

Film production in the UK, first half year (H1) 2011

BFI Research and Statistics Unit

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1. Total film production in the UK in H1 2011

There were 46 films with budgets of £500k or more that commenced principal photography in the UK in H1 2011, the lowest first half figure since our records began in 2003. Twenty were domestic UK features, 17 were co-productions and nine were inward investment films. The number of co-productions increased from H1 2010 but the number of domestic and inward investment films declined (Table 1).

Table 1: Number of features produced in the UK in H1 2003–H1 2011

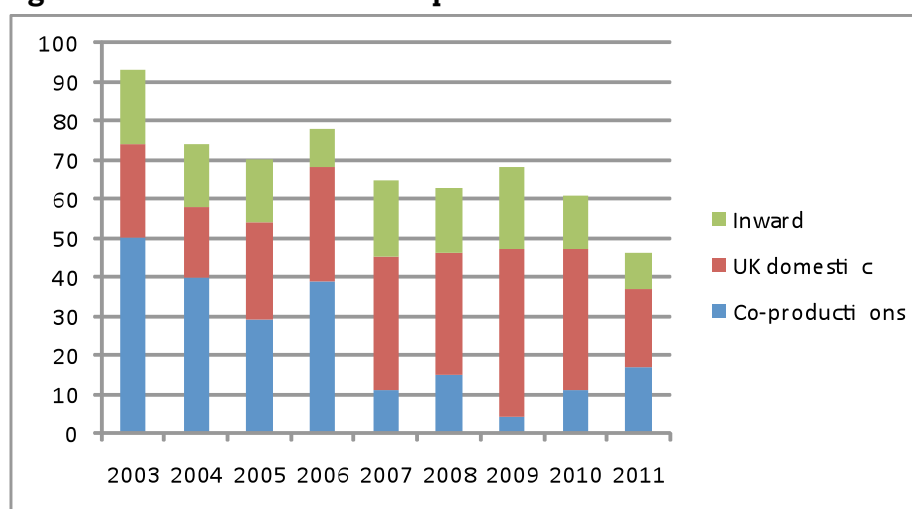
| | H1 2003 | H1 2004 | H1 2005 | H1 2006 | H1 2007 | H1 2008 | H1 2009 | H1 2010 | H1 2011 |
|---------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Co-productions | 50 | 40 | 29 | 39 | 11 | 15 | 4 | 11 | 17 |
| UK domestic features | 24 | 18 | 25 | 29 | 34 | 31 | 43 | 36 | 20 |
| Inward investment feature films | 19 | 16 | 16 | 10 | 20 | 17 | 21 | 14 | 9 |
| Total | 93 | 74 | 70 | 78 | 65 | 63 | 68 | 61 | 46 |

Source: BFI

Data for films with budgets \geq £500,000

Films are allocated to the calendar half year in which principal photography commenced.

Figure 1: Number of features produced in the UK in H1 2003–H1 2011



Source: BFI

Data for films with budgets \geq £500,000

Films are allocated to the calendar half year in which principal photography commenced.

Significant inward investment titles in H1 2011 included *47 Ronin*, *The Dark Knight Rises*, *Dark Shadows*, *Gambit*, *Prometheus* and *World War Z*.

Domestic UK titles in H1 2011 included *The Inbetweeners Movie*, *The Iron Lady*, *Cockneys Vs Zombies*, *Elfie Hopkins*, *Outpost II: Black Sun* and *Whole Lotta Sole*.

Co-productions in H1 2011 included *360*, *1884: Yesterday's Future*, *The Angels' Share* and *Streetdance 2 3D*.

The UK spend of features that commenced principal photography in the first half of 2011 was £771 million, driven mainly by a record level of inward investment. UK spend of co-productions (£32.9 million) was the highest for three years but the UK spend of UK domestic productions (made with budgets over £500,000) was the lowest on record (£38.9 million) (Table 2 and Figure 2). This continues the divergent trend of the last few years – the UK inward investment sector has been buoyant while the domestic sector has been under financial pressure.

