BFI
Film Forever

FILM INDUSTRY COMPANIES

BFI Research and Statistics

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Image: *Bypass* courtesy of Third Films

FILM INDUSTRY COMPANIES

IN THE UK, THE MAJORITY OF FILM INDUSTRY COMPANIES ARE IN THE PRODUCTION AND POST-PRODUCTION SECTORS, BUT MOST OF THESE ARE SMALL COMPANIES. THE EXHIBITION SECTOR HAS THE GREATEST PROPORTION OF LARGE COMPANIES, THE TOP 10 OF WHICH GENERATED 92% OF THE SECTOR'S TOTAL TURNOVER IN 2014.

FACTS IN FOCUS

- In 2014, there were over 6,000 film production companies and over 2,400 post-production companies in the UK.
- There were 405 film distributors and 215 film exhibitors.
- The majority of companies were small (turnover under £250,000).
- The production, post-production and distribution sectors were concentrated in London and the South East, while the exhibition sector was more dispersed.
- Outside London and the South East there were significant production and post-production clusters in the East of England, South West and North West.

NUMBER OF COMPANIES IN THE FILM INDUSTRY

The number of companies involved in the film industry has grown by 32% since 2009, compared to the UK all industries average of 5%. The most significant growth was seen in the number of video production (273%) and video distribution (100%) companies, which might partly be explained by the rise in demand for online audiovisual content. The number of film production companies has increased by 24%. In this instance, the growth may reflect the number of special purpose vehicles (SPVs) created for specific productions but which remain in existence as companies after the completion of those titles. (These SPVs will not usually be involved in the production of any other film). The number of film, video and TV post-production, film distribution and film exhibition companies has remained broadly stable since 2009.

In 2014 there were 6,090 film production companies, 2,465 film, video and TV post-production companies, 405 film distribution companies and 215 film exhibition companies.

Table 1.1 Number of film and video companies by sub-sector, 2009-2014

Sub-sector	2009	2010	2011	2012	2013	2014	Growth 2009-2014 (%)
Film production	4,905	4,795	4,845	5,190	5,450	6,090	24.2
Video production	590	855	1,105	1,470	1,905	2,200	272.9
Film, video and TV post-production*	2,470	2,365	2,265	2,205	2,240	2,465	-0.2
Film distribution	420	395	420	415	395	405	-3.6
Video distribution	40	45	45	60	75	80	100.0
Film exhibition	225	225	210	205	215	215	-4.4
Total	**8,650**	**8,680**	**8,890**	**9,545**	**10,280**	**11,455**	**32.4**
UK all industries	2,152,400	2,100,370	2,080,860	2,149,190	2,167,580	2,263,645	5.2

Source: Office for National Statistics
Notes:
Data as at March 2014.
* Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Video production company turnover saw the most significant rise between 2009 and 2014 (48%) but film production and distribution companies accounted for the largest proportions of turnover in the period (Table 1.2).

In 2014 the turnover of film production companies was £2,968 million, an increase of 20% compared with 2009. Film, video and TV post-production company turnover was £1,389 million, an increase of 10% on 2009, and film exhibition company turnover was £1,276 million, a similar figure to the previous two years, but an increase of 25% compared with 2009.

