 title was distributed directly by the BFI (Starve Acre).

25% (4 films) received impact funding for distribution or exhibition from FfCW (increase from 0% film in 22/23).

Film Fact:

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. 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, devoted to releasing British films. Vue Cinemas also launched a distribution arm, Vue Lumière. As seen previously, very few Welsh connected titles released through major distributors with only *Seize Them* through Entertainment Film and *On Becoming a Guinea Fowl* picked up by commercial-arthouse distributor Picturehouse. There were no Welsh releases from the bigger distributors such as Universal, Warner Bros or Disney in the period.

Image: Seize Them © Entertainment Film Distribution

Film Hub Wales Support

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

44% (7 films) were shown to exhibitors at Welsh Preview Days and **56%** (9 films) in the online preview room.

63% (10 films) received bespoke assets or support.

Spotlight: Satu: Year of the Rabbit

FHW supported Sandwich Club Productions and Powys-born director Joshua Trigg with a self-distribution plan for this debut feature. The film transports audiences to Laos as they follow two children on a stunning coming-of-age quest to find their families, friendship and the beauty of everyday life. As well as a support pack, FHW created a set of assets, including an audio podcast, video interview and social clips of a discussion between Trigg and interviewer, filmmaker and BFI Film Academy+ member Ash Kriengsak.

Image: Satu - Year of the Rabbit © Sandwich Club Productions

"I really appreciate everything that you have done / are doing for Comrade Tambo's London Recruits. The solid support across socials, generating that great content last year and the relentless marketing and promotion has been amazing. Plus all the other things I don't know about in the background."

- Director, Gordon Main

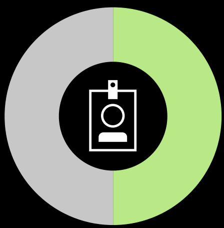
Spotlight: Comrade Tambo's London Recruits

Set at the height of apartheid, in the late sixties/early seventies, the film follows international working-class students and workers living in London who answered Oliver Tambo's secret call for undercover agents, bringing hope to his embattled people in South Africa. FHW launched a support pack for exhibitors, as well as a suite of assets to support the "people's release" of this title in which Barefoot Rascals' director Gordon Main approached community activist organisations and trade unions to set up screenings across Wales and the UK. FHW invited Wales' first black female councillor and powerful advocate for ethnic minority women in Wales, Gaynor Legall, and award-winning documentary filmmaker Prof Florence Ayisi to talk with Gordon about the film and the history of apartheid in Wales. This was made available as an audio podcast, Q&A video and social media clips. FHW also asked Maya Pillay - British/South African actor, writer, activist and director of inclusive children's literary project (Books from Herbie) to write an article about the film's themes which was published in Buzz Magazine.

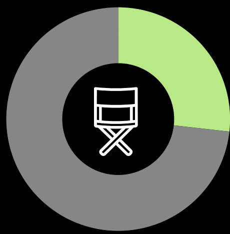
Image: Comrade Tambo's London Recruits © Barefoot Rascals

Equality and Inclusion

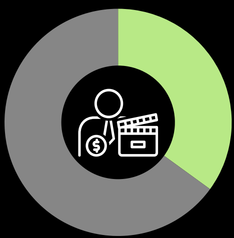
118 people were identified as key talent on the 16 films (listed credits as producer, director, writer or lead actor).



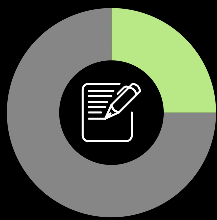
50% Female, 50% male roles, 0% non-binary, (producers, directors, writers, lead actors)



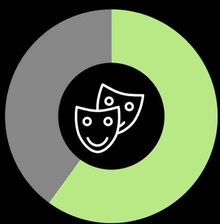
30% Female directors (increase from 18% in 23/24, 31% in 22/23, 40% in 21/22).



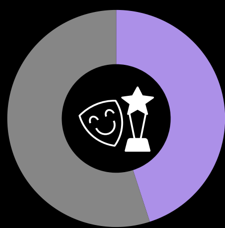
35% Female producers (24% in 23/24, 36% in 22/23, 38% in 21/22).



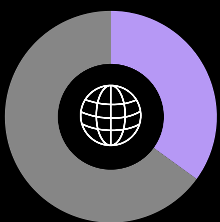
25% Female writers (increase from 24% in 23/24, 40% 22/23 but increase from 8% in 21/22).



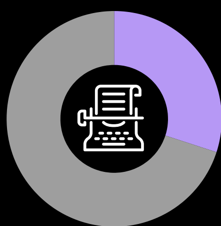
47% Female/non-binary lead actors (increase from 45% 23/24, 60% 22/23).



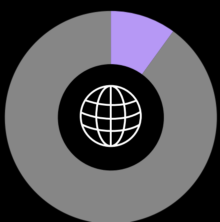
45% Black, Asian and Global Majority lead actors (increase from 20% in 23/24, 15% in 22/23).