Table 2: UK spend of features produced in the UK in H1 2003–H1 2011, £ millions

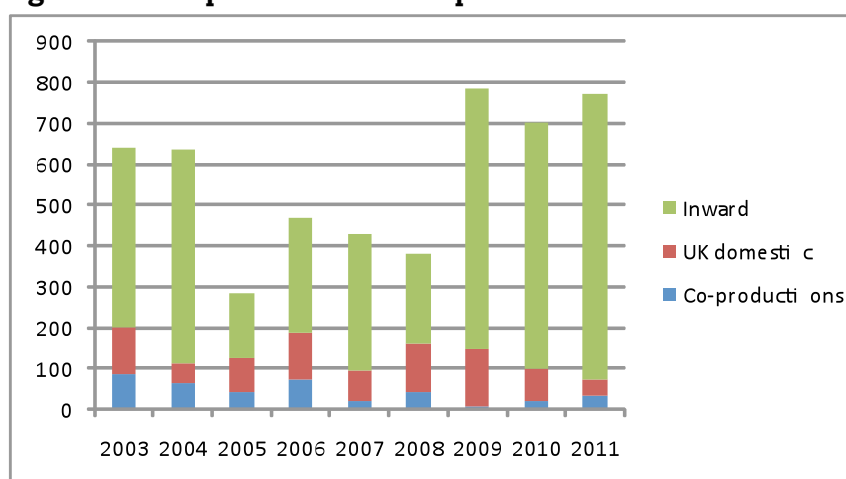
| | H1 2003 | H1 2004 | H1 2005 | H1 2006 | H1 2007 | H1 2008 | H1 2009 | H1 2010 | H1 2011 |
|---------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Co-productions | 85.3 | 65.5 | 40.5 | 74.1 | 19.4 | 42.4 | 9.1 | 18.9 | 32.9 |
| UK domestic features | 114.7 | 49.3 | 84.4 | 111.6 | 75.2 | 120.6 | 139.4 | 82.6 | 38.9 |
| Inward investment feature films | 440.0 | 520.7 | 160.1 | 283.4 | 333.2 | 220.0 | 637.2 | 601.7 | 699.6 |
| Total | 640.0 | 635.5 | 285.1 | 469.1 | 427.8 | 383.0 | 785.7 | 703.2 | 771.4 |

Source: BFI

Data for films with budgets >= £500,000

Films are allocated to the calendar half year in which principal photography commenced.

Figure 2: UK spend of features produced in the UK in H1 2003–H1 2011, £millions



Source: BFI

Data for films with budgets >= £500,000

Films are allocated to the calendar half year in which principal photography commenced.

2. UK independent films in H1 2011

Looking at UK independent films alone, we see a declining H1 trend since 2003 (Table 3 and Figure 3). Although the categories cannot be shown separately because of the small number of titles in some categories in a given half year, the decline is principally due to the decline in co-productions from 2003 and 2009 and the recent fall in the number of domestic titles.

Table 3: Number and UK spend of UK independent films in H1 2003–H1 2011

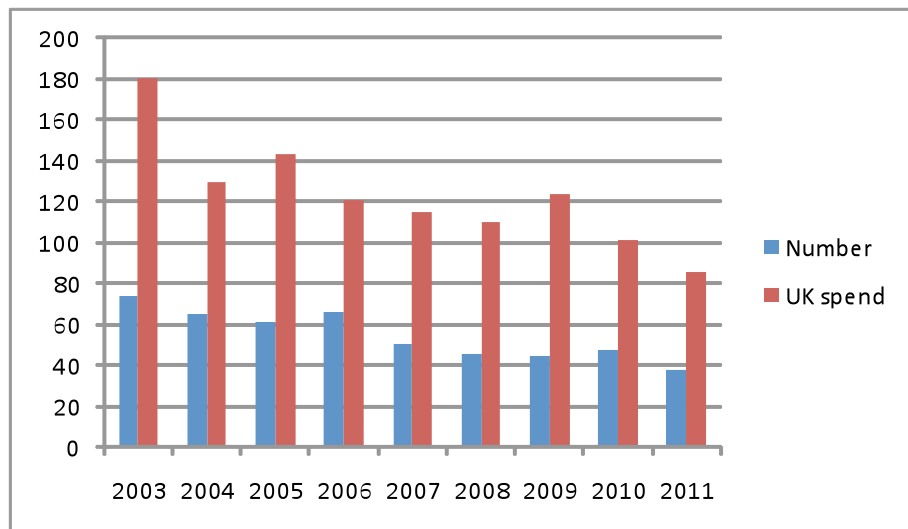
| | H12003 | H12004 | H12005 | H12006 | H12007 | H12008 | H12009 | H12010 | H12011 |
|------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Number | 74 | 65 | 61 | 66 | 50 | 46 | 45 | 48 | 38 |
| UK spend £ millions | 180.3 | 130.0 | 143.1 | 120.3 | 114.4 | 110.1 | 123.4 | 101.4 | 85.4 |

Source: BFI

Data for films with budgets \geq £500,000

Films are allocated to the calendar half year in which principal photography commenced.