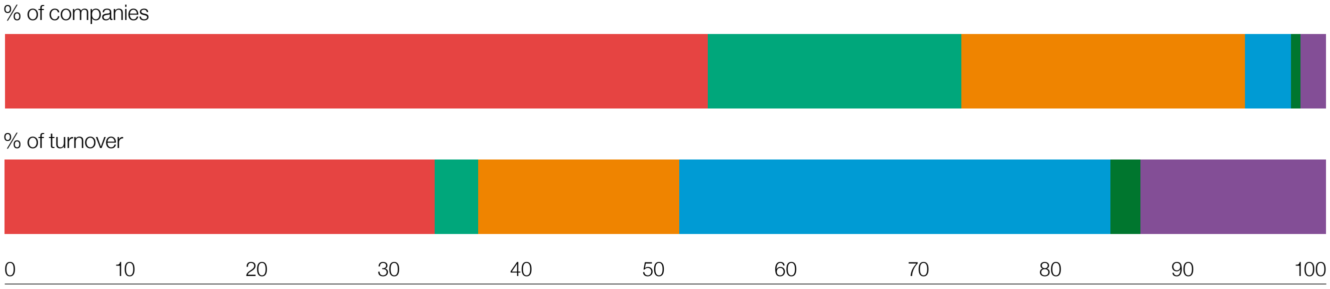
Table 1.2 Turnover of film and video companies by sub-sector, £ 000, 2009-2014

Sub-sector	2009	2010	2011	2012	2013	2014	Growth 2009-2014 (%)
Film production	2,471,123	2,656,494	2,407,913	2,688,724	2,760,227	2,968,092	20.1
Video production	204,281	210,038	152,775	186,902	263,009	301,630	47.7
Film, video and TV post-production	1,267,039	1,327,739	1,416,379	1,493,355	1,434,894	1,389,338	9.7
Film distribution	2,872,355	2,689,156	2,784,818	1,538,451	1,579,168	2,976,370	3.6
Video distribution	188,624	149,139	130,629	272,039	180,001	214,128	13.5
Film exhibition	1,019,372	963,578	1,183,590	1,277,739	1,261,656	1,275,566	25.1
Total	**8,022,794**	**7,996,144**	**8,076,104**	**7,457,210**	**7,478,955**	**9,125,124**	**13.7**

Source: Office for National Statistics
See notes to Table 1.1.

As Figure 1 shows, in 2014 although film distributors represented less than 4% of film industry companies, they accounted for one third (33%) of film industry turnover. This reflects the dominant position of the UK subsidiaries of the major US studios in the film value chain. Film, video and TV post-production companies represented 22% of companies and 15% of total turnover.

Figure 1 Percentage of film and video companies and turnover by sub-sector, 2014



	% of companies	% of turnover
Film production	53.2	32.5
Video production	19.2	3.3
Film, video and TV post-production	21.5	15.2
Film distribution	3.5	32.6
Video distribution	0.7	2.3
Film exhibition	1.9	14.0

Source: Office for National Statistics
See notes to Table 1.1.

SIZE DISTRIBUTION OF FILM COMPANIES

The size distribution of film companies in 2014 is shown in Tables 1.3 to 1.6. In all sectors, the majority of companies were very small with turnover less than £250,000 per year.

Table 1.3 Size distribution of film production companies, 2014

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	100	1.6	c	c
1,000 – 4,999	335	5.5	693,997	23.4
500 – 999	270	4.4	180,082	6.1
250 – 499	480	7.9	158,006	5.3
100 – 249	1,590	26.1	220,912	7.4
50 – 99	1,745	28.7	124,750	4.2
0 – 49	1,570	25.8	c	c
Total	**6,090**	**100.0**	**2,968,092**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2014.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Table 1.4 Size distribution of post-production companies, 2014

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	50	2.0	889,669	64.0
1,000 – 4,999	110	4.4	232,158	16.7
500 – 999	95	3.9	63,397	4.6
250 – 499	140	5.7	48,221	3.5
100 – 249	605	24.5	82,766	6.0
50 – 99	795	32.2	56,374	4.1
0 – 49	670	27.2	16,753	1.2
Total	**2,465**	**100.0**	**1,389,338**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2014.
Percentages may not sum to 100 due to rounding.

