Statistical Yearbook

2012

Welcome to the 2012 BFI Statistical Yearbook. This Yearbook is a rich source of industry data and analysis on film in the UK. This publication is one of the ways we deliver on our commitment to evidence-based policy for film. We hope you enjoy this Yearbook and find it useful.

Contents

The BFI is the lead organisation for film in the UK. Founded in 1933, it is a registered charity governed by Royal Charter. In 2011 it was given additional responsibilities, becoming a Government arm's-length body and distributor of Lottery funds for film, widening its strategic focus.

The BFI now combines a cultural, creative and industrial role. The role brings together activities including the BFI National Archive and distribution, its cultural programmes, publishing and festivals with Lottery investment for film production, distribution, education, audience development and market intelligence and research.

The BFI Board of Governors is chaired by Greg Dyke.

We want to ensure that there are no barriers to accessing our publications. If you, or someone you know, would like a large print version of this report, please contact:

Research and Statistics Unit
British Film Institute
21 Stephen Street
London W1T 1LN

Email: rsu@bfi.org.uk
T +44 (0)20 7173 3248
www.bfi.org.uk

The British Film Institute is registered in England as a charity, number 287780.

Registered address:
21 Stephen Street
London W1T 1LN

Chief Executive's foreword

The publication of this tenth annual Statistical Yearbook marks a particularly strong year for British film. As well as the extraordinary performance of the last of the Harry Potter films, 2011 was also marked by great success in the independent sector with *The King's Speech* and *The Inbetweeners Movie* contributing to a record market share for British independent films. But if we were to try to define the year in terms of performance, a good place to start would be to look at how UK film has fared internationally and the strength and success of British talent and creativity abroad.

UK films earned 17% of the $33 billion worldwide gross box office last year while, in 2010 the UK film industry generated a valuable trade surplus for the British economy amounting to over £1.5 billion. Quite justly, UK talent has been feted at all the key festivals such as Sundance, Toronto, and Cannes, and recognised in the awards season, all of which has helped promote British culture, skills and creativity abroad.

Virtually all screens in the UK are expected to be digital by the end of next year and whilst we are yet to see the uptake of VoD grow significantly as a platform for reaching audiences, it remains a priority technology for us to prepare for.

The BFI's five-year plan reflects the importance of boosting audience choice, particularly in the areas of digital platforms and investment in our skills base and filmmaking talent. We want to make sure that Britain remains a leading centre for creative excellence, that worldwide appreciation and demand for that talent remains high and that we grow the success of British film at the UK and international box office.

The Government wholly endorses Chris Smith's acknowledgement in his review of film of the importance of a strong evidence base in policy making. I am personally delighted that we are also able to make the firm commitment in our five-year plan to continue to fund the essential BFI Research and Statistics Unit that for the past 10 years has produced this vital report and many others. Having the up to date 'facts and stats' intelligently aggregated at our fingertips enables decisions to be made for the future and they are a critical component to further grow this vibrant industry.

Amanda Nevill
Chief Executive

UK films' share
of the global box office

17%

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

2011 – the year in review

UK films enjoyed significant commercial and critical success in 2011, no more so than at home, where British films took the first four places at the UK box office. It was an exceptional year for independent UK films with *The King's Speech* grossing a record £45.7 million at the UK box office, $414 million worldwide, four Academy Awards® and seven BAFTA film awards. The second highest grossing independent film of all time, *The Inbetweeners Movie*, earned £45 million in the UK and together with a range of films such as *Horrid Henry: The Movie*, *Jane Eyre*, *My Week with Marilyn* and *Tinker, Tailor, Soldier, Spy* appealed to a wide range of audiences and helped push independent UK films market share to its highest level since RSU records began.

The highest grossing film of the year was the final instalment of the Harry Potter series, *Harry Potter and the Deathly Hallows: Part 2*, which earned £73 million in the UK and over $1.3 billion worldwide. As the most successful film series of all time, Harry Potter has dominated the global film industry for a decade. Based on UK source material, shot in the UK with British cast and crew and produced by a UK company with finance from Warner Bros, the series has grossed £442 million at the UK box office ($7.7 billion at the worldwide box office), sold over 30 million copies on all video formats in the UK and has been watched over 212 million times on UK television.

The investment in the Harry Potter films has had positive effects beyond the franchise itself. Warner Bros has secured the future of Leavesden as a permanent studio facility and boosted the UK's tourism offer with a Harry Potter experience, while the impact of the series on the UK film industry's skills base and infrastructure has been significant. In particular it was a major factor in the development of the UK's visual effects sector into a world-class hub while the films themselves continue to act as the sector's best advert.

The final Harry Potter film was one of 47 3D films released in 2011, up from 28 in 2010, but 3D takings were down from 24% to 20% of UK and Republic of Ireland box office revenues. Evidence suggests that audiences are becoming more discerning about the films they watch in 3D, choosing the format where the effect makes a real contribution to their viewing experience.

The use of 3D was particularly memorable in three feature documentaries during the year including the UK independent film *TT3D: Closer to the Edge*, which grossed over £1.2 million at the UK box office, and the foreign language documentaries *Pina* and *Cave of Forgotten Dreams*. Overall, 2011 was a record year for UK documentaries with *Senna* breaking the box office record set by *Touching the Void* in 2003 with takings of £3.2 milllion.

The UK remains the third largest consumer market for film (by value) in the world, worth £4 billion or 7% of global revenues. Within that market, cinema-going remains robust but the decline in revenues from physical video sales represents a major challenge for the industry.

Television is still the dominant platform in terms of watching films, with over three quarters (77%) of all viewings in 2011. Although technologies, pricing strategies and larger catalogues have improved access to a wider range of on demand content through a variety of platforms and services, the VoD market is still only a small component of the film value chain and lack of detailed data on numbers of viewings makes it difficult to assess the impact.

The significance of the film industry to the UK economy was highlighted in the recent international trade figures published by the Office for National Statistics. The UK film industry exported £2.1 billion worth of services in 2010, made up of £1.57 billion in royalties and £541 million in film production services, resulting in a healthy trade surplus of over £1.5 billion. Total UK production activity in 2011 was a record £1.27 billion, with the UK spend associated with inward investment features exceeding £1.1 billion, also the highest yet recorded.

UK box office

£1bn

UK films' share of the UK box office

36%

While a small number of large budget films are responsible for the majority of UK production value, most domestic films produced in the UK are low and micro-budget features. Of the 200 UK domestic features made in 2011, 62% were produced with budgets of less than £500,000. Our research shows that in recent years less than 14% of UK films at this budget level secured a theatrical release within two years of principal photography but of the remainder, 58% do get shown on other platforms.

Opening our eyes, the 2011 BFI study on the cultural contribution of film in the UK, demonstrated the potency of film culture in the UK and the power of film to act as a window on the world. The survey showed that film occupies a high position in people's leisure time and interests (84% of people said they were interested in film). Furthermore, 74% said that films can be a good way of making people think about difficult or sensitive issues and two thirds of people had seen films they found educational or which gave them insight into other cultures. When asked about significant films, many mainstream popular films were identified as having had profound effects on people. The survey also illustrated the importance of film as a versatile medium for exploring a range of subjects in formal and informal education settings, and once again this Yearbook provides a comprehensive overview of film education statistics.

This is the tenth edition of the Statistical Yearbook, and the RSU has now built up a decade's worth of trend analysis for most areas of the industry. In that time, there have been major shifts in the production and consumption of feature films in the UK, with each sector of the industry having to respond to the transition from analogue to digital. The scale of the transformation within the industry becomes clear when we compare a few key metrics from 2002 with the 2011 data.

In 2002, 369 films were released in UK cinemas, compared to 558 in 2011 (a 51% increase). Admissions in 2002 were at a 30-year high of 176 million generating a box office gross of £755 million (while admissions remained on a plateau for a decade the total gross box office for 2011 exceeded £1 billion). The top UK film as reported in that first Statistical Yearbook was *Harry Potter and the Chamber of Secrets* while *Gosford Park* and *Bend it Like Beckham* lifted UK independent share to 6.5% (half the total recorded last year). As in 2011, the UK's favourite genre was comedy (27% of box office from 23% releases) but UK audiences were less likely to visit cinemas on a weekday – 68% of the gross box office in 2002 was generated on a weekend compared with 58% in 2011. The share of films from Europe, India and the rest of the world amounted to just 2% of the gross box office (3.7% in 2011) and foreign language films made up 36% of releases but only 2% of the box office (in 2011, there were fewer foreign language films as a share of releases and the box office share remained the same). While some things have changed little in 10 years, the infrastructure and delivery platforms have altered radically.

In 2002, there were 3,258 cinema screens in the UK but only four of those screens were digital (out of 113 in the world). In home entertainment, DVD players were in a quarter of UK households and a significant number of VHS tapes were still being sold. On demand services were limited to near Video on Demand pay-per-view offers on satellite and cable. Multi-channel television accounted for 22% of the UK television audience and 59% of the population owned a mobile phone.

So what of the future? With broadband speeds increasing, smartphone and tablet ownership on the rise and internet-enabled television sets becoming more commonplace the period of digital transition is by no means complete. The ways in which we choose and watch films has undergone an enormous change in the last decade and the next one is likely to be no different.

For the BFI, the challenge will be to accurately measure those shifts and to ensure the vast amounts of data generated in the new digital world are accessible and analysed in a robust and effective way and made available for the benefit of all film stakeholders.

We hope you find this Yearbook a useful source of information and we welcome your feedback (rsu@bfi.org.uk).

Sean Perkins
Head of Research and Statistics Unit

Nick Maine
Research Manager

2010 UK film trade surplus

£1.5bn

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 1:

The box office

UK box office receipts achieved record levels in 2011. For the first time revenues exceeded £1 billion in a calendar year, helped by strong performances from UK independent films, whose share of the box office was the highest since records began.

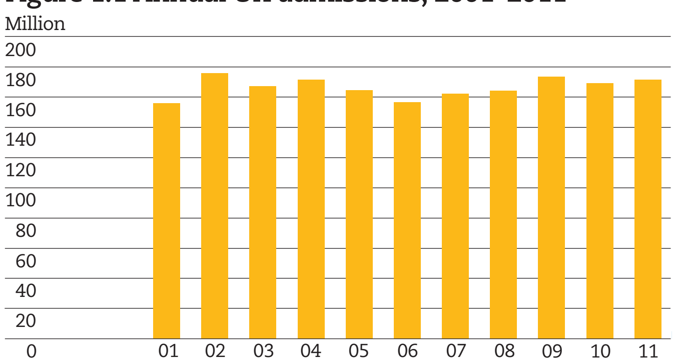
Facts in focus:

- UK cinema admissions reached 171.6 million, up 1.4% on 2010.
- Box office receipts were £1,040 million, up 5% on 2010.
- 558 films were released for a week or more in the UK and Republic of Ireland.
- UK films, including co-productions, accounted for 23% of releases and 36% of the market by value.
- The top 100 films earned 91% of the gross box office.
- 47 3D films were released in 2011, up from 28 in 2010, but their 3D takings accounted for 20% of UK and Republic of Ireland box office revenues, down from 24% in 2010.

1.1 Admissions

Over 171 million cinema tickets were sold in the UK in 2011, which was a 1.4% increase on the 2010 admissions figure. The 2011 figure was the third highest total of the last decade and maintains the plateau in admissions which has been apparent since 2002 (Figure 1.1). It was a mixed picture across other major international territories – admissions were also up in France (4.5%), Germany (2.4%) and Russia (3.9%) but decreased in the USA (–4.4%), Italy (–7.9%) and Spain (–2.2%).

Figure 1.1 Annual UK admissions, 2001–2011



Source: CAA, Rentrak.

Year	Total admissions (million)
2001	155.9
2002	175.9
2003	167.3
2004	171.3
2005	164.7
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6

Source: CAA, Rentrak.

The success of *The King's Speech* and other awards season contenders such as *Black Swan* contributed to an increase in admissions in January 2011 compared with the same month in 2010 (Table 1.1). The sustained appeal of the royal biopic, however, had the greatest impact the following month: it was February's top performing title and helped to boost the month's admissions by 16% compared with 2010. The sharpest drops in attendances were recorded in March and April when admissions fell by 24% compared to the same months in 2010, partly due to the lack of a breakout hit such as 2010's *Alice in Wonderland* and unseasonably warm weather in April 2011.

In May, the release of *Pirates of the Caribbean: On Stranger Tides* and *The Hangover Part II* contributed to a 4% increase in ticket sales compared with 2010, but the month with the biggest year-on-year increase in admissions was June. A strong slate of releases, including *Bridesmaids* and *X-Men: First Class*, meant that admissions increased by 45% on 2010, when cinema-going had been adversely affected by the FIFA World Cup. Even though the highest grossing film of the year, *Harry Potter and the Deathly Hallows: Part 2*, was released in the middle of July, admissions in this month were 12% down on 2010, but it did contribute to an increase in ticket sales in August compared with the previous year. August also saw the release of the second big independent hit of the year, *The Inbetweeners Movie*, which together with *Tinker, Tailor, Soldier, Spy* went on to boost admissions in September, which were up 14% compared with 2010.

The end of the year saw the release of a number of family films, such as *Alvin and the Chipmunks: Chipwrecked*, *Arthur Christmas*, *Happy Feet 2* and *Puss in Boots*, as well as the fourth Twilight film, *The Twilight Saga: Breaking Dawn – Part 1*, and the year finished with a 12% improvement in admissions compared with the snow-blighted December 2010.

Table 1.1 Monthly UK cinema admissions, 2010–2011

Month	2010 (million)	2011 (million)	% +/– on 2010
January	14.6	15.2	+4.3
February	14.9	17.2	+15.8
March	14.5	11.1	–23.6
April	14.7	11.2	–23.8
May	12.8	13.3	+4.0
June	8.7	12.7	+45.5
July	20.3	17.8	–12.2
August	20.2	21.4	+5.9
September	10.1	11.5	+14.0
October	12.9	13.6	+5.2
November	13.5	12.9	–3.8
December	12.2	13.6	+12.0
Total	**169.2**	**171.6**	**+1.4**

Source: CAA, Rentrak.

Note: Figures may not sum to totals due to rounding.

*Image: **The Inbetweeners Movie** courtesy of Entertainment Film Distributors*

Average weekly admissions ranged from 2.5 million in March to 4.8 million in August (Table 1.2). Because of the low cinema attendances in June 2010 due to the FIFA World Cup, the largest increase in weekly admissions occurred in June, while March and April saw the largest year-on-year decreases, down from 2010's 3.3 and 3.4 million to 2.5 and 2.6 million respectively.

Table 1.2 Average weekly admissions, 2010–2011

Month	2010 weekly average (million)	2011 weekly average (million)
January	3.3	3.4
February	3.7	4.3
March	3.3	2.5
April	3.4	2.6
May	2.9	3.0
June	2.0	3.0
July	4.6	4.0
August	4.6	4.8
September	2.4	2.7
October	2.9	3.1
November	3.1	3.0
December	2.8	3.1

Source: CAA, Rentrak.

Table 1.3 shows how the 2011 admissions breakdown by ISBA TV region, with London accounting for a quarter of UK admissions (25%). The pattern of national and regional admissions has remained largely unchanged over the last decade.