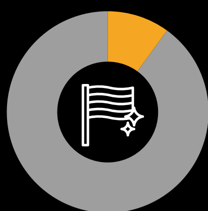
35% Black, Asian and Global Majority directors (increase from 0% in 23/24, 15% 22/23).



30% Black, Asian and Global Majority writers (increase from 0% in 23/24, 10% in 22/23).



10% Black, Asian and Global Majority producers (increase from 8% in 23/24, 15% in 22/23).



10% LGBT+ directors, 10% writers, 10% lead actors.

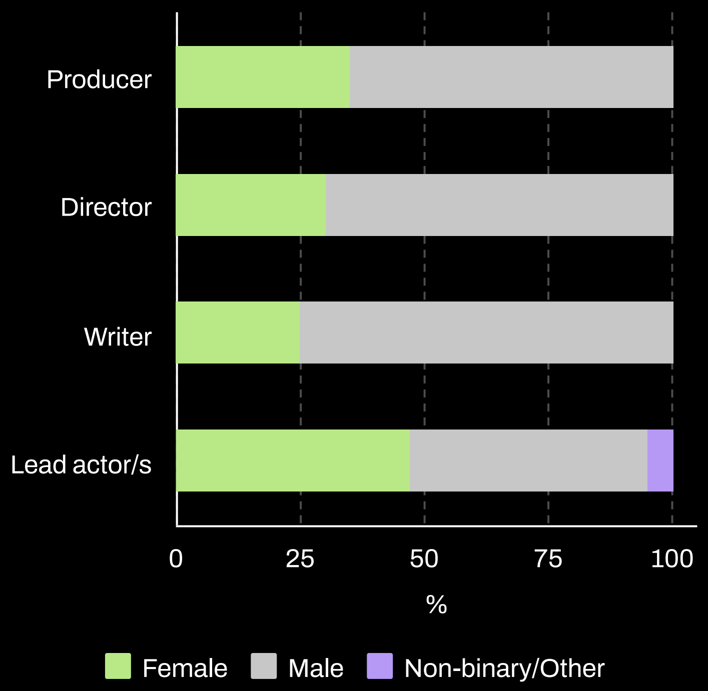
5% working class directors, 5% writers, 2% lead actors, 0% producers.

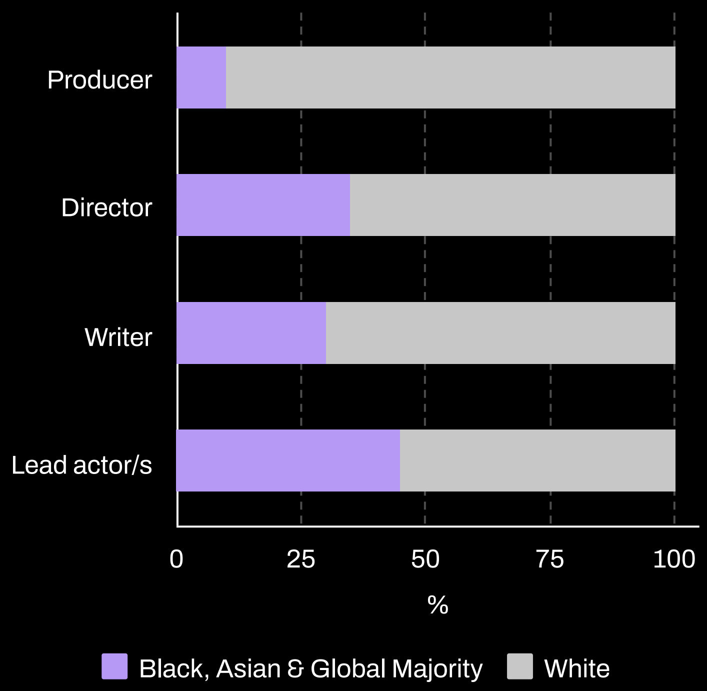
Context:

US studies in 2024 suggest that 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. The Celluloid Ceiling study noted that *"in 2024, women accounted for 20% of editors, the same percentage as in 1998. No sustained forward movement in over a quarter century."* UCLA Hollywood Diversity report 2025 noted that 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.

UK reports show similar patterns with women directors at approximately 20-24% of UK theatrical features. The Welsh sample shows an improvement in gender representation and ethnic diversity across director, writer and lead actor roles. It should be noted that EDI data on Welsh productions is not currently available publicly meaning 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 intersectionality, which would require significant additional investment.

Breakdown by role





Breakdown by role

	Director	Writer	Lead Actor/s	Producer
LGBTQIA+	10%	10%	9%	0%
Deaf, disabled, neurodivergent	0%	5%	4%	0%
Working Class	5%	5%	2%	0%

Language

0% (0/16) titles in Welsh language (0% in 23/24, 23% in 22/23)

0 bilingual (no change in 23/24 or 22/23)

81% (13/16) English language only (an increase from 73% in 23/24, 61% in 22/23)

19% (3/16) titles featured international languages: Gujarati, German, Hebrew, Lao and Bemba (a decreased on 25% in 23/24, 15% in 22/23)

0% (0/16) titles received Welsh marketing materials from distributors (a decrease from 13% in 23/24, 0% 22/23)

While there were no Welsh language titles, Wales based *Chuck Chuck Baby* did **75%** of its revenue in Wales, demonstrating the popularity of notably Welsh titles.