Table 1.5 Size distribution of film distribution companies, 2014

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	35	8.6	c	c
1,000 – 4,999	45	11.1	c	c
500 – 999	40	9.9	c	c
250 – 499	35	8.6	c	c
100 – 249	95	23.5	13,673	0.5
50 – 99	75	18.5	5,228	0.2
0 – 49	80	19.8	1,650	0.1
Total	**405**	**100.0**	**2,976,370**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2014.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Table 1.6 Size distribution of film exhibition companies, 2014

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	10	4.7	1,173,965	92.0
1,000 – 4,999	35	16.3	60,402	4.7
500 – 999	25	11.6	19,290	1.5
250 – 499	30	14.0	10,806	0.8
100 – 249	50	23.3	7,939	0.6
50 – 99	30	14.0	2,092	0.2
0 – 49	35	16.3	1,072	0.1
Total	**215**	**100.0**	**1,275,566**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2014.
Percentages may not sum to 100 due to rounding.

NATIONAL/REGIONAL DISTRIBUTION OF FILM COMPANIES IN THE UK

Tables 1.7 and 1.8 show the national/regional distribution of film companies and film company turnover in 2014. Overall, 69% of film companies were concentrated in London and the South East, and over 80% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (59% of companies and 96% of turnover) but the exhibition sector was more widely spread across the UK, with 74% of companies and 42% of turnover associated with companies based outside London.

While London and the South East dominate in production and post-production, there are significant regional centres, particularly in the East of England, the South West and the North West.

Table 1.7 National/regional distribution of film companies, 2014

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
London	3,460	56.8	1,250	50.7	240	59.3	55	25.6	5,005	54.6
South East	960	15.8	470	19.1	80	19.8	35	16.3	1,545	16.8
East of England	380	6.2	160	6.5	30	7.4	15	7.0	585	6.4
South West	320	5.3	160	6.5	15	3.7	20	9.3	515	5.6
North West	195	3.2	95	3.9	10	2.5	15	7.0	315	3.4
Scotland	155	2.5	75	3.0	5	1.2	15	7.0	250	2.7
Yorkshire and The Humber	165	2.7	55	2.2	5	1.2	15	7.0	240	2.6
West Midlands	130	2.1	65	2.6	10	2.5	5	2.3	210	2.3
Wales	115	1.9	45	1.8	5	1.2	10	4.7	175	1.9
East Midlands	95	1.6	45	1.8	5	1.2	10	4.7	155	1.7
North East	65	1.1	25	1.0	0	0.0	5	2.3	95	1.0
Northern Ireland	50	0.8	20	0.8	0	0.0	15	7.0	85	0.9
Total UK	**6,090**	**100.0**	**2,465**	**100.0**	**405**	**100.0**	**215**	**100.0**	**9,175**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2014.
Percentages may not sum to 100 due to rounding.

Table 1.8 National/regional distribution of film company turnover, 2014

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%
London	2,313,685	78.0	1,144,048	82.3	2,862,673	96.2	740,456	58.0	7,060,862	82.0
South East	215,762	7.3	103,450	7.4	c	c	7,917	0.6	c	c
East of England	77,629	2.6	31,971	2.3	40,128	1.3	8,966	0.7	158,694	1.8
South West	116,842	3.9	33,247	2.4	c	c	19,802	1.6	c	c
North West	53,385	1.8	c	c	2,782	0.1	c	c	c	c
Wales	28,096	0.9	10,693	0.8	c	c	c	c	c	c
Scotland	43,169	1.5	8,835	0.6	c	c	c	c	c	c
Yorkshire and The Humber	13,740	0.5	6,944	0.5	1,892	0.1	c	c	c	c
East Midlands	56,845	1.9	c	c	c	c	c	c	c	c
Northern Ireland	14,586	0.5	c	c	c	c	c	c	c	c
West Midlands	12,124	0.4	3,200	0.2	c	c	c	c	c	c
North East	22,229	0.7	c	c	c	c	32,922	2.6	c	c
Total UK	**2,968,092**	**100.0**	**1,389,338**	**100.0**	**2,976,370**	**100.0**	**1,275,566**	**100.0**	**8,609,366**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2014.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
The geographic distribution of turnover is given by the location of the company, not its local units, so a London concentration may be overstated for companies such as cinema chains that have local units around the UK.
The overall total differs from that in Table 1.3 as it excludes figures for video production and distribution.
Percentages may not sum to 100 due to rounding.