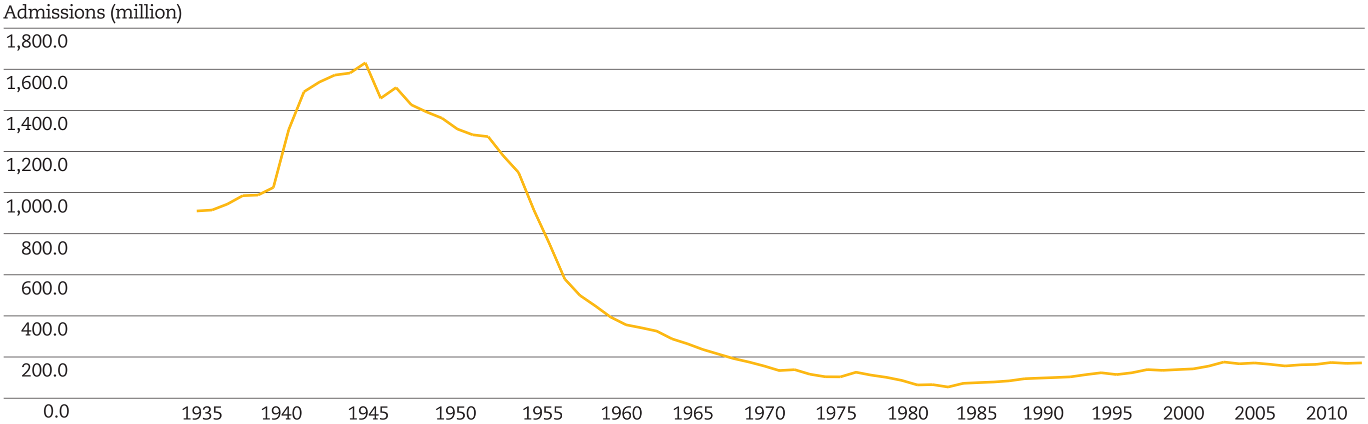
Table 1.3 Cinema admissions by region, 2011

Region	Admissions (million)	%
London	42.6	24.9
Midlands	23.9	13.9
Lancashire	17.5	10.2
Southern	16.0	9.3
Yorkshire	14.2	8.3
Wales and West	12.1	7.1
Central Scotland	12.0	7.0
East of England	11.5	6.7
North East	6.6	3.8
Northern Ireland	5.9	3.4
South West	4.2	2.4
Northern Scotland	3.7	2.2
Border	1.4	0.8
Total	**171.6**	**100.0**

Source: CAA, Rentrak.

Figure 1.2 puts UK admissions in a longer term perspective. Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as incomes rose and new leisure activities became available. The largest competition, of course, came from the growth of television which allowed audiences to satisfy their appetite for screen entertainment in the comfort of their own homes. As cinema admissions fell so did the supply of screens which led to further falling demand and more cinema closures. By the 1980s the number and quality of the remaining cinemas were at an all time low. The introduction of the VCR in the same decade had a further negative impact on admissions and the nadir was reached in 1984 with cinema-going levels down to an average of one visit per person per year. However, the introduction of multiplex cinemas to the UK from 1985 onwards reversed the trend and ushered in a new period of growth which saw admissions returning to levels last seen in the early 1970s. Admissions in 2011 were the third highest in the past 40 years.

Figure 1.2 Annual UK admissions, 1935–2011



	1935	1940	1945	1950	1955	1960	1965	1970	1975	1980	1985	1990	1995	2000	2005	2010
Admissions	912.3	1,027.0	1,585.0	1,395.8	1,181.8	500.8	326.6	193.0	116.3	101.0	72.0	97.4	114.6	142.5	164.7	169.2

Source: BFI, CAA, Rentrak.

Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)
1935	912.3	1946	1,635.0	1957	915.2	1968	237.3	1979	111.9	1990	97.4	2001	155.9
1936	917.0	1947	1,462.0	1958	754.7	1969	214.9	1980	101.0	1991	100.3	2002	175.9
1937	946.0	1948	1,514.0	1959	581.0	1970	193.0	1981	86.0	1992	103.6	2003	167.3
1938	987.0	1949	1,430.0	1960	500.8	1971	176.0	1982	64.0	1993	114.4	2004	171.3
1939	990.0	1950	1,395.8	1961	449.1	1972	156.6	1983	65.7	1994	123.5	2005	164.7
1940	1,027.0	1951	1,365.0	1962	395.0	1973	134.2	1984	54.0	1995	114.6	2006	156.6
1941	1,309.0	1952	1,312.1	1963	357.2	1974	138.5	1985	72.0	1996	123.5	2007	162.4
1942	1,494.0	1953	1,284.5	1964	342.8	1975	116.3	1986	75.5	1997	138.9	2008	164.2
1943	1,541.0	1954	1,275.8	1965	326.6	1976	103.9	1987	78.5	1998	135.2	2009	173.5
1944	1,575.0	1955	1,181.8	1966	288.8	1977	103.5	1988	84.0	1999	139.1	2010	169.2
1945	1,585.0	1956	1,100.8	1967	264.8	1978	126.1	1989	94.5	2000	142.5	2011	171.6

1.2 Box office earnings

According to CAA/Rentrak, the total UK box office for 2011 was £1,040 million, up 5% on 2010. This figure covers all box office earnings during the calendar year 2011 for films exhibited in the UK whose box office takings were tracked by Rentrak. The trends in box office takings from 2001 are shown in Table 1.4 and indicate growth of 61% in the period.

Table 1.4 UK box office trends, 2001–2011

Year	Box office gross (£ million)	%+/–	Cumulative %
2001	645	–	–
2002	755	17.0	17.0
2003	742	–1.7	15.0
2004	770	3.8	19.4
2005	770	0.0	19.4
2006	762	–1.0	18.1
2007	821	7.7	27.3
2008	850	3.5	31.8
2009	944	11.1	46.4
2010	988	4.7	53.2
2011	1,040	5.3	61.2

Source: CAA, Rentrak.

1.3 Film releases and box office revenues

In the UK and Republic of Ireland in 2011, 558 films were released for a week or more, one more than in 2010. They generated £1,135 million in box office revenues, an increase of 11% on 2010. This figure differs from the £1,040 million in paragraph 1.2 because it includes revenues generated in 2012 by films released in 2011 and covers the Republic of Ireland as well as the UK, which distributors usually treat as a single distribution territory. The subsequent analysis in this chapter includes all titles released in 2011 and includes revenue generated in 2012 up to 12 February 2012.

As can be seen in Table 1.5, the top 100 films took 91% of the box office, a slight increase on 2010's figure. The remaining 458 films (82% of all releases) accounted for just 9% of gross revenues. A total of 47 films were released in the 3D format, up from 28 releases in 2010. However, although there were more 3D releases, 3D takings in 2011 (£230.9 million) accounted for 20% of the total box office, down from 24% in 2010.

Table 1.5 Summary of results at the UK and Republic of Ireland box office, 2007–2011

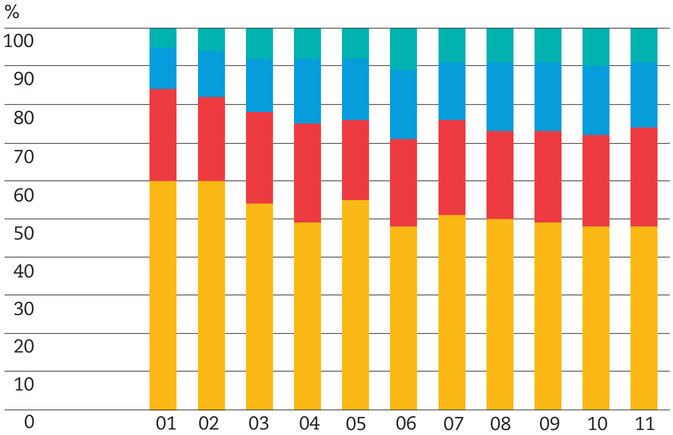
	2007	2008	2009	2010	2011
Releases	516	527	503	557	558
Combined gross (£ million)	933.8	934.5	1,126.7	1,023.6	1,134.5
Top 20 films (% of box office)	51.2	49.6	48.6	48.2	47.5
Top 50 films (% of box office)	75.7	72.4	72.9	71.9	73.7
Top 100 films (% of box office)	91.0	90.3	91.1	89.7	90.7

Source: Rentrak, BFI RSU analysis.

Note: Table 1.5 and all subsequent analysis of the theatrical market includes all titles released in 2011. The combined gross reflects the territorial gross (ie including the Republic of Ireland), and includes those titles released in 2011 but also making money into 2012, up to and including 12 February 2012.

Figure 1.3 shows that the box office share of the top grossing 50 films fell from 84% in 2001 to 74% in 2011. This reflects the increasing number of releases and a range of strong performances from specialised and domestic films as well as some fairly high earning studio-backed films which are not in the top 50.
In 2011, the 50th highest earning film at the box office was *Immortals*, which earned more than £6 million. The next 15 films in the rankings (including UK films such as *Hugo* and *Jane Eyre* and studio films such as *The Adjustment Bureau*, *Diary of a Wimpy Kid: Rodrick Rules* and *Source Code*) all earned more than £5 million, and another 70 films all earned more than £1 million.

Figure 1.3 Market share of top 20, top 21–50, top 51–100 and rest of films, 2001–2011

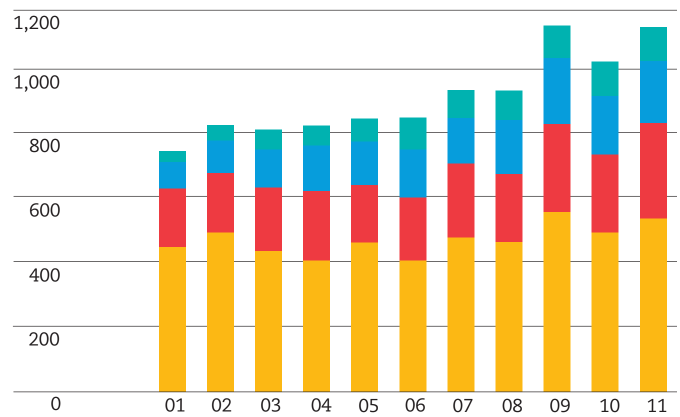


	01	02	03	04	05	06	07	08	09	10	11
% share of rest	4	6	8	8	9	12	9	10	9	10	9
% share of top 51–100	11	12	14	17	16	18	15	18	18	18	17
% share of top 21–50	24	22	24	26	21	23	25	23	24	24	26
% share of top 20	60	60	54	49	55	48	51	50	49	48	48

Source: Rentrak, BFI RSU analysis.

Note: Percentages may not sum to 100 due to rounding.

Figure 1.4 Gross box office of top 20, top 21–50, top 51–100 and rest of films, 2001–2011



	01	02	03	04	05	06	07	08	09	10	11
Gross box office of rest	33	47	63	62	72	98	86	91	101	106	106
Gross box office of top 51–100	84	101	118	141	135	150	142	168	206	182	193
Gross box office of top 21–50	181	186	197	216	179	196	230	213	274	243	297
Gross box office of top 20	450	495	438	409	464	408	480	465	559	495	539

Source: Rentrak, BFI RSU analysis.

Figure 1.4 depicts the increase in box office revenue over the last 11 years. The top 20 film releases of 2011 earned £539 million, up 20% since 2001, while those ranked 21–50 earned £297 million in 2011, up 64% since 2001, and those ranked 51–100 earned £193 million, up 129% since 2001. The 2009 figure includes all revenues for *Avatar,* which was released in December 2009 but made 71% of its total gross earnings in 2010.

The number of films released in the UK in 2011 by the number of sites at the widest point of release (WPR) is outlined in Table 1.6. A total of 187 films were released at 100 sites or more (34%), while 193 films were released on fewer than 10 sites (35% of all films released). Just under two thirds of all films released in the UK went out on 99 prints or fewer.

Table 1.6 Number of releases and median box office gross by number of sites at widest point of release, 2011

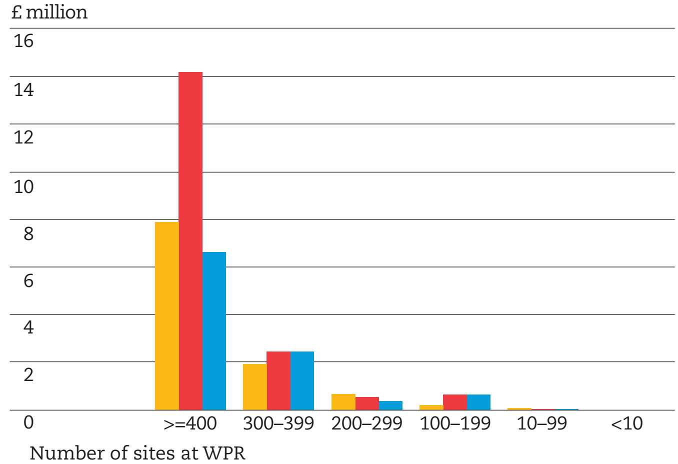
Number of sites at WPR	Number	% of releases	Median box office (£)
>=500	19	3.4	20,475,000
400 – 499	57	10.2	6,059,000
300 – 399	44	7.9	1,937,000
200 – 299	26	4.7	686,000
100 – 199	41	7.3	223,000
10 – 99	178	31.9	99,000
<10	193	34.6	5,000
Total	**558**	**100.0**	**76,000**

Source: Rentrak, BFI RSU analysis.

Note: Median box office rounded to nearest £1,000.

Figure 1.5 shows the median box office by number of sites at widest point of release for all films, UK films and UK independent films. The median for UK films is higher than for the other two categories for films which were released at 400 or more sites. The UK films which achieve a wide release are mainly higher budget UK films made in co-operation with the major studios, and which tend to be successful at the box office. Films in this category in 2011 included *Harry Potter and the Deathly Hallows: Part 2*, *Pirates of the Caribbean: On Stranger Tides* and *Sherlock Holmes: A Game of Shadows*. Also, in 2011, there were some very successful independent UK films, such as *The Inbetweeners Movie*, *The King's Speech* and *Tinker, Tailor, Soldier, Spy*, which benefited from wide releases. In the other WPR bands the median values of box office takings were similar for all categories.

Figure 1.5 Median box office gross by number of sites at widest point of release for all films, UK films and UK independent films, 2011



	>=400	300–399	200–299	100–199	10–99	<10
All films	7.89	1.94	0.69	0.22	0.10	0.01
UK films	14.17	2.47	0.56	0.67	0.05	<0.01
UK independent films	6.62	2.47	0.38	0.67	0.05	<0.01

Source: BFI, RSU.

1.4 Country of origin of film releases

As Table 1.7 indicates, 38% of all films released in the UK in 2011 were of USA origin (excluding UK co-productions) and these films accounted for 60% total box office earnings (down from 72% in 2010).

UK films, including co-productions, represented 23% of releases (up from 21% in 2010) and shared 36% of the box office, of which UK independent films earned 13% and UK studio-backed titles 23%. The box office share for UK independent films was the highest since comprehensive box office records began.

Films whose country of origin lies outside the UK and USA accounted for 39% of releases (down slightly from 41% in 2010) but only 3.7% of earnings (down from 4.2% in 2010). European films represented 17.7% of all releases and 1.7% of revenues while films from India accounted for 1% of the box office from 12.9% of the releases. Films from the rest of the world also accounted for 1% of the box office gross, but from 8.6% of releases.

Table 1.7 Country of origin of films released in the UK and Republic of Ireland, 2011

Country of origin	No. of releases in 2011	% of all releases	2011 box office (£ million)	2011 box office share (%)
USA	212	38.0	682.3	60.1
UK independent films	110	19.7	150.8	13.3
UK studio-backed films*	17	3.0	259.3	22.9
All UK	127	22.8	410.1	36.2
Europe	99	17.7	19.5	1.7
India	72	12.9	11.1	1.0
Rest of the world	48	8.6	11.5	1.0
Total	**558**	**100.0**	**1,134.5**	**100.0**

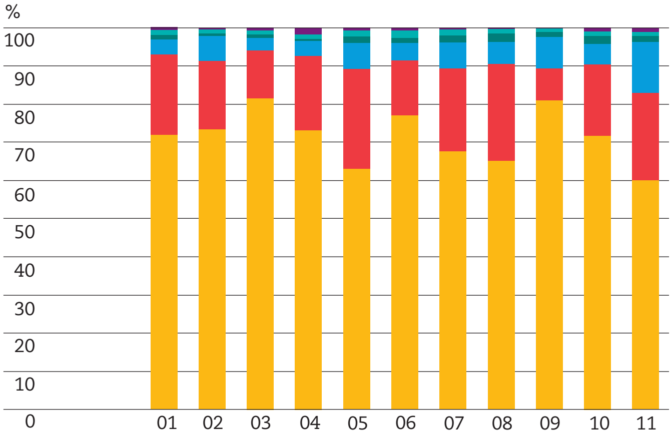
Source: Rentrak, BFI RSU analysis.