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

Spotlight:

6 of the 16 titles delivered Q&As and special events in Wales to promote their films. Two such titles (*Chuck Chuck Baby* and *The Almond and the Seahorse*) overperformed against the average Welsh share of box office and sites. They also hosted multiple Q&As and previews and explicitly publicised their Welshness. 8 of the 16 films received press coverage that alluded to their Welsh connections in media outside of Wales, 7 received coverage within Wales. Very little major coverage 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 contextual detail.

"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."

- BFI Director of the Filmmaking Fund, Mia Bays

Conclusions

All 16 titles had a theatrical release - an increase from 9/15 in 23/24, suggesting a return to previous release patterns.

Global box office fell 7% in 2024 to $30bn but UK admissions grew for the fourth year, **nearly doubling** UK independent film box office share (6.9%, up from 3.8%), though overall UK box office revenue (£979m) remained 22% below 2019 levels.

Welsh box office share was **4%**, an improvement on 23/24's 3.27% but still below the 5.2% Welsh population share (2021 Census), suggesting the market may be normalising at a lower level to pre-2022 levels, or that type of film and release strategy is key.

Films that leant into their Welsh identity **performed better** in Wales. Chuck Chuck Baby and The Almond and the Seahorse outperformed the sample on Welsh box office share and number of sites.

Only **8 out of 16** films had their Welsh connection mentioned in UK/international press, 7 in Welsh media, and coverage was mostly a single reference, other than on FHW channels,

No titles had Welsh language marketing materials, continuing last year's pattern, despite the 29.2% Welsh speaking population and **clear evidence** (Welsh Language Commissioner/Citizens Advice data) that Welsh-language services increase engagement.

69% of titles had an international release (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, with more titles in receipt of FFCW production and impact funding, BFI P&A/festival support and Creative Wales investment.

Indie/low-budget titles face financial challenges. Several broke even at best, one made a significant loss, and one spent 53% of box office income on its campaign. Distributors cite capacity, awareness and funding gaps as the main constraints, **not lack of audience interest.**

FHW's practical support is valued but **lack of distribution/ marketing budget** is repeatedly flagged as the key limiting factor, suggesting investment and capacity to distribute awards into exhibition or distribution could make a major difference.

Gender representation **improved slightly** on 23/24. Global Majority representation **rose substantially** across director/writer/lead roles but not producers. Deaf/disabled/ neurodivergent representation **remained low** and a new baseline has been set for working-class and LGBT+ representation.

Independent cinemas face compressed theatrical windows, fewer mid-budget comedies/dramas and UK distributor losses (eOne, Pathé exits). 46 of the UK's top 50 films in 2024 came from studios, **squeezing space** for smaller Welsh-connected titles. Only two titles in the whole sample secured releases through recognisable mid-size distributors (Entertainment Film, Picturehouse), meaning Welsh-connected film is **reliant on** the stretched independent distribution ecosystem.

Welsh exhibitors are operating in a harder cost-of-living and funding environment. The introduction of the Creative Wales production fund (delivered via FfCW) is a **notable development** in this period, though **Wales lacks** a specific distribution/ marketing- funding stream.

Recommendations

A. Visibility of Welsh Connections in Media

- Share data on the impact of highlighting Welsh connections to make the commercial case for doing so
- Request Welsh references/boilerplate text in press releases and social copy as standard
- Encourage funders to ring-fence a small proportion of production/distribution awards specifically for promoting Welsh connections
- With further investment, MIW's editorial/press function could be scaled up

B. Welsh Language Engagement

- Provide clear, simple guidance to distributors on providing Welsh language marketing materials, with a simple decision framework for when/how to use.
- Key marketing assets in Welsh could become a funded MIW offer if resourced.

C. Release Strategy & Previews

- Expand resource for Welsh Film Preview Days and the online Preview Room, as they are highly valued by exhibitors, reducing reliance on London-based previews.
- Encourage earlier engagement between distributors and FHW.

D. International Reception & Festivals

- Ensuremajor festival play or awards recognitionis 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.

E. Budgets & Distribution Funding

- Advocate for a dedicated Welsh distribution/marketing fund to sit alongside existing production funding routes.
- Promote awareness of the UK Global Screen Fund's P&A strand.
- If funded, MIW could administer a small, ring-fenced "Welsh release support fund" to co-finance marketing/touring activity for selected titles.

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

- Continue to be transparent with distributors from first contact about what FHW can and cannot offer.
- Track booking sources methodically to better evidence FHW's impact.
- Expand exhibitor meet-ups and relationship development, which distributors consistently rate as valuable,
- 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 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
- 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.
- Funders to 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.

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

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