LEADING FILM PRODUCTION COMPANIES IN THE UK

Drawing on the BFI Research and Statistics Unit's production database and public information, Table 1.9 presents the production companies involved in the most productions in the UK over the three-year period 2012 to 2014. Working Title Films came top of the list with 14 films with a combined budget of £289 million (equivalent to a mean budget per film of £21 million), followed by Press On Features with 12 films (combined budget of £13 million) and Passion Pictures also with 12 films (combined budget of £12 million). Scott Free Films produced nine films, but had the second largest combined budget at £254 million.

Table 1.9 Top 20 production companies involved in UK production, ranked by number of films, 2012-2014

Production company	Number of films	Estimated combined budget (£ million)	Selected titles
Working Title Films	14	289	Everest; Les Misérables; The Theory of Everything
Press On Features*	12	13	Essex Boys Retribution; The Hooligan Wars; Shame the Devil
Passion Pictures	12	12	The Green Prince; I Am Ali; Listen to Me Marlon
Vertigo Films	11	41	All Stars; Pudsey the Dog: The Movie; Walking on Sunshine
Scott Free Films	9	254	Before I Go to Sleep; Exodus: Gods and Kings; Get Santa
Pinewood Pictures	9	39	Pressure; Robot Overlords; Take Down
North Bank Entertainment	9	<1	The Last House on Cemetery Lane; Theatre of Fear aka The Midnight Horror Show; Valley of the Witch
The Fyzz Facility	7	10	Legendary: Tomb of the Dragon; The Survivalist; X Moor
Met Film Production	7	4	The Great Hip Hop Hoax; How to Change the World; Pantomime
Templeheart Films	7	3	AB Negative; Deadly Virtues: Love.Honor.Obey.; Ibiza Undead
Revolution Films	6	42	The Face of an Angel; Rush; The Trip to Italy
Altitude Film Entertainment	6	11	Big Game; Kill Your Friends; Tiger House
Richwater Films	6	2	Age of Kill; Top Dog; We Still Kill the Old Way
Potboiler Productions	5	52	A Little Chaos; A Most Wanted Man; Our Kind of Traitor
Matador Pictures	5	26	Generation Z; Jimi: All Is By My Side; The Numbers Station
Baby Cow Films	5	20	The Look of Love; Northern Soul; Philomena
Green Screen Productions	5	13	Awaiting; The Knife That Killed Me; Slapper and Me
Film & Music Entertainment	5	4	Lost in Karastan; Rio 50 Degrees; StreetKids United II – The Girls From Rio
New Black Films	5	2	The Battle of the Sexes; Mandela's Children; Shooting for Socrates
Third Films	5	2	6 Desires: DH Lawrence and Sardinia; Blood Cells; Bypass
Chata Pictures	5	1	The Fall of the Essex Boys; Riot; White Collar Hooligan 2: England Away
Dartmouth Films	5	1	Basically, Johnny Moped; The Spirit Level; Still the Enemy Within
Roast Beef Productions	5	1	The Do Gooders; Pussy Riot – A Punk Prayer aka Show Trial: The Story of Pussy Riot; The Russian Woodpecker

Source: BFI
Notes:
* Press On Features entered administration in 2014.
Companies ranked by number of films produced, then by estimated combined budget.
'Estimated combined budget' is the sum of the estimated budgets of all the films associated with the named company. It is not a measure of that company's contribution to the budget. Most films had a number of production companies associated with them and funding came from a variety of sources including National Lottery funding, UK film tax relief, equity investment, US studio investment, distributor minimum guarantees and television pre-sales.
The table includes companies associated with five or more films over the three-year period.

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