Notes:
Box office gross = cumulative total up to 12 February 2012.
* 'Studio-backed' means backed by one of the major US film studios.
Sub-totals may not sum to totals due to rounding.

The changes in market share over time by country of origin of films are shown in Figure 1.6. The share of USA and UK studio-backed films over the last 11 years had remained at around the 90% level up to 2010, but in 2011 this share dropped to 83%, with the share for USA only films (60%) being the lowest for the period. The main reason for the low share for USA and UK studio-backed films in 2011 was the increased share for UK independent films which, at over 13%, was at its highest level since our records began.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 1.6 Market share by country of origin, 2001–2011

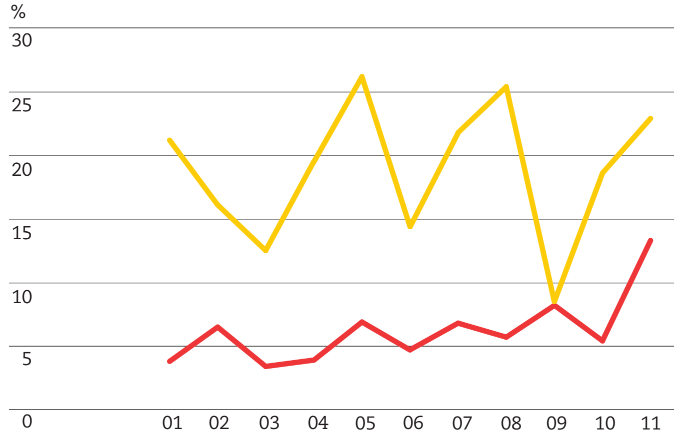


	01	02	03	04	05	06	07	08	09	10	11
Rest of the world	0.5	0.5	0.8	1.8	0.8	0.7	0.5	0.3	0.2	0.8	1.0
India	1.2	1.0	1.0	1.1	1.5	1.8	1.6	1.4	1.0	1.3	1.0
Europe	1.3	0.7	0.9	0.6	1.6	1.2	1.8	2.3	1.2	2.1	1.7
UK independent	3.8	6.5	3.4	3.9	6.9	4.7	6.8	5.7	8.2	5.4	13.3
UK studio-backed	21.2	16.1	12.5	19.5	26.2	14.4	21.8	25.4	8.5	18.6	22.9
USA	72.0	73.4	81.6	73.2	63.1	77.1	67.7	65.2	81.0	71.8	60.1

Source: BFI, RSU.

The fluctuating pattern of UK market share is underlined in Figure 1.7 with the annual figure dependent on a small number of high grossing titles. The average UK independent market share for the 11-year period was 6% with a visible upward trend from the low of 3.4% in 2003.

Figure 1.7 UK films' share of the UK theatrical market, 2001–2011



	01	02	03	04	05	06	07	08	09	10	11
Market share of UK films produced with US studio backing	21.2	16.1	12.5	19.5	26.2	14.4	21.8	25.4	8.5	18.6	22.9
Market share of UK independent films	3.8	6.5	3.4	3.9	6.9	4.7	6.8	5.7	8.2	5.4	13.3

Source: BFI, RSU.

Table 1.8 compares the number of UK and non-UK films released in the UK in 2011 across several gross box office bands. There were twice as many UK films in the over £30 million gross category compared with non-UK films thanks to the success of *Harry Potter and the Deathly Hallows: Part 2, The Inbetweeners Movie, The King's Speech* and *Pirates of the Caribbean: On Stranger Tides*. There were three UK films in the second box office band (*Arthur Christmas, Johnny English Reborn* and *Sherlock Holmes: A Game of Shadows*) compared with four non-UK titles, and four UK films in the third box office band compared with 15 non-UK titles.

Overall, UK films made up 34% of films earning over £10 million in 2011, compared with 31% in 2010. The proportion of UK films in the lowest box office band was 55% in 2011, compared with 65% in 2010.

Table 1.8 UK and non-UK releases by box office band, 2011

Box office gross (£ million)	Non-UK releases Number	% releases	UK releases Number	% releases
>=30	2	0.5	4	3.1
20 – 29.99	4	0.9	3	2.4
10 – 19.99	15	3.5	4	3.1
5 – 9.99	27	6.3	6	4.7
1 – 4.99	54	12.5	16	12.6
0.1 – 0.99	104	24.1	24	18.9
<0.1	225	52.2	70	55.1
Total	**431**	**100.0**	**127**	**100.0**

Source: Rentrak, BFI RSU analysis.

Note: Percentages may not sum to 100 due to rounding.

Table 1.9 shows the percentages of UK releases by box office band between 2007–2011. In 2011, 74% of UK films earned less than £1 million at the box office. This is similar to the percentages for 2007 and 2008 but lower than in 2009 and 2010. The four UK films earning £30 million or over in 2011 equate to 3.1% of UK releases, the highest in the five-year period. Two of these films were independent films, and only one other UK independent film has ever earned over £30 million (*Slumdog Millionaire* in 2009). The percentage of UK films earning between £20 and £30 million, at 2.4%, was the highest since 2007, and 8.6% of UK films released in 2011 earned £10 million or more at the box office, the highest percentage over the period shown.

Table 1.9 UK releases by box office band, 2007–2011

Box office gross (£ million)	2007 Number	2007 % releases	2008 Number	2008 % releases	2009 Number	2009 % releases	2010 Number	2010 % releases	2011 Number	2011 % releases
>=30	1	0.9	3	2.7	2	1.8	2	1.7	4	3.1
20 – 29.99	4	3.7	0	0.0	1	0.9	1	0.8	3	2.4
10 – 19.99	4	3.7	2	1.8	0	0.0	6	5.0	4	3.1
5 – 9.99	6	5.5	6	5.4	6	5.3	3	2.5	6	4.7
1 – 4.99	12	11.0	17	15.3	14	12.3	10	8.4	16	12.6
0.1 – 0.99	28	25.7	23	20.7	21	18.4	20	16.8	24	18.9
<0.1	54	49.5	60	54.1	70	61.4	77	64.7	70	55.1
Total	**109**	**100.0**	**111**	**100.0**	**114**	**100.0**	**119**	**100.0**	**127**	**100.0**

Source: Rentrak, BFI RSU analysis.

Note: Percentages may not sum to 100 due to rounding.

- For more information about top films in 2011 see Chapter 2 (page 18)
- For further details of film distribution in 2011 see Chapter 9 (page 86)
- For information about weekend/weekday box office performance see Chapter 9, Table 9.4 (page 89)
- For a review of the exhibition sector in 2011 see Chapter 10 (page 94)

Chapter 2:

Top films in 2011

Home-grown films topped the UK box office in 2011. The year's top title, ***Harry Potter and the Deathly Hallows: Part 2***, became the third highest earning film of all time in the UK, while the next two most popular films, ***The King's Speech*** and ***The Inbetweeners Movie***, became the all time top two highest grossing UK independent films.

Facts in focus:

- The biggest film of the year was ***Harry Potter and the Deathly Hallows: Part 2***, which earned £73 million at the UK box office. It also topped the weekend box office charts for four weeks in 2011.
- The second and third biggest films at the UK box office in 2011 were independent UK films. ***The King's Speech*** and ***The Inbetweeners Movie*** both grossed more than £45 million.
- Eight UK films featured in the top 20.
- The top 20 UK films grossed £376 million, one third of the total UK box office.
- UK films spent 23 weeks at the top of the UK weekend box offices charts.
- The total box office from 3D film screenings for films released in 2011 was £231 million. This is 20% of the total box office (down from 24% in 2010).

2.1 The top 20 films

In 2011, the top film of the year at the UK box office was *Harry Potter and the Deathly Hallows: Part 2*. The eighth and final outing from the boy wizard franchise grossed £73 million to become the third highest grossing film of all time, behind 2009's *Avatar* and 2010's *Toy Story 3*. In second and third places were the two all time highest grossing UK independent films, *The King's Speech* and *The Inbetweeners Movie*. In total, eight UK titles featured in the top 20, six of which, including the last Harry Potter film, were UK/USA collaborations, produced, at least partly, in the UK and mainly financed by inward investment from the major US studios.

Thirteen films earned more than £20 million at the UK box office in 2011, up from nine in 2010 (Table 2.1). Sequels and franchises accounted for nine of the top 20 films, the same number as in 2010. In addition to these, *Rise of the Planet of the Apes*, which is a re-imagining of themes from an old franchise, also appears in the top 20.

Animation, the highest earning genre in the top 20 in the past few years, had the most titles in the list with five entries but their combined box office gross of £90 million was beaten by four comedy films. *Bridesmaids, The Hangover Part II, The Inbetweeners Movie* and *Johnny English Reborn* took more than £120 million between them.

Table 2.1 Box office results for the top 20 films released in the UK and Republic of Ireland, 2011

	Title	Country of origin	Box office gross (£ million)	Number of opening cinemas	Opening weekend gross (£ million)	Distributor
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.09	583	23.77	Warner Bros
2	The King's Speech	UK	45.68	395	3.53	Momentum
3	The Inbetweeners Movie	UK	45.03	455	13.23	Entertainment
4	Pirates of the Caribbean: On Stranger Tides	UK/USA	32.92	569	11.63	Walt Disney
5	The Hangover Part II	USA	32.83	469	10.41	Warner Bros
6	The Twilight Saga: Breaking Dawn – Part 1	USA	30.77	543	13.91	eOne Films
7	Transformers: Dark of the Moon	USA	28.11	521	10.73	Paramount
8	Sherlock Holmes: A Game of Shadows*	UK/USA	26.23	540	3.83	Warner Bros
9	Bridesmaids	USA	23.02	482	3.54	Universal
10	Arthur Christmas*	UK/USA	20.84	460	2.11	Sony Pictures
11	Rise of the Planet of the Apes	USA	20.77	488	5.84	20th Century Fox
12	Johnny English Reborn*	UK/USA	20.63	524	4.97	Universal
13	Tangled	USA	20.47	445	5.11	Walt Disney
14	Fast & Furious 5	USA	18.52	437	5.33	Universal
15	Mission: Impossible – Ghost Protocol*	USA	17.99	509	8.19	Paramount
16	The Smurfs*	USA	17.25	445	3.78	Sony Pictures
17	Kung Fu Panda 2	USA	16.87	514	6.19	Paramount
18	The Adventures of Tintin: The Secret of the Unicorn*	USA/NZ	16.30	512	6.76	Paramount
19	Black Swan	USA	16.19	356	2.76	20th Century Fox
20	Gnomeo & Juliet	UK/USA	15.82	462	2.95	eOne Films

Source: Rentrak, BFI RSU analysis.

Notes:
Box office gross = cumulative total up to 12 February 2012.
Films with an asterisk (*) were still on release on 12 February 2012.

2.2 The top 20 UK films

The top 20 UK films, shown in Table 2.2, had a combined gross of £376 million, which was 33% of the total UK box office. This was up from £232 million in 2010 (23% of gross box office). There were more high earning UK films in 2011 than in 2010 with 11 films taking more than £10 million at the box office compared with nine in 2010. Most of the top 20 UK films were UK/USA collaborations. Seven of the top 20 titles were UK independent films, compared with nine in 2010, but they accounted for 33% of the total box office for the top 20 UK films, compared with 18% in 2010. The top 20 UK films exemplify the diversity of genre of UK film production from the reworked classic *Jane Eyre* to cold war thriller *Tinker, Tailor, Soldier, Spy,* family film *Horrid Henry: The Movie* to *Senna*, the highest ever grossing UK feature documentary.

Table 2.2 Box office results for the top 20 UK films released in the UK and Republic of Ireland, 2011

	Title	Country of origin	Box office gross (£ million)	Distributor
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.09	Warner Bros
2	The King's Speech	UK	45.68	Momentum
3	The Inbetweeners Movie	UK	45.03	Entertainment
4	Pirates of the Caribbean: On Stranger Tides	UK/USA	32.92	Walt Disney
5	Sherlock Holmes: A Game of Shadows*	UK/USA	26.23	Warner Bros
6	Arthur Christmas*	UK/USA	20.84	Sony Pictures
7	Johnny English Reborn*	UK/USA	20.63	Universal
8	Gnomeo & Juliet	UK/USA	15.82	eOne Films
9	X-Men: First Class	UK/USA	15.03	20th Century Fox
10	Paul	UK/USA	14.20	Universal
11	Tinker, Tailor, Soldier, Spy*	UK/Fra	14.18	StudioCanal
12	Captain America: The First Avenger	UK/USA	9.48	Paramount
13	One Day	UK/USA	8.03	Universal
14	127 Hours	UK/USA	7.78	Warner Bros
15	Horrid Henry: The Movie	UK	6.62	Vertigo Films
16	Hugo*	UK/USA	5.27	Entertainment
17	Jane Eyre	UK	5.07	Universal
18	The Three Musketeers	UK/Ger/Fra	3.48	eOne Films
19	Senna	UK/USA	3.17	Universal
20	My Week with Marilyn*	UK/USA	3.11	Entertainment

Source: Rentrak, BFI RSU analysis.

Notes:
Box office gross = cumulative total up to 12 February 2012.
Films with an asterisk (*) were still on release on 12 February 2012.

2.3 The top 20 UK independent films

The top 20 UK independent films, shown in Table 2.3, had a combined gross of £144 million, which was 13% of the total UK box office. Over two thirds of this total was earned by just two releases, *The King's Speech* and *The Inbetweeners Movie*, both of which grossed over £45 million. Again, the top 20 UK independent films encompassed many genres including drama, comedy, romance and thriller. For the first time a documentary appeared in the list of top 20 UK independent films, the story of the Isle of Man's legendary road race – *TT3D: Closer to the Edge*.

Table 2.3 Box office results for the top 20 UK independent films released in the UK and Republic of Ireland, 2011

	Title	Country of origin	Box office gross (£ million)	Distributor
1	The King's Speech	UK	45.68	Momentum
2	The Inbetweeners Movie	UK	45.03	Entertainment
3	Tinker, Tailor, Soldier, Spy*	UK/Fra	14.18	StudioCanal**
4	Horrid Henry: The Movie	UK	6.62	Vertigo Films
5	Jane Eyre	UK	5.07	Universal
6	The Three Musketeers	UK/Ger/Fra	3.48	eOne Films
7	My Week with Marilyn*	UK/USA#	3.11	Entertainment
8	The Eagle	UK/USA#	2.88	Universal
9	West is West	UK	2.69	Icon
10	Attack the Block	UK	2.47	Optimum**
11	We Need to Talk About Kevin*	UK/USA#	2.22	Paramount
12	Anuvahood	UK	2.08	Revolver
13	Chalet Girl	UK	1.83	Paramount
14	Submarine	UK	1.46	Optimum**
15	TT3D: Closer to the Edge	UK	1.26	Cinema NX
16	Brighton Rock	UK	1.04	Optimum**
17	Neds	UK/Fra/Ita	0.97	eOne Films
18	Patiala House	UK/Ind	0.71	B4U Network
19	The Awakening*	UK	0.67	StudioCanal**
20	Blitz	UK	0.62	Lions Gate

Source: Rentrak, BFI RSU analysis.

Notes:
Box office gross = cumulative total up to 12 February 2012.
Films with a single asterisk (*) were still on release on 12 February 2012.
** Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.
# *My Week with Marilyn*, *The Eagle* and *We Need to Talk About Kevin* were made with independent (non-studio) US support.

2.4 The top 3D films

2011 may prove to be the high point for the release of 3D films: 47 titles were released in the format during the year compared with 28 in 2010 and 14 in 2009. The 2011 releases generated £230.9 million, up to 12 February 2012, from their 3D screenings which represents 20% of the UK and Republic of Ireland box office, down from 24% in 2010. (An estimated 33 3D titles will be released in 2012.)

The top 20 3D releases in 2011 are listed in Table 2.4. *Harry Potter and the Deathly Hallows: Part 2* was the highest earning film of the year, and it also appears at the top of the 3D list, even though only 48% of its total gross was taken from 3D screens. (The top earning film in 2010, *Toy Story 3*, generated 72% of its total gross from 3D screenings.) On average the percentage of films' total box office taken in 3D screenings has decreased. Excluding films which were shown only on 3D screens, the median 3D takings as a percentage of total takings fell from 71% in 2010 to 57% in 2011.

However, this does not tell the whole story. If we compare the average takings per screen for 3D screens with the average takings for 2D screens, it provides a measure of the relative popularity of 3D viewings compared with 2D viewings. Looking at the ratio of 3D screen averages to 2D screen averages for a particular film, the higher the value the more popular were its 3D viewings compared with its 2D viewings. Ranking all 2010 and 2011 3D releases (which were shown on both 2D and 3D screens) by this ratio, the top film (*Battle of Warsaw*) and five others of the top 10 films are 2011 releases (Table 2.5). This suggests that audiences may be becoming more discerning about the films they watch in 3D, and chose 3D where the effect makes a real contribution to the experience rather than watching 3D films for the novelty value.

Audience research supports this conclusion. A report (see link at end of chapter) on perceptions of 3D from a study conducted by Ipsos MediaCT in 2011 states that '*As the size of the audience who would opt for the 3D experience remained consistent, those who do buy a 3D ticket are likely to be more familiar and savvy than they once were, expecting a consistently better experience for the circa +£2 price premium they pay*'.

Table 2.4 Top 20 3D releases in the UK and Republic of Ireland, 2011

	Title	Total gross (£ million)	3D gross (£ million)	3D as % of total gross	Number of 3D sites	Distributor
1	Harry Potter and the Deathly Hallows: Part 2	73.09	35.36	48	457	Warner Bros
2	Transformers: Dark of the Moon	28.11	18.60	66	441	Paramount
3	Pirates of the Caribbean: On Stranger Tides	32.92	18.42	56	440	Walt Disney
4	Tangled	20.47	11.36	55	387	Walt Disney
5	The Lion King	12.36	11.02	89	402	Walt Disney
6	The Adventures of Tintin: The Secret of the Unicorn*	16.30	10.75	66	431	Paramount
7	Gnomeo & Juliet	15.82	9.71	61	379	eOne Films
8	Thor	14.04	9.53	68	434	Paramount
9	Arthur Christmas*	20.84	9.39	45	396	Sony Pictures
10	Kung Fu Panda 2	16.87	8.34	49	436	Paramount
11	The Smurfs*	17.25	7.93	46	346	Sony Pictures
12	Rio	13.56	7.89	58	403	20th Century Fox
13	Puss in Boots*	14.43	7.55	52	422	Paramount
14	Cars 2	15.62	5.95	38	350	Walt Disney
15	Immortals	6.24	5.32	85	376	Universal
16	Final Destination 5	5.46	5.00	92	383	Warner Bros
17	Captain America: The First Avenger	9.48	4.91	52	374	Paramount
18	The Green Hornet	5.64	4.87	86	362	Sony Pictures
19	Yogi Bear	8.99	4.45	49	352	Warner Bros
20	Hugo*	5.27	4.19	79	365	Entertainment

Source: Rentrak.

Notes:
Box office gross = cumulative total up to 12 February 2012.
Films with an asterisk (*) were still on release on 12 February 2012.
The 3D grosses do not include takings from IMAX screenings, but IMAX revenues contribute to the total gross.

Table 2.5 shows the top 10 films ranked by the ratio of 3D average box office takings per site to 2D average box office ratio per site. The list includes the top films by this ranking from all 3D films released in either 2010 or 2011 and which were shown on both 3D and 2D screens. Six of the films in the list are 2011 releases.

Table 2.5 Top 10 3D films ranked by ratio of 3D site average box office to 2D site average box office, 2010–2011

	Title	Year of release	3D gross (£ 000)	3D sites	3D site average (£)	2D gross (£ 000)	2D sites	2D site average (£)	Ratio of 3D site average to 2D site average
1	Battle of Warsaw	2011	181	21	8,605	6	21	309	27.9
2	TT3D: Closer to the Edge	2011	1,187	227	5,230	71	116	616	8.5
3	Tron: Legacy	2010	7,743	400	19,357	574	232	2,474	7.8
4	Final Destination 5	2011	4,999	383	13,051	461	237	1,947	6.7
5	The Lion King	2011	11,023	402	27,419	1,342	318	4,221	6.5
6	Immortals	2011	5,325	376	14,162	919	326	2,819	5.0
7	Alice in Wonderland	2010	32,155	337	95,414	8,310	426	19,506	4.9
8	Justin Bieber: Never Say Never	2011	2,027	357	5,678	291	219	1,331	4.3
9	StreetDance 3D	2010	11,034	345	31,981	639	80	7,985	4.0
10	Step Up 3	2010	6,869	366	18,769	946	198	4,777	3.9

Source: Rentrak.

Notes:
Box office gross = cumulative total up to 12 February 2012.
The 3D grosses do not include takings from IMAX screenings.

2.5 Best weekend performances of UK films

A total of 32 films topped the UK weekend box office charts over the course of 2011 and 10 of those were UK titles, which spent a total of 23 weeks at number one (Table 2.6). (In 2010, eight UK films achieved the number one slot in the weekend charts for a total of 11 weeks.) *Harry Potter and the Deathly Hallows: Part 2* and *The Inbetweeners Movie* both spent four weekends at the top of the box office charts in 2011, a number unequalled by any other releases in the year. In addition to being the top earning film of the year at the UK box office, the final Harry Potter outing broke the record for the highest ever three-day opening weekend in the UK with a gross of £23.8 million.

Three independent UK films topped the weekend box office chart in 2011 for a total of 10 weeks, compared with one week by one independent UK film (*StreetDance 3D*) in 2010. In addition to *The Inbetweeners Movie's* four weekends in the number one slot, *The King's Speech* and *Tinker, Tailor, Soldier, Spy* both spent three weekends at the top of the chart.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22

Table 2.6 UK films at number one in the weekend box office charts, 2011

Title	First week at top	Weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
Harry Potter and the Deathly Hallows: Part 2	15/07/2011	23.77	73.09	Warner Bros	4
The Inbetweeners Movie	19/08/2011	13.23	45.03	Entertainment	4
The King's Speech	07/01/2011	3.53	45.68	Momentum	3
Tinker, Tailor, Soldier, Spy*	16/09/2011	2.95	14.18	StudioCanal	3
Gnomeo & Juliet	11/02/2011	2.95	15.82	eOne Films	2
Johnny English Reborn*	07/10/2011	4.97	20.63	Universal	2
Arthur Christmas*	02/12/2011	2.11	20.84	Sony Pictures	2
Paul	18/02/2011	5.52	14.2	Universal	1
Pirates of the Caribbean: On Stranger Tides	20/05/2011	11.63	32.92	Walt Disney	1
Sherlock Holmes: A Game of Shadows*	16/12/2011	3.83	26.23	Warner Bros	1

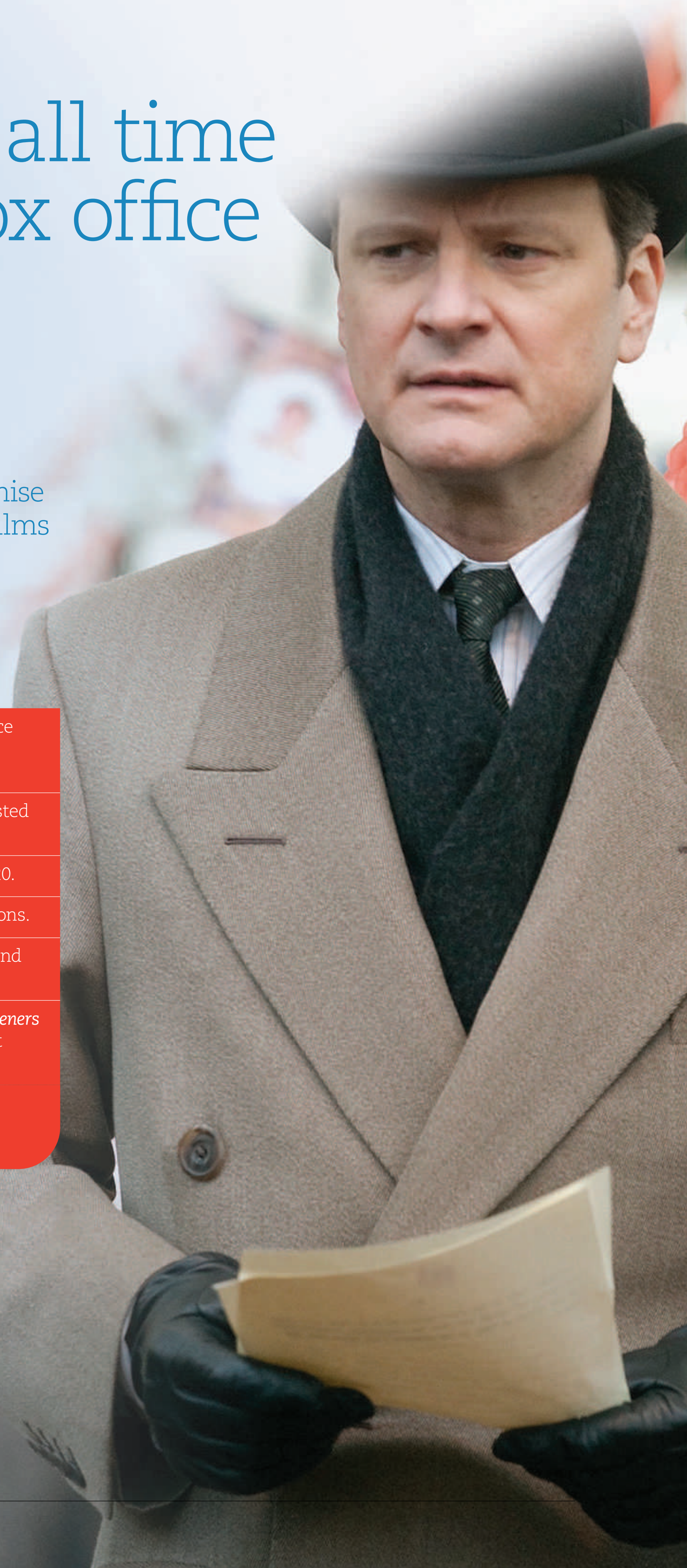
Source: Rentrak, BFI RSU analysis.

Notes:
Box office gross = cumulative total up to 12 February 2012.
Films with an asterisk (*) were still on release on 12 February 2012.

- For more about the top films of all time see Chapter 3 (page 26)
- For more about the top films by genre see Chapter 4 (page 31)
- For more on UK talent and awards see Chapter 7 (page 63)
- For further information about film distribution in 2011 see Chapter 9 (page 86)
- For information about weekend/weekday box office performance see Chapter 9, Table 9.4 (page 89)
- For an overview of the exhibition sector in 2011 see Chapter 10 (page 94)
- For information about Ipsos-Mori audience research on 3D films see www.ipsos-mori.com/researchpublications/publications/1457/3D-Movies-at-the-Cinema.aspx?utm_medium=email&utm_campaign=MediaCTThoughtPiece3DCinema&utm_source=MediaCTeshotlistFeb2012

Chapter 3:

Top films of all time at the UK box office



In 2011, the last outing from the record breaking Harry Potter franchise became one of the all time top 20 films at the UK box office, while three releases entered the chart of all time top 20 independent UK films.

Facts in focus:

- The top 20 highest grossing films at the UK box office includes one film from 2011 – *Harry Potter and the Deathly Hallows: Part 2*.
- *Avatar* remains in the top spot in the inflation-adjusted box office chart, with *Titanic* in second place.
- Sequels and franchise films made up 16 of the top 20.
- Twelve of the top 20 films were UK/USA collaborations.
- Fourteen of the top 20 films were based on stories and characters created by UK writers.
- Two 2011 releases, *The King's Speech* and *The Inbetweeners Movie*, appear in first and second places in the chart of all time top independent UK films.

3.1 Top 20 films at the UK box office, 1989–2011

Avatar remains the highest grossing film of all time at the UK box office, with a final gross of just over £94 million. One film released in 2011 is in the list of top 20 all time films – the eighth and final Harry Potter release, *Harry Potter and the Deathly Hallows: Part 2*. The list, shown in Table 3.1, is dominated by franchise movies, including seven of the eight Harry Potter titles, the Lord of the Rings trilogy and two James Bond films. Only four of the top 20 are neither sequels nor franchise titles, namely *Avatar* (though sequels to this film are currently in development), *Mamma Mia!*, *Titanic* and *The Full Monty*. Twelve of the top 20 films are UK/USA collaborations and 14 of the top 20 are based on stories and characters created by UK writers, which shows the appetite for home-grown subjects and settings amongst British audiences.

Ranking all time top films

In the absence of admissions data on individual films, top films can only be measured in terms of earnings at the box office. Inflation is a key factor affecting earnings and this needs to be borne in mind against some of the figures quoted in this chapter (however, some figures are adjusted for inflation). Most of this chapter relates to actual box office receipts from 1989 onwards (though coverage of box office figures for some high earning films goes back to 1975), so can be categorised as all time top films since it is unlikely that anything produced before 1989 will have earned more in nominal terms.

Table 3.1 Top 20 films at the UK box office, 1989–2011

	Title	Country of origin	UK box office total (£ million)	UK distributor	Year of release
1	Avatar	USA	94.0	20th Century Fox	2009
2	Toy Story 3	USA	73.8	Walt Disney	2010
3	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
4	Mamma Mia!	UK/USA	69.2	Universal	2008
5	Titanic	USA	69.0	20th Century Fox	1998
6	Harry Potter and the Philosopher's Stone	UK/USA	66.1	Warner Bros	2001
7	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	63.0	Entertainment	2001
8	The Lord of the Rings: The Return of the King	USA/NZ	61.1	Entertainment	2003
9	The Lord of the Rings: The Two Towers	USA/NZ	57.6	Entertainment	2002
10	Casino Royale	UK/USA/Czech	55.6	Sony Pictures	2006
11	Harry Potter and the Chamber of Secrets	UK/USA	54.8	Warner Bros	2002
12	Pirates of the Caribbean: Dead Man's Chest	USA	52.5	Walt Disney	2006
13	Harry Potter and the Deathly Hallows: Part 1	UK/USA	52.5	Warner Bros	2010
14	The Full Monty	UK/USA	52.2	20th Century Fox	1997
15	Quantum of Solace	UK/USA	51.2	Sony Pictures	2008
16	Star Wars Episode 1: The Phantom Menace	USA	51.1	20th Century Fox	1999
17	Harry Potter and the Half-Blood Prince	UK/USA	50.7	Warner Bros	2009
18	Harry Potter and the Order of the Phoenix	UK/USA	49.9	Warner Bros	2007
19	Harry Potter and the Goblet of Fire	UK/USA	49.2	Warner Bros	2005
20	The Dark Knight	UK/USA	49.1	Warner Bros	2008

Source: Rentrak, BFI RSU analysis.

Note: Figures have not been inflation adjusted. Box office gross = cumulative total up to 12 February 2012.

3.2 Inflation-adjusted top 20 films at the UK box office, 1975–2011

Table 3.2 shows an inflation-adjusted box office chart based on films released in the UK since 1975 (when coverage of leading titles begins). Even after adjusting the figures for inflation, *Avatar* is the highest grossing film of all time at the UK box office with £98 million in 2010/11 terms, with *Titanic* in second place with £92 million.

The first of three Harry Potter films is at number three, with the franchise's first outing *Harry Potter and the Philosopher's Stone* earning the equivalent of £84 million. The final Harry Potter film is also in the list in eighth place. This is the only 2011 release to make it into the inflation-adjusted top 20, and it replaces *Harry Potter and the Goblet of Fire* in the list. All three Lord of the Rings films make the chart with *The Lord of the Rings: The Fellowship of the Ring* in fourth place (£80 million). In fifth place is *Toy Story 3*, the highest earning film of 2010, with a gross of £76 million. Three classic releases from the 1970s remain in the top 20: *Jaws* (1975) is at number seven with adjusted revenues of £73 million, the original *Star Wars* (1977) appears at number 13 with £69 million and *Grease* (1978) is at 16 with £63 million.

Table 3.2 Top 20 highest grossing films at the UK box office, 1975–2011 (inflation adjusted[1])

	Title	Country of origin	UK box office total (2010/11 £ million)	UK distributor	Year of release
1	Avatar	USA	98.2	20th Century Fox	2009
2	Titanic	USA	92.3	20th Century Fox	1998
3	Harry Potter and the Philosopher's Stone	UK/USA	83.7	Warner Bros	2001
4	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	79.8	Entertainment	2001
5	Toy Story 3	USA	75.8	Walt Disney	2010
6	Mamma Mia!	UK/USA	74.3	Universal	2008
7	Jaws	USA	73.2	UIP	1975
8	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
9	The Lord of the Rings: The Return of the King	USA/NZ	72.9	Entertainment	2003
10	Jurassic Park	USA	72.7	UIP	1993
11	The Full Monty	UK/USA	71.4	20th Century Fox	1997
12	The Lord of the Rings: The Two Towers	USA/NZ	70.7	Entertainment	2002
13	Star Wars	USA	68.8	20th Century Fox	1977
14	Harry Potter and the Chamber of Secrets	UK/USA	67.3	Warner Bros	2002
15	Star Wars Episode 1: The Phantom Menace	USA	67.0	20th Century Fox	1999
16	Grease	USA	63.4	UIP	1978
17	Casino Royale	UK/USA/Czech	61.4	Sony Pictures	2006
18	Pirates of the Caribbean: Dead Man's Chest	USA	57.9	Walt Disney	2006
19	E.T., The Extra-Terrestrial	USA	57.9	UIP	1982
20	Toy Story 2	USA	57.4	Walt Disney	2000

Source: Rentrak, BFI RSU analysis.

1 The 2010/11 £ is calculated using the HMT UK GDP deflator (see link at end of chapter).

3.3 Top 20 UK films at the UK box office, 1989–2011

The list of the all time top 20 UK films is dominated by US studio-backed features but two 2011 independent films, *The King's Speech* and *The Inbetweeners Movie*, are 14th and 15th in the list (Table 3.3). At the top of the list is *Harry Potter and the Deathly Hallows: Part 2*. All of the other seven Harry Potter films also feature in the top 20, together with three titles from the James Bond franchise.

Table 3.3 Top 20 UK films at the UK box office, 1989–2011

	Title	Country of origin	UK box office total (£ million)	UK distributor	Year of release
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
2	Mamma Mia!	UK/USA	69.2	Universal	2008
3	Harry Potter and the Philosopher's Stone	UK/USA	66.1	Warner Bros	2001
4	Casino Royale	UK/USA/Czech	55.6	Sony Pictures	2006
5	Harry Potter and the Chamber of Secrets	UK/USA	54.8	Warner Bros	2002
6	Harry Potter and the Deathly Hallows: Part 1	UK/USA	52.4	Warner Bros	2010
7	The Full Monty	UK/USA	52.2	20th Century Fox	1997
8	Quantum of Solace	UK/USA	51.2	Sony Pictures	2008
9	Harry Potter and the Half-Blood Prince	UK/USA	50.7	Warner Bros	2009
10	Harry Potter and the Order of the Phoenix	UK/USA	49.9	Warner Bros	2007
11	Harry Potter and the Goblet of Fire	UK/USA	49.2	Warner Bros	2005
12	The Dark Knight	UK/USA	49.1	Warner Bros	2008
13	Harry Potter and the Prisoner of Azkaban	UK/USA	46.1	Warner Bros	2004
14	The King's Speech	UK	45.7	Momentum	2011
15	The Inbetweeners Movie	UK	45.0	Entertainment	2011
16	Bridget Jones's Diary	UK/USA	42.0	UIP	2001
17	Charlie and the Chocolate Factory	UK/USA	37.8	Warner Bros	2005
18	Love Actually	UK/USA	36.8	UIP	2003
19	Die Another Day	UK/USA	36.1	20th Century Fox	2002
20	Bridget Jones: The Edge of Reason	UK/USA	36.0	UIP	2004

Source: Rentrak, BFI RSU analysis.

Note: Figures have not been inflation adjusted. Box office gross = cumulative total up to 12 February 2012.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

3.4 Top 20 independent UK films at the UK box office, 1989–2011

Table 3.4 highlights the all time top earning independent (that is, made without US major studio involvement) UK titles. The two highest grossing independent British films are both 2011 releases. *The King's Speech* and *The Inbetweeners Movie* each took more than £45 million at the UK box office, easily beating the previous record of £32 million taken by *Slumdog Millionaire* in 2009. Another 2011 release, *Tinker, Tailor, Soldier, Spy,* is at number five in the list with takings of £14.2 million (up to 12 February 2012). The top 14 UK independent films earned more than £10 million at the UK box office, and the top four earned over £27 million.

Table 3.4 Top 20 independent UK films at the UK box office, 1989–2011

	Title	Country of origin	UK box office total (£ million)	UK distributor	Year of release
1	The King's Speech	UK	45.7	Momentum	2011
2	The Inbetweeners Movie	UK	45.0	Entertainment	2011
3	Slumdog Millionaire	UK	31.7	Pathé	2009
4	Four Weddings and a Funeral	UK	27.8	Carlton	1994
5	Tinker, Tailor, Soldier, Spy*	UK/Fra	14.2	StudioCanal**	2011
6	Trainspotting	UK	12.4	Polygram	1996
7	St Trinian's	UK	12.3	Entertainment	2007
8	Gosford Park	UK/USA#	12.3	Entertainment	2002
9	StreetDance 3D	UK	11.6	Vertigo Films	2010
10	Kick-Ass	UK/USA#	11.6	Universal	2010
11	Bend it Like Beckham	UK/Ger	11.6	Lions Gate	2002
12	Run, Fat Boy, Run	UK/USA#	11.0	Entertainment	2007
13	Kevin and Perry Go Large	UK	10.5	Icon	2000
14	East is East	UK	10.4	Film Four	1999
15	The Queen	UK/Fra/Ita	9.4	Pathé	2006
16	Valiant	UK/USA#	8.5	Entertainment	2005
17	The Duchess	UK/Fra/Ita	7.1	Pathé	2008
18	St Trinian's 2: The Legend of Fritton's Gold	UK	7.1	Entertainment	2009
19	Waking Ned	UK/Fra/USA#	7.1	20th Century Fox	1999
20	Miss Potter	UK/USA#	6.9	Momentum	2007

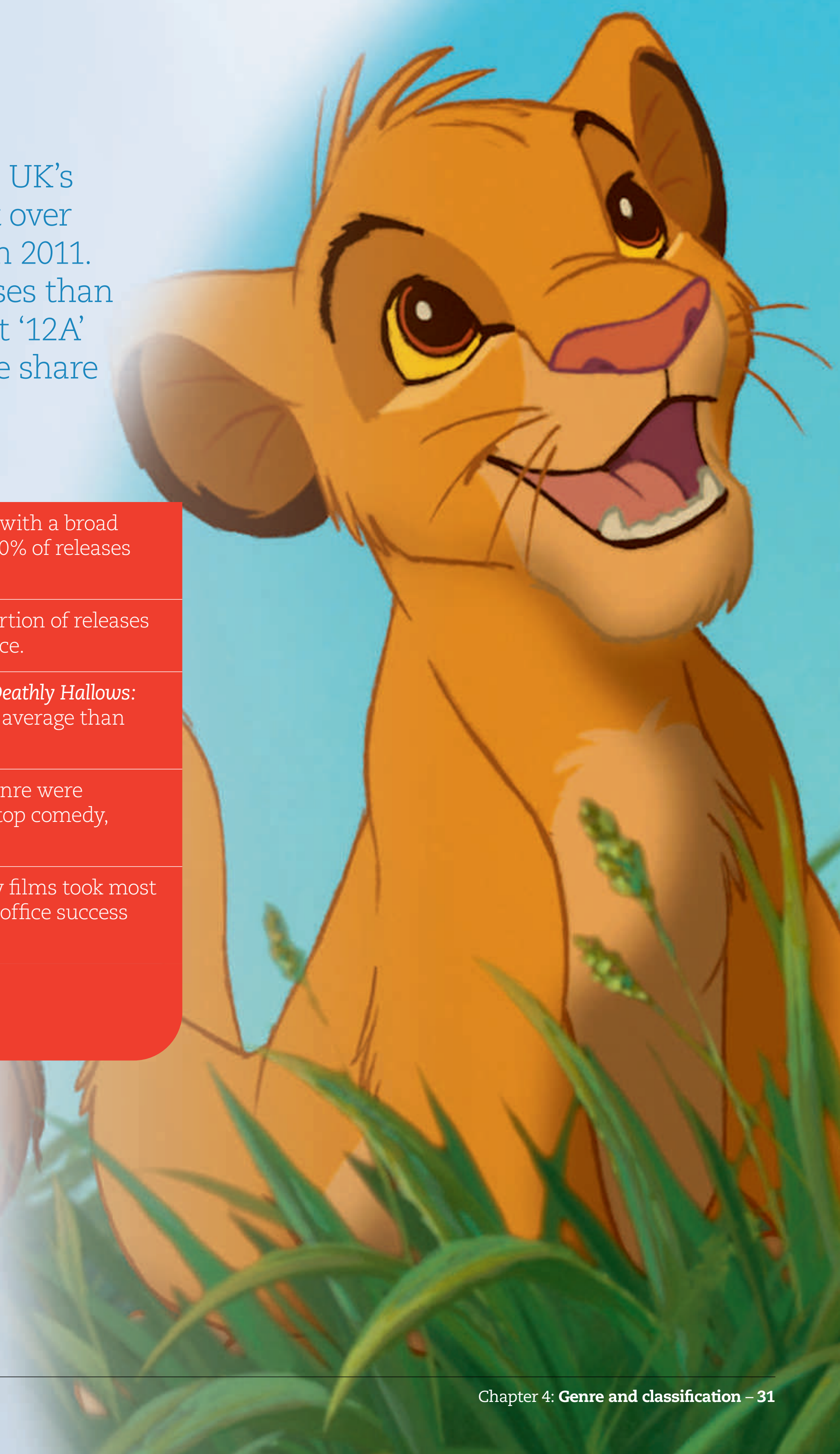
Source: Rentrak, BFI RSU analysis.

Notes:
Figures have not been inflation adjusted. Box office gross = cumulative total up to 12 February 2012.
Films with a single asterisk (*) were still on release on 12 February 2012.
Gosford Park, Kick-Ass, Run, Fat Boy, Run, Valiant, Waking Ned and *Miss Potter* were made with independent (non-studio) US support.
** Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

- For top films in 2011 see Chapter 2 (page 18)
- For more on UK talent see Chapter 7 (page 63)
- For information on the deflators used to calculate inflation adjusted box office takings see www.hm-treasury.gov.uk/data_gdp_index.htm

Chapter 4:

Genre and classification



Comedy is consistently the UK's favourite genre, taking just over one fifth of the box office in 2011. There were more '15' releases than any other classification, but '12A' films took the largest single share of the box office.

Facts in focus:

- Comedy, which is traditionally popular with a broad spectrum of audiences, accounted for 20% of releases and 22% of the box office in 2011.
- Drama accounted for the highest proportion of releases (22%) but shared only 5% of the box office.
- Fantasy, including *Harry Potter and the Deathly Hallows: Part 2*, took more money per cinema on average than other genres.
- Seven of the top performing films by genre were UK films, including the top animation, top comedy, top documentary and top thriller.
- Amongst UK independent films comedy films took most at the box office, mainly due to the box office success of *The Inbetweeners Movie*.

4.1 Genre

For statistical purposes, the BFI Research and Statistics Unit assigned a primary genre to every film released in the UK in 2011. This is not meant to be prescriptive but helps gauge the relative popularity of different genres on a consistent basis from year to year. The list of genres is based on conventions commonly used within the industry and by published sources such as the British Board of Film Classification (BBFC) and the Internet Movie Database (IMDb).

4.1.1 Genre of all film releases

Table 4.1 indicates the relative popularity of different genres at the box office in the UK and Republic of Ireland in 2011. Comedy was once again the top grossing genre (earning £254 million), followed by action (£206 million) and animation (£171 million). The top comedy of the year was UK independent film, *The Inbetweeners Movie*, which took 18% of the genre's total box office. The highest grossing film of the year, *Harry Potter and the Deathly Hallows: Part 2*, helped the fantasy genre to fourth in the box office list, despite this genre having only five releases during the year. In fifth place is biopic, mainly due to the success of *The King's Speech*, which took 74% of the genre's total box office. Drama films had the highest proportion of releases (22%) but only 5% of the box office gross.

Table 4.1 Films released in the UK and Republic of Ireland by genre, 2011 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Comedy	113	20.3	253.6	22.4	The Inbetweeners Movie
Action	91	16.3	205.7	18.1	Transformers: Dark of the Moon
Animation	22	3.9	170.8	15.1	Arthur Christmas
Fantasy	5	0.9	83.3	7.3	Harry Potter and the Deathly Hallows: Part 2
Biopic	10	1.8	61.6	5.4	The King's Speech
Drama	124	22.2	58.5	5.2	Black Swan
Thriller	28	5.0	55.3	4.9	Tinker, Tailor, Soldier, Spy
Romance	16	2.9	51.7	4.6	The Twilight Saga: Breaking Dawn – Part 1
Adventure	10	1.8	49.0	4.3	Pirates of the Caribbean: On Stranger Tides
Family	5	0.9	46.9	4.1	The Smurfs
Horror	32	5.7	37.6	3.3	Paranormal Activity 3
Sci-fi	5	0.9	35.3	3.1	Rise of the Planet of the Apes
Crime	21	3.8	12.4	1.1	Tower Heist
Documentary	68	12.2	11.1	1.0	Senna
Musical/dance	4	0.7	1.5	0.1	Footloose
War	4	0.7	0.3	0.03	Battle of Warsaw
Total	**558**	**100.0**	**1,134.5**	**100.0**	

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.

No fewer than seven of the top performing films by genre were UK films, demonstrating the variety of story types of successful British films (*Arthur Christmas, Harry Potter and the Deathly Hallows: Part 2, The Inbetweeners Movie, The King's Speech, Pirates of the Caribbean: On Stranger Tides, Senna* and *Tinker, Tailor, Soldier, Spy*).

The pattern of genres ranked by the average number of sites at the widest point of release (WPR) is shown in Table 4.2. The top genre by WPR in 2011 was family, which was not used as a principal genre in 2010. In 2011 this included *Alvin and the Chipmunks: Chipwrecked, Horrid Henry: The Movie* and *The Smurfs* (with WPRs of 515, 432 and 493 respectively). Second in the present list is sci-fi (which was also second in 2010) for which the average WPR is based on just five films which included *Battle Los Angeles, Rise of the Planet of the Apes* and *Super 8*, all of which were shown at large numbers of sites (WPRs of 420, 497 and 499 respectively).

At the opposite end of the scale, documentary continued to have a relatively low average number of sites at WPR, though the 2011 average of 35 is higher than 2010's average of 10. The higher average in 2011 was mainly due to three very popular documentaries, *Justin Bieber: Never Say Never, Senna* and *Glee: The 3D Concert Movie*, which had WPRs of 388, 358 and 335 respectively. Two of these films are documentaries featuring popular music concerts which tend to achieve wider releases (and higher box office grosses) than other documentaries. However, even if the concert documentaries are excluded, the average WPR for this genre is 23, due to a range of sporting documentaries such as the Formula 1 biopic *Senna*, *TT3D: Closer to the Edge* (WPR of 125) about the Isle of Man TT motorcycle races, and *From the Ashes* (WPR of 102), a film about the England cricket team's 1981 Ashes series win.

The individual title with the highest WPR (584) was the fantasy genre's *Harry Potter and the Deathly Hallows: Part 2*.

Table 4.2 Films released in the UK and Republic of Ireland by genre, 2011 (ranked by average widest point of release)

Genre	Average number of sites at widest point of release	Number of releases	Gross box office (£ million)
Family	410	5	46.9
Sci-fi	340	5	35.3
Animation	340	22	170.8
Fantasy	334	5	83.3
Adventure	211	10	49.0
Biopic	188	10	61.6
Romance	173	16	51.7
Action	160	91	205.7
Thriller	150	28	55.3
Comedy	145	113	253.6
Horror	125	32	37.6
Musical/dance	112	4	1.5
Crime	86	21	12.4
Drama	50	124	58.5
Documentary	35	68	11.1
War	10	4	0.3
Total	**125**	**558**	**1,134.5**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 4.3 demonstrates what the different genres generated in box office revenues per site, which gives a good indication of performance in the market while controlling for the size of release. Fantasy tops this list, largely due to *Harry Potter and the Deathly Hallows: Part 2* and biopic is second, mainly due to the success of *The King's Speech*. Comedy, which took the largest slice of box office overall, is much lower placed when the average box office per site is taken into account, indicating a long tail of less able performers.

Table 4.3 Films released in the UK and Republic of Ireland by genre, 2011 (ranked by average box office gross per site)

Genre	Average box office per site	Gross box office (£ million)	Total sites
Fantasy	49,907	83.3	1,669
Biopic	32,770	61.6	1,881
Adventure	23,236	49.0	2,109
Family	22,868	46.9	2,050
Animation	22,840	170.8	7,478
Sci-fi	20,780	35.3	1,700
Romance	18,701	51.7	2,765
Comedy	15,467	253.6	16,395
Action	14,137	205.7	14,547
Thriller	13,161	55.3	4,203
Drama	9,494	58.5	6,158
Horror	9,416	37.6	3,995
War	8,104	0.3	39
Crime	6,864	12.4	1,802
Documentary	4,600	11.1	2,408
Musical/dance	3,338	1.5	449
Total	**16,290**	**1,134.5**	**69,648**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.
Note: Total sites = number of releases multiplied by average number of sites at widest point of release.

4.1.2 Genre of UK and UK independent film releases

Looking at UK films and UK independent films released in 2011, we see mainly similar rankings to those for all films for percentages of releases by genre, but differences in share of box office by genre (Figures 4.1 and 4.2). Drama occupied first place for numbers of releases for UK, UK independent and all film releases, and comedy was second for all films and joint second (with documentary) for UK films. For UK independent films documentary was in second place with comedy third. The third placed genre for all films was action. However, when looking at box office by genre, there are notable differences between the three categories. For all three categories, comedy was the top earning genre (22% of the total box office both for all films and for UK films and 35% of the box office share for UK independent films). For all films action had the second highest box office share (18%), for UK films fantasy had the second highest box office share (18%) and for UK independent films biopic had the second highest box office share (30%) (Tables 4.1, 4.4 and 4.5).

Table 4.4 UK films released in the UK and Republic of Ireland by genre, 2011 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Comedy	23	18.1	89.3	21.8	The Inbetweeners Movie
Fantasy	1	0.8	73.1	17.8	Harry Potter and the Deathly Hallows: Part 2
Action	8	6.3	54.3	13.3	Sherlock Holmes: A Game of Shadows
Biopic	5	3.9	53.8	13.1	The King's Speech
Adventure	5	3.9	38.2	9.3	Pirates of the Caribbean: On Stranger Tides
Animation	4	3.1	36.8	9.0	Arthur Christmas
Thriller	10	7.9	16.6	4.0	Tinker, Tailor, Soldier, Spy
Romance	9	7.1	16.5	4.0	One Day
Drama	28	22.0	14.8	3.6	My Week with Marilyn
Family	1	0.8	6.6	1.6	Horrid Henry: The Movie
Documentary	23	18.1	5.9	1.4	Senna
Sci-fi	1	0.8	2.1	0.5	Never Let Me Go
Crime	1	0.8	1.0	0.3	Brighton Rock
Horror	6	4.7	1.0	0.2	The Awakening
Musical/dance	1	0.8	0.0	0.0	Berliner Philharmoniker: A Musical Journey in 3D
War	1	0.8	0.0	0.0	Ice-Cold in Alex
Total	**127**	**100.0**	**410.1**	**100.0**	

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.
Note: Percentages may not add to 100 due to rounding.

Looking just at UK films, comedy topped the box office by genre chart in 2011 (Table 4.4). Independent film *The Inbetweeners Movie* accounted for more than half of this genre's total box office, and the second highest grossing UK comedy, studio-backed film *Johnny English Reborn*, contributed nearly a quarter of the total. Fantasy is second in the list, due to *Harry Potter and the Deathly Hallows: Part 2*'s gross of £73 million. The success of *Sherlock Holmes: A Game of Shadows* and *X-Men: First Class*, which together contributed 76% of the genre's total, helped action to third place in the list, and the success of *The King's Speech* meant that biopic is fourth in the list. (*The King's Speech* took 85% of the total box office for UK biopics.) Drama had more releases than any other genre (22%), but took only 4% of the total box office gross.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 4.5 UK independent films released in the UK and Republic of Ireland by genre, 2011 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Comedy	20	18.2	52.7	34.9	The Inbetweeners Movie
Biopic	4	3.6	46.0	30.5	The King's Speech
Thriller	9	8.2	15.2	10.1	Tinker, Tailor, Soldier, Spy
Drama	27	24.5	13.3	8.8	My Week with Marilyn
Romance	8	7.3	8.5	5.6	Jane Eyre
Family	1	0.9	6.6	4.4	Horrid Henry: The Movie
Action	5	4.5	3.6	2.4	The Three Musketeers
Documentary	22	20.0	2.7	1.8	TT3D: Closer to the Edge
Crime	1	0.9	1.0	0.7	Brighton Rock
Horror	6	5.5	1.0	0.7	The Awakening
Animation	2	1.8	0.1	0.1	Thomas & Friends: Day of the Diesels
Adventure	3	2.7	0.1	0.04	The Mirror Boy
Musical/dance	1	0.9	0.01	0.01	Berliner Philharmoniker: A Musical Journey in 3D
War	1	0.9	0.00	0.00	Ice-Cold in Alex
Total	**110**	**100.0**	**150.8**	**100.0**	

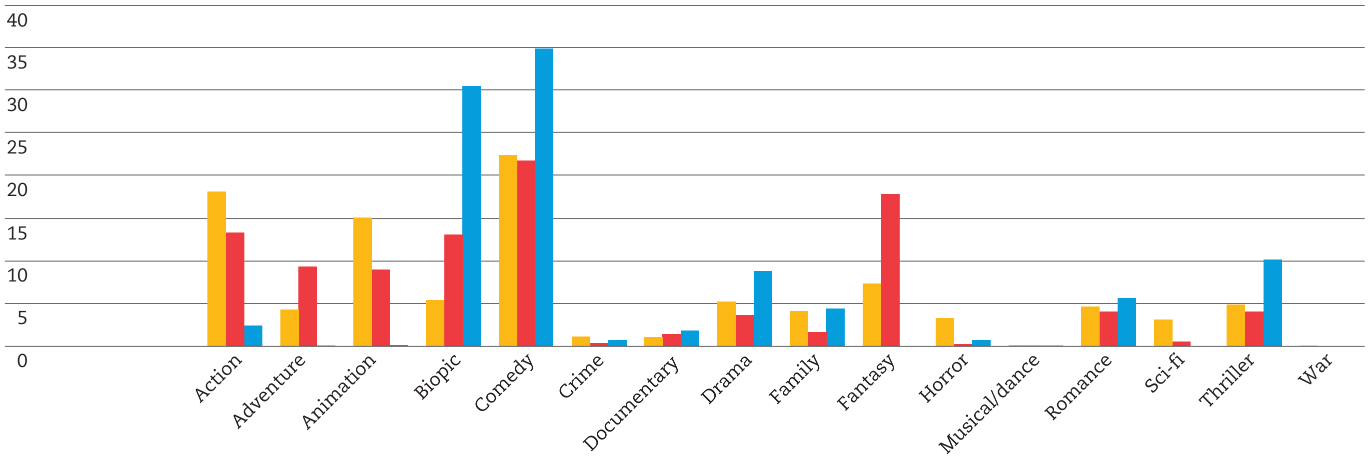
Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.
Note: Percentages may not add to 100 due to rounding.

Of the 127 UK films released in 2011, 110 were UK independent films. Because of the small number of non-independent UK films there are only small differences in the proportions of releases by genre between the two film categories.

As Table 4.5 shows, comedy was the most popular genre for UK independent films. The £53 million earned by comedy films represented 35% of the total box office of all UK independent films. This is largely due to the success of *The Inbetweeners Movie* which grossed more than £45 million. Biopic was the second highest earning genre with 30% of the total box office. *The King's Speech's* record box office for a UK independent film of £45.7 million accounted for almost all of the genre's total. In third place is thriller and again one film, *Tinker, Tailor, Soldier, Spy,* accounted for the majority (93%) of the genre's total box office.

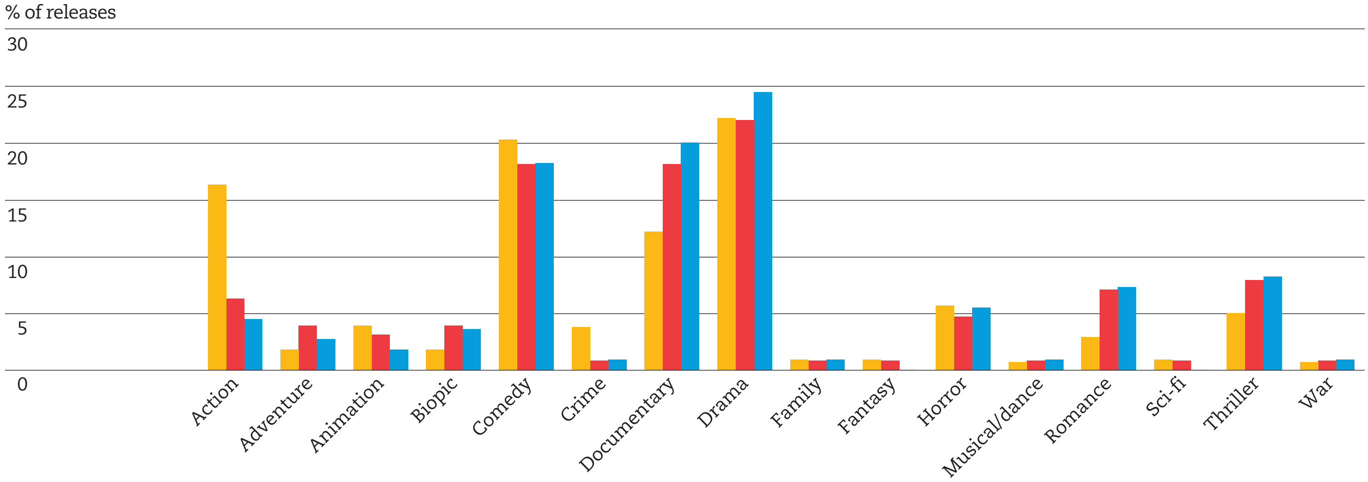
Figure 4.1 Proportion of box office by genre for all films, UK films and UK independent films, 2011



	Action	Adventure	Animation	Biopic	Comedy	Crime	Documentary	Drama	Family	Fantasy	Horror	Musical/dance	Romance	Sci-fi	Thriller	War
All films	18.1	4.3	15.1	5.4	22.4	1.1	1.0	5.2	4.1	7.3	3.3	0.1	4.6	3.1	4.9	<0.01
UK films	13.3	9.3	9.0	13.1	21.8	0.3	1.4	3.6	1.6	17.8	0.2	<0.01	4.0	0.5	4.0	<0.01
UK independent films	2.4	0.04	0.1	30.5	34.9	0.7	1.8	8.8	4.4	–	0.7	0.01	5.6	–	10.1	<0.01

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figure 4.2 Proportion of releases by genre for all films, UK films and UK independent films, 2011



	Action	Adventure	Animation	Biopic	Comedy	Crime	Documentary	Drama	Family	Fantasy	Horror	Musical/dance	Romance	Sci-fi	Thriller	War
All films	16.3	1.8	3.9	1.8	20.3	3.8	12.2	22.2	0.9	0.9	5.7	0.7	2.9	0.9	5.0	0.7
UK films	6.3	3.9	3.1	3.9	18.1	0.8	18.1	22.0	0.8	0.8	4.7	0.8	7.1	0.8	7.9	0.8
UK independent films	4.5	2.7	1.8	3.6	18.2	0.9	20.0	24.5	0.9	–	5.5	0.9	7.3	–	8.2	0.9

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

4.2 BBFC classification

All films in the UK must carry a classification indicating their suitability for exhibition in premises licensed for cinematic exhibition by local authorities. The British Board of Film Classification (BBFC) classifies the majority of films for theatrical release, although local authorities may grant their own classification if they decide to do so.

The symbols used by the BBFC, and their meanings, are given in Table 4.6.

Table 4.6 BBFC cinema film classifications

U (Universal)	Suitable for all
PG (Parental Guidance)	General viewing, but some scenes may be unsuitable for young children
12A	No-one younger than 12 may see a '12A' film in a cinema unless accompanied by an adult
15	No-one younger than 15 may see a '15' film in a cinema
18	No-one younger than 18 may see an '18' film in a cinema

Source: BBFC website.

4.2.1 Releases and box office by classification

Table 4.7 provides a picture of how 2011 releases were classified. It shows that, as in previous years, more '15' films (38%) were released than any other category, but the largest share of box office gross was earned by '12A' films (45%). The proportion of '15' films released was very similar to 2010 (37%), while the proportion of '12A' films released was up from 26% in 2010 to 30%. The '15' classification accounted for 28% of the gross box office.

Table 4.7 Releases in UK and Republic of Ireland by BBFC film classification, 2011

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	49	8.8	174.4	15.4	Arthur Christmas
PG	73	13.1	116.5	10.3	Johnny English Reborn
12A	168	30.1	507.1	44.7	Harry Potter and the Deathly Hallows: Part 2
15	212	38.0	315.6	27.8	The Inbetweeners Movie
18	45	8.1	21.0	1.8	The Girl with the Dragon Tattoo
No classification	11	2.0	0.1	0.0	The Portuguese Nun
Total	**558**	**100.0**	**1,134.5**	**100.0**	

Source: Rentrak, BBFC, BFI RSU analysis.

Figures as at 12 February 2012.
Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Percentages may not add to 100 due to rounding.

Table 4.8 shows the breakdown of classifications for UK films released in 2011, and Table 4.9 shows the breakdown for UK independent films. The proportions of films released by BBFC classification were broadly similar for all films, UK films and UK independent films. UK independent films had a lower proportion of '12A' releases than the other two categories (though, as with all films and UK films, the '12A' classification accounted for the second highest number of releases for this category). Another difference was that UK independent films had a slightly higher proportion of films classified as '18' than classified as 'U' whereas the reverse was true for the other two categories. However, because of the high earning international and UK non-independent films there were differences in box office takings by classification between UK independent films and the others, all films and UK films (Figure 4.3).

Table 4.8 Releases of UK films in UK and Republic of Ireland by BBFC film classification, 2011

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	14	11.0	49.3	12.0	Arthur Christmas
PG	15	11.8	26.7	6.5	Johnny English Reborn
12A	30	23.6	227.8	55.6	Harry Potter and the Deathly Hallows: Part 2
15	55	43.3	104.0	25.3	The Inbetweeners Movie
18	12	9.4	2.3	0.6	Neds
No classification	1	0.8	0.0	0.0	How Much Does Your Building Weigh, Mr Foster?
Total	**127**	**100.0**	**410.1**	**100.0**	

Source: Rentrak, BBFC, BFI RSU analysis.

Figures as at 12 February 2012.
Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Percentages may not add to 100 due to rounding.

Table 4.9 Releases of UK independent films in UK and Republic of Ireland by BBFC film classification, 2011

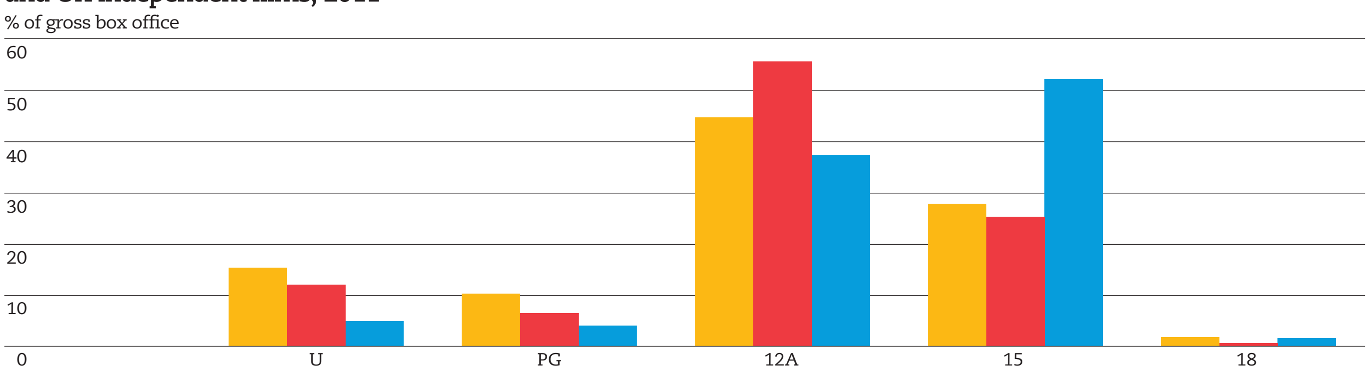
BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	11	10.0	7.4	4.9	Horrid Henry: The Movie
PG	14	12.7	6.1	4.0	Jane Eyre
12A	21	19.1	56.4	37.4	The King's Speech
15	51	46.4	78.7	52.2	The Inbetweeners Movie
18	12	10.9	2.3	1.6	Neds
No classification	1	0.9	0.0	0.0	How Much Does Your Building Weigh, Mr Foster?
Total	**110**	**100.0**	**150.8**	**100.0**	

Source: Rentrak, BBFC, BFI RSU analysis.

Figures as at 12 February 2012.
Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Percentages may not add to 100 due to rounding.

As Figure 4.3 shows, for all films and UK films the highest earning classification was '12A' (45% of the total box office for all films and 56% of the total box office for UK films), whereas for UK independent films the highest earning classification was '15' (52% of the total box office). Six of the top 10 films at the UK box office in 2011 were '12A' films. Four of these were UK films but only one (*The King's Speech*) was an independent film. All five non-independent films contributed to the difference between all films and UK independent films while three of these, *Harry Potter and the Deathly Hallows: Part 2*, *Pirates of the Caribbean: On Stranger Tides* and *Sherlock Holmes: A Game of Shadows*, had a major impact on the difference between UK films and UK independent films (see Tables 4.7, 4.8 and 4.9).

Figure 4.3 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2011



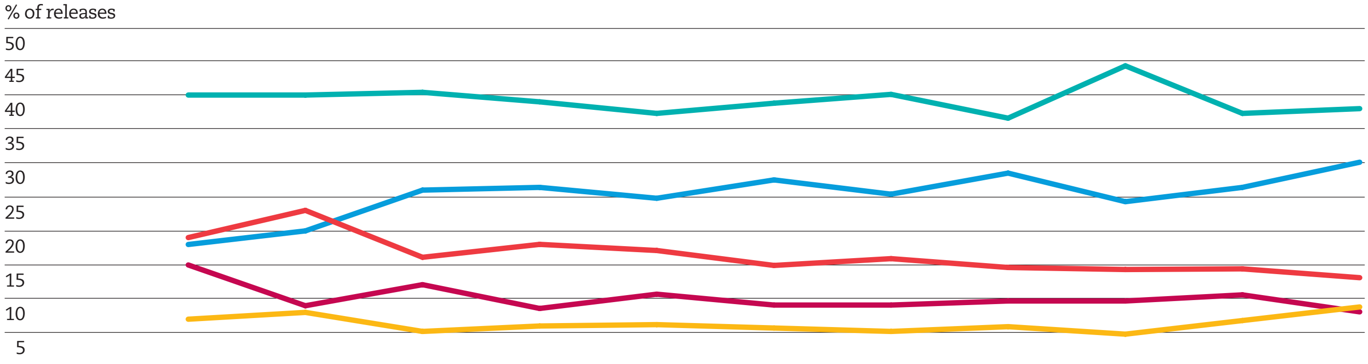
	U	PG	12A	15	18
All films	15.4	10.3	44.7	27.8	1.8
UK films	12.0	6.5	55.6	25.3	0.6
UK independent films	4.9	4.0	37.4	52.2	1.6

Source: Rentrak, BBFC, BFI RSU analysis.

Figures as at 12 February 2012.
Note: Category '12A' includes those films that were given the '12' classification before 2003. The '12' classification was superseded by '12A' for films showing at the cinema in August 2002. The first film given a '12A' classification was *The Bourne Identity*.

There has been some gradual change in the proportions of films by classification over the last 11 years, as shown in Figure 4.4. The most common classification '15' has generally had a 37% – 40% share of annual releases. (This increased to 44% in 2009, the year *Slumdog Millionaire* was released.) The second and third most common classifications 'PG' and '12A' have together accounted for over 40% of releases in most of the 11 years. During that time, the slow decline in the 'PG' classification has been compensated for by a rising trend in the '12A' classification. The 'U' and '18' classifications have consistently accounted for the smallest percentages of releases since 2001. However, from 2001 to 2010 there were more '18' classified films released each year, whereas in 2011 there were slightly more 'U' classified films than films with the '18' classification (9% of releases were classified as 'U' compared with 8% of releases classified as '18').

Figure 4.4 Percentage of releases in UK and Republic of Ireland by film classification, 2001–2011



0	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
U	7.0	8.0	5.2	6.0	6.2	5.7	5.2	5.9	4.8	6.8	8.8
PG	19.0	23.0	16.1	18.0	17.1	14.9	15.9	14.6	14.3	14.4	13.1
12A	18.0	20.0	26.0	26.4	24.8	27.5	25.4	28.5	24.3	26.4	30.1
15	40.0	40.0	40.4	39.0	37.3	38.8	40.1	36.6	44.3	37.3	38.0
18	15.0	9.0	12.1	8.6	10.7	9.1	9.1	9.7	9.7	10.6	8.1

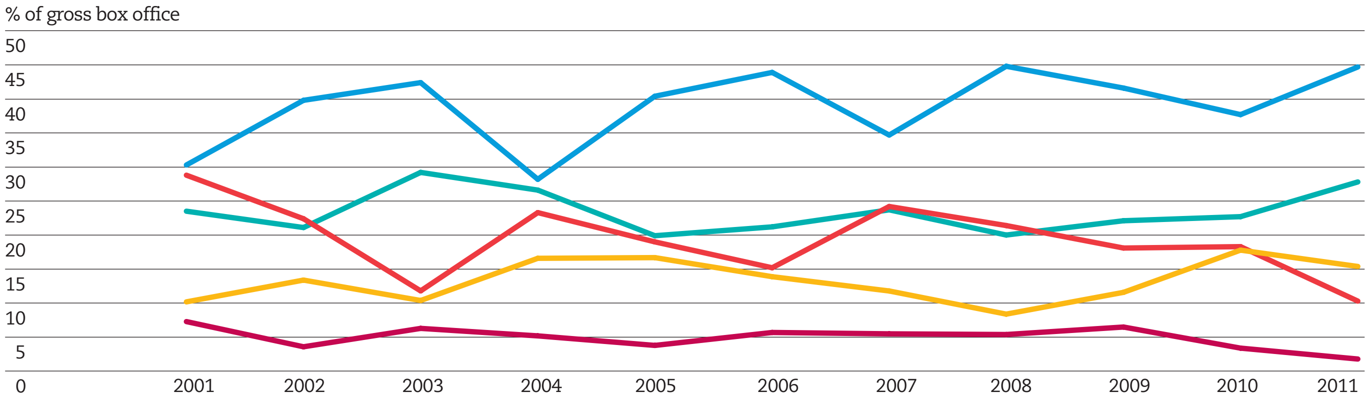
Source: Rentrak, BBFC, BFI RSU analysis.

See note to Figure 4.3.

The shares of box office by film classification vary widely from year to year as demonstrated in Figure 4.5. However, the box office ranking of the classifications has remained fairly constant over time, the top earner being ‘12A’, with ‘U’ and ‘18’ consistently being the lowest earners up to 2010, and ‘PG’ and ‘15’ exchanging second and third places over the years. In 2007 and 2008 films in the ‘PG’ category earned more at the box office than those in the ‘15’ category, but this was reversed in 2009 with the ‘15’ films increasing their share of the box office to 22% and ‘PG’ films reducing their share to 18%. The box office shares for these two categories were similar in 2010 to those for 2009, but the rankings and shares have changed in 2011. In 2011 the ‘15’ classification remained in second place in the box office rankings but its share increased from 23% to 28%, the ‘U’ classification overtook the ‘PG’ classification to move up to third in the rankings with a box office share of 15% and ‘PG’ is fourth in the rankings with a share of 10%.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 4.5 Percentage of gross box office of releases in UK and Republic of Ireland by film classification, 2001–2011



	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
U	10.2	13.4	10.4	16.6	16.7	13.9	11.8	8.4	11.6	17.8	15.4
PG	28.8	22.4	11.8	23.3	19.0	15.2	24.2	21.4	18.1	18.3	10.3
12A	30.3	39.8	42.4	28.2	40.4	43.9	34.7	44.8	41.6	37.7	44.7
15	23.5	21.1	29.2	26.6	19.9	21.2	23.7	20.0	22.1	22.7	27.8
18	7.3	3.6	6.3	5.2	3.8	5.7	5.5	5.4	6.5	3.4	1.8

Source: Rentrak, BBFC, BFI RSU analysis.

Figures as at 12 February 2012.
See note to Figure 4.3.

4.2.2 Top films by classification

Table 4.10 gives the top 10 'U' classified films in 2011. Animation is the genre most represented in the table with seven out of 10 titles. (Animation is traditionally aimed at the youngest audiences for which a 'U' classification is preferable). Only two films in the list (*Alvin and the Chipmunks: Chipwrecked* and *Hop*) were not shown in 3D. Overall, for the eight 3D films, 54% of the box office was from 3D screens. The highest percentage was for the 3D reversioning of *The Lion King* (89%), while the lowest percentage was for *Cars 2* (38%). The top film in the list, *Arthur Christmas*, is one of two UK films in the top 10, which is one more than last year.

Table 4.10 Top 10 'U' classified films, 2011

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
Arthur Christmas	UK/USA	20.8	Sony Pictures	Animation
The Smurfs	USA	17.2	Sony Pictures	Family
Gnomeo & Juliet	UK/USA	15.8	eOne Films	Animation
Cars 2	USA	15.6	Walt Disney	Animation
Puss in Boots	USA	14.4	Paramount	Animation
Alvin and the Chipmunks: Chipwrecked	USA	14.0	20th Century Fox	Family
Rio	USA	13.6	20th Century Fox	Animation
The Lion King	USA	12.4	Walt Disney	Animation
Yogi Bear	USA/NZ	9.0	Warner Bros	Family
Hop	USA	7.8	Universal	Animation

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.

Animation and comedy, with four films each, are the genres most represented in the top 10 performing 'PG' classified films (Table 4.11). Two of the animations, *The Adventures of Tintin: The Secret of the Unicorn* and *Kung Fu Panda 2* were shown in 3D. *Kung Fu Panda 2* took just under half its gross from 3D screens and *The Adventures of Tintin: The Secret of the Unicorn* took 65% of its gross from 3D screens. Two UK films are in the chart, one fewer than in 2010. Again, the top performing title was a UK film.

Table 4.11 Top 10 'PG' classified films, 2011

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
Johnny English Reborn	UK/USA	20.6	Universal	Comedy
Tangled	USA	20.5	Walt Disney	Animation
Kung Fu Panda 2	USA	16.9	Paramount	Animation
The Adventures of Tintin: The Secret of the Unicorn	USA/NZ	16.3	Paramount	Animation
Mr. Popper's Penguins	USA	8.6	20th Century Fox	Comedy
Rango	USA	7.1	Paramount	Animation
Big Mommas: Like Father, Like Son	USA	5.2	20th Century Fox	Comedy
Jane Eyre	UK	5.1	Universal	Romance
Spy Kids: All the Time in the World	USA	4.3	Entertainment	Action
The Zookeeper	USA	3.5	Sony Pictures	Comedy

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.

The top three '12A' films in 2011 were *Harry Potter and the Deathly Hallows: Part 2*, *The King's Speech* and *Pirates of the Caribbean: On Stranger Tides*, which were the top two highest grossing films and the fourth highest grossing film of the year respectively (and all three were UK films). Action, with four films, is the genre most represented in the list. Five of the top 10 films came from the UK, one more than last year (Table 4.12).

Table 4.12 Top 10 '12A' classified films, 2011

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	Fantasy
The King's Speech	UK	45.7	Momentum	Biopic
Pirates of the Caribbean: On Stranger Tides	UK/USA	32.9	Walt Disney	Adventure
The Twilight Saga: Breaking Dawn – Part 1	USA	30.8	eOne Films	Romance
Transformers: Dark of the Moon	USA	28.1	Paramount	Action
Sherlock Holmes: A Game of Shadows	UK/USA	26.2	Warner Bros	Action
Rise of the Planet of the Apes	USA	20.8	20th Century Fox	Sci-fi
Fast & Furious 5	USA	18.5	Universal	Action
Mission: Impossible – Ghost Protocol	USA	18.0	Paramount	Action
X-Men: First Class	UK/USA	15.0	20th Century Fox	Action

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.

By definition, '15' classified films contain stronger material than those deemed suitable for younger audiences. Depending on the type of film they are likely to involve more adult-oriented themes and the use of stronger language. This is reflected in the top 10, where the comedy and thriller genres account for seven of the films in the list (Table 4.13). The '15' category films were topped by the independent UK comedy *The Inbetweeners Movie*. Three of the 10 films came from the UK, two more than last year.

Table 4.13 Top 10 '15' classified films, 2011

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
The Inbetweeners Movie	UK	45.0	Entertainment	Comedy
The Hangover Part II	USA	32.8	Warner Bros	Comedy
Bridesmaids	USA	23.0	Universal	Comedy
Black Swan	USA	16.2	20th Century Fox	Drama
Paul	UK/USA	14.2	Universal	Comedy
Tinker, Tailor, Soldier, Spy	UK/Fra	14.2	StudioCanal*	Thriller
Paranormal Activity 3	USA	10.7	Paramount	Horror
Horrible Bosses	USA	10.5	Warner Bros	Comedy
True Grit	USA	8.5	Paramount	Adventure
Limitless	USA	8.3	Paramount	Thriller

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.
Note: * Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

Because of the nature of '18' classified films, which contain the strongest content, their audience appeal is generally much narrower than other categories. The most popular genres of the top 10 titles in this category in 2011 were action and drama, with three titles each, followed by thriller with two titles (Table 4.14). In 2009 two films, *Bruno* and *Inglourious Basterds* broke the £10 million barrier, but it is unusual for '18' films to take so much at the box office, and only the top '18' classified film of 2011, *The Girl with the Dragon Tattoo*, did so. Five UK films are among the top 10 of this classification in 2011, compared with only one in 2010.

Table 4.14 Top 10 '18' classified films, 2011

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
The Girl with the Dragon Tattoo	USA/Swe	12.0	Sony Pictures	Thriller
Drive	USA	3.0	Icon	Action
Drive Angry (3D)	USA	1.2	Lions Gate	Action
Neds	UK/Fra/Ita	1.0	eOne Films	Drama
The Devil's Double	Bel	0.7	Icon	Biopic
Blitz	UK	0.6	Lions Gate	Thriller
A Very Harold & Kumar 3D Christmas	USA	0.6	Warner Bros	Comedy
Kill List	UK	0.3	StudioCanal*	Horror
Tyrannosaur	UK	0.2	StudioCanal*	Drama
Weekend	UK	0.2	Peccadillo Pictures	Drama

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Figures as at 12 February 2012.
* See note to Table 4.13.

- For cinema admissions and box office in 2011 see Chapter 1 (page 8)
- For top foreign language films of the last 11 years see Chapter 5 (page 46)
- For a look at cinema audiences see Chapter 15 (page 140)
- For information about film classification in the UK see www.bbfc.org.uk

Chapter 5:

Specialised films

Specialised films are a vital part of our film culture and offer audiences an experience of cinema that is very different from mainstream commercial fare. In 2011, they made up over 60% of films released in the UK and grossed nearly £200 million.

Facts in focus:

- 346 specialised films were released in the UK in 2011 (62% of the total) earning £198.5 million (17.5% of the total box office).
- Films in 28 different languages (including English) were released in the UK in 2011.
- 180 foreign language films made up 32% of total releases, but shared just 2% of the UK box office.
- The highest grossing foreign language film was Pedro Almodovar's ***The Skin I Live In*** with £1.5 million.
- 68 documentary films were released, accounting for 12% of releases and 1% of the total box office.
- 32 classic and archive films were re-released (6% of the total), accounting for 1.2% of the total box office.

5.1 About specialised films

The BFI considers most feature documentaries, subtitled foreign language films and re-releases of archive/classic films to be specialised. For films that do not fall into these categories, other criteria are applied and consideration is given to films that are less easy to define as a particular genre or those that deal with challenging and complex subject matter. For more information on the BFI's definition of specialised film, and to access its specialised film database, see www.bfi.org.uk/film-industry/lottery-funding-distribution-and-exhibition/specialised-films.

The BFI's definition of 'specialised' is broad and relates to those films that do not sit easily within a mainstream and highly commercial genre. Many are from the independent production sector (although they may be handled by a mainstream, studio-based distributor) or are made with a low production budget (compared with a studio production). They may focus more on script and character than on effects and star names and may be expected to appeal to a narrower audience segment than mainstream films.

5.2 Specialised films at the UK box office in 2011

In total, 346 specialised films were released in 2011, representing 62% of the total number of UK theatrical releases in the year (Table 5.1). These films grossed £198.5 million, a 17.5% share of total box office earnings. It is interesting to note the small share of gross box office earned by the first three categories of specialised film: documentaries (1.0%), foreign language films (2.2%) and re-releases (1.2%).

Table 5.1 Specialised films in the UK and Republic of Ireland, 2011

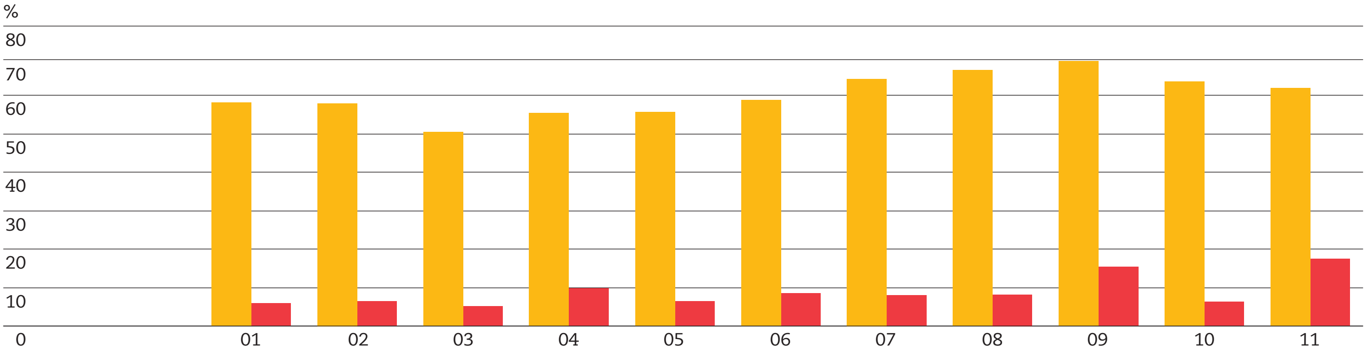
Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentaries	68	12	11.1	1.0	36
Foreign language	180	32	24.4	2.2	18
Re-releases	32	6	13.8	1.2	31
Other specialised films	88	16	150.2	13.2	88
All specialised films*	346	62	198.5	17.5	41
All films	**558**	**100**	**1,134.5**	**100.0**	**125**

Source: BFI RSU analysis of Rentrak data.

* Due to some overlap of categories (eg a film can be categorised as foreign language and as a documentary) the total refers to the number of specialised films, not the sum total of the categories in the table.

An analysis of specialised film releases and market share from 2001 to 2011 is shown in Figure 5.1. The proportion of specialised film releases increased steadily from 2003 to 2009 while market share has remained at around 8% apart from two peak years in 2009 and 2011 when a small number of specialised titles crossed over to mainstream audiences.

Figure 5.1 Specialised films 2001–2011: percentage of releases and market share

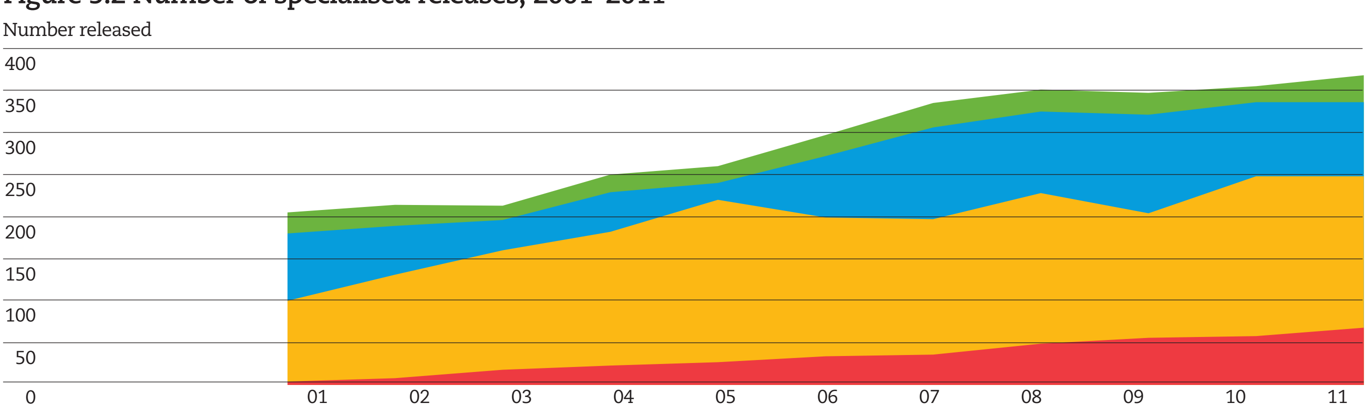


	01	02	03	04	05	06	07	08	09	10	11
Specialised films as % of total releases	58.2	58.0	50.5	55.4	55.7	58.8	64.4	66.6	69.0	63.6	62.0
Market share of specialised films (%)	5.9	6.4	5.1	9.8	6.5	8.5	8.0	8.2	15.4	6.3	17.5

Source: BFI RSU analysis of Rentrak data.

By sorting specialised films into four separate categories – documentaries, foreign language films, re-releases and other specialised films with a distinctive genre, hook or style – we can better understand the patterns of specialised film distribution over time. As Figure 5.2 shows, there has been a steady increase in the number of theatrically released feature documentaries over the last 11 years – from a low point of four in 2001 to 68 in 2011. The number of re-released films tracked by Rentrak has remained largely the same, although this figure does not include all re-releases, particularly limited or one-off screenings often in independent cinemas. The number of foreign language films increased from a low point of 96 releases in 2001 to a peak of 193 in 2005 and has since fluctuated. Finally, the more subjective category of films with innovative or unconventional approaches, genre or style saw numbers decline from 80 in 2001 to a low of 20 in 2005 before rising again to a peak of 117 in 2009.

Figure 5.2 Number of specialised releases, 2001–2011

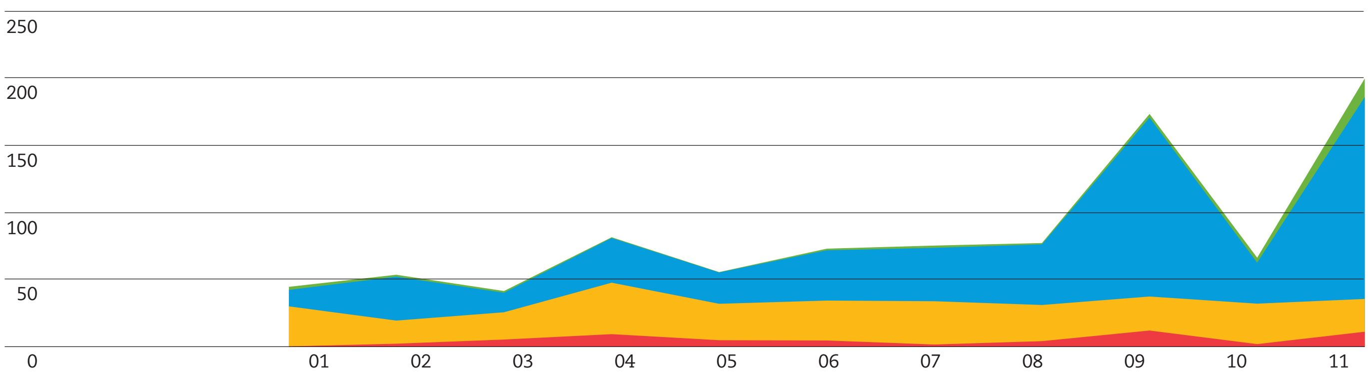


	01	02	03	04	05	06	07	08	09	10	11
Documentary	4	8	18	23	27	34	36	49	56	58	68
Foreign language	96	123	142	159	193	165	161	179	148	190	180
Re-release	25	25	17	21	20	25	29	26	26	19	32
Other specialised	80	58	36	47	20	73	109	97	117	88	88

Source: BFI RSU analysis of Rentrak data.

The box office performance of specialised films, again split into the four categories of documentaries, foreign language films, re-releases and other specialised films with a distinctive hook, genre or style, is shown in Figure 5.3. Box office revenues for documentaries soared in 2009 with the release of *Michael Jackson's This Is It*, but they declined to £1.9 million in 2010 before rising again in 2011 with the success of *Senna* and *TT3D: Closer to the Edge*. Foreign language film grosses have fluctuated depending on individual high grossing titles (such as *Crouching Tiger*, *Hidden Dragon* and *Amélie* in 2001 and *The Passion of the Christ* in 2004). 2011's figure for foreign language films was the lowest since 2003. The combined revenues for re-releases are comparatively small and have only risen above £2 million on four occasions in the last 11 years, again depending on one or two high profile re-issues. The 3D re-release of *The Lion King* contributed to a record figure for re-releases in 2011. Finally, the more subjective category of titles with distinctive and non-mainstream genres or styles saw a huge increase in revenue in 2011 (£150 million) due to the performance of films such as *The King's Speech*, *Black Swan*, *Tinker*, *Tailor*, *Soldier*, *Spy* and *Hugo* which were classified as 'specialised' prior to theatrical release.

Figure 5.3 Box office gross (£ million) of specialised films, 2001–2011



	01	02	03	04	05	06	07	08	09	10	11
Documentary	0.2	2.2	5.3	9.3	4.8	4.6	1.6	4.1	12.0	1.9	11.1
Foreign language	29.8	17.2	20.3	38.3	27.1	29.7	32.2	26.9	25.3	30.1	24.4
Re-release	2.3	1.4	1.3	0.6	0.3	1.2	1.7	1.0	2.7	3.7	13.8
Other specialised	12.2	32.7	14.5	33.2	23.3	37.4	39.7	45.1	133.1	30.5	150.2

Source: BFI RSU analysis of Rentrak data.

5.3 Foreign language films

Films in 28 different languages (including English) were released in the UK and the Republic of Ireland in 2011, compared with 29 in 2010 (Table 5.2). French was the next most common language after English in terms of number of releases, followed by Hindi, Tamil and Spanish. Hindi was again the top non-English language at the box office by value, with a 1% share of revenues, followed by French (0.3%) and Spanish (0.2%).

Table 5.2 Languages of films released, 2011

Main language	Number of releases	Gross box office (£ million)	Box office share (%)
English	360	1,091.3	96.2
English with others*	17	18.8	1.7
Hindi	36	12.5	1.1
French	41	3.7	0.3
Spanish	11	2.5	0.2
Japanese	7	1.2	0.1
Tamil	25	1.2	0.1
German	6	0.7	0.1
Norwegian	2	0.5	0.1
Italian	6	0.5	0.1
Farsi	1	0.4	<0.1
Punjabi	7	0.3	<0.1
Urdu	1	0.2	<0.1
Polish	2	0.2	<0.1
Danish	2	0.1	<0.1
Russian	2	0.1	<0.1
Portuguese	4	0.1	<0.1
Cantonese	3	0.1	<0.1
Korean	3	<0.1	<0.1
Welsh**	1	<0.1	<0.1
Turkish	6	<0.1	<0.1
Malayalam	8	<0.1	<0.1
Bosnian	1	<0.1	<0.1
Czech	1	<0.1	<0.1
Greek	1	<0.1	<0.1
Kyrgyz	1	<0.1	<0.1
Sotho	1	<0.1	<0.1
Arabic	1	<0.1	0.1
Afghan Dari	1	<0.1	<0.1
Total	**558**	**1,134.5**	**100.0**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

* English with others' includes films whose main language was English but with extensive use of other languages, such as *Senna* in English and Portuguese.

** Welsh is a UK national language.

The 26 foreign languages were spread over 180 releases in the UK and Republic of Ireland (32% of all releases, down three percentage points since 2010), earning £24 million at the box office (Table 5.3). This represented 2% of the total UK gross box office for 2011, down from 3% in 2010.

Table 5.3 Foreign language films at the UK and Republic of Ireland box office, 2002–2011

	Number	% of all releases	Box office (£ million)	% of total gross box office
2002	131	35.5	17.1	2.2
2003	147	34.7	20.4	2.5
2004	169	37.5	38.1	4.6
2005	203	43.5	26.9	3.2
2006	171	33.9	29.8	3.5
2007	170	32.9	32.3	3.5
2008	188	35.7	27.1	2.9
2009	161	32.0	25.6	2.3
2010	199	35.7	30.3	3.0
2011	180	32.3	24.4	2.2

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Note: Figures as at 12 February 2012.

Films in European languages other than English earned 0.7% of the gross box office from 15.4% of releases and South Asian sub-continent languages shared 1.3% of the box office from 14% of releases (Table 5.4). Taken together, foreign language films played on average at only 18 sites at their widest point of release (down from 19 in 2010) compared with an average of 176 for English language releases.

Table 5.4 Language of releases in the UK and Republic of Ireland, 2011 (ranked by number of releases)

Main language	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Average sites at widest point of release
English and English with others*	377	67.6	1,110.1	97.8	176
European other than English**	86	15.4	8.5	0.7	14
South Asian sub-continent	77	13.8	14.2	1.3	23
Other Asian	14	2.5	1.3	0.1	17
Other international	4	0.7	0.4	<0.1	9
Total	**558**	**100.0**	**1,134.5**	**100.0**	**125**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

* See note to Table 5.2.
** Includes Welsh.

Notes:
Figures as at 12 February 2012.
Percentages may not sum to 100 due to rounding.

The top foreign language film of 2011 was Pedro Almodovar's *The Skin I Live In* (Table 5.5) which was the only non-Hindi film to earn more than £1 million. Three Japanese and three French films also feature in the top 10 alongside one German-French co-production.

Table 5.5 Top 10 foreign language* films released in the UK and Republic of Ireland, 2011

	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	The Skin I Live In	Spain	1.5	20th Century Fox	Spanish
2	Potiche	France	0.8	StudioCanal	French
3	Pina	Germany/France	0.7	Artificial Eye	German
4	Biutiful	Mexico/Spain	0.6	StudioCanal	Spanish
5	Trollhunter	Norway	0.5	Momentum/Alliance	Norwegian
6	Sarah's Key	France	0.5	StudioCanal	French
7	Arrietty	Japan	0.4	StudioCanal	Japanese
8	Little White Lies	France	0.4	Lions Gate	French
9	13 Assassins	Japan	0.4	Artificial Eye	Japanese
10	Norwegian Wood	Japan	0.4	Soda Pictures	Japanese

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

* Excluding Hindi titles – see Table 5.6.
Note: Figures as at 12 February 2012.

Table 5.6 shows the top Hindi film releases at the UK box office in 2011. Three titles earned more than £1 million, with *RA.One* topping the list (£1.5 million) followed by *Don 2* and *