Figure 3: Number and UK spend of UK independent films in H1 2003-H1 2011



Source: BFI

Data for films with budgets \geq £500,000

Films are allocated to the calendar half year in which principal photography commenced.

3. Low budget films in H1 2011

In our previous analyses of UK production activity we have applied a minimum budget of £500,000 but we know from a variety of sources¹ that there is a substantial number of films made below this level. Furthermore, we have seen a large fall in the median budget of UK films (to £600,000 for H1 2011 interim Cultural Test certifications) which suggests that the £500,000 limit is now too high. Therefore, we have now extended the scope of production tracking to include feature films with budgets under £500,000.

There were 53 films with budgets less than £500,000 that commenced principal photography in the first half of 2011 and the total value of their UK spend was £5.9 million (Table 4). 47 of the films were domestic productions, which if added to the number of films listed in section 1 above would boost the total number of domestic films of all budget levels to 67 and UK spend of domestic productions to £44.3 million.

Table 4: Number and value of low budget production in the UK H1 2008-H1 2011

| | H1 2008 | H1 2009 | H1 2010 | H1 2011 |
|-------------------------------|---------|---------|---------|---------|
| Number of films | 67 | 70 | 91 | 53 |
| Value of UK spend (£ million) | 8.2 | 9.4 | 9.4 | 5.9 |

Source: BFI

A full analysis of lower budget films from 2008-2010 can be found in the BFI Statistical Yearbook 2010/11².

¹ British film certification statistics 1998-2011 and the report *Low and Micro-Budget Film Production in the UK*, UK Film Council, 2008.

² <http://statisticalyearbook11.ry.com>

Notes

1. BFI Research and Statistics Unit production tracking

The Research and Statistics Unit production tracking system attempts to track all films produced in whole or part in the UK (i.e. it is a census, not a sample).

Sources of information include industry tracking forums, Skillset, trade press and internet sources, the British Film Commission, UK film certification data and direct approaches to film producers.

We do not have comprehensive coverage of very low budget films before 2011 so we publish data only for films with budgets of £500k+.

Only productions with some UK spend on shooting, visual effects or post-production are included.

Spend is allocated to the calendar year, half year and quarter in which principal photography starts.

2. Revisions

Production tracking is a continuous process and numbers are updated each quarter to reflect newly tracked films, updated budget or UK spend information and postponements or cancellations. Adjustments apply to previous periods as well as to the most recent reported period. The tables in this report contain revised data.

3. Definitions

A **domestic** (indigenous) UK feature is a feature made by a UK production company that is produced wholly or partly in the UK

A **UK co-production** is a co-production (other than an inward co-production) involving the UK and other country partners usually under the terms of a bilateral co-production agreement or the European Convention on Cinematographic Co-production.

An **inward feature** is a feature film which is substantially financed and controlled from outside the UK, where the production is attracted to the UK because of script requirements, the UK's infrastructure or UK tax incentives. Many (but not all) inward features are UK films by virtue of their UK cultural content and the fact that they pass the Cultural Test administered by the BFI Certification Unit on behalf of the Secretary of State for Culture, Olympics, Media and Sport.

An **inward feature co-production** is an official co-production that originates from outside the co-production treaty countries (usually from the USA) and which is attracted to the UK because of script requirements, the UK's infrastructure or UK tax incentives

A **VFX-only film** is a film that has a substantial quantity of digital visual effects made in the UK at one of the UK's main VFX houses but no other UK spend.

Inward investment (INW) is the total of inward features, inward feature co-productions and VFX-only inward investment films. These are summed as the number of inward co-productions is usually low, so showing their budgets or UK spend separately would be disclosive.

A **UK film** is a film that has been certified as British by the DCMS or by the Certification Unit of the British Film Institute (acting on the authority of the Secretary of State for Culture, Olympics, Media and Sport) or which is a *de facto* UK film by virtue of being made in whole or part in the UK by a UK production company.

A **US studio film** is a film that is produced in whole or part by one of the major US studios or one of the major US studios' specialist subsidiaries.

An **independent film** is a film made by an independent production company or group of independent production companies.

US studio films are generally distributed in most territories by the parent studio. Independent films are usually distributed by different distributors in different territories.

4. Disclosing individual film information

Individual film titles are not disclosed when the number of productions (co-production, domestic or inward) is low.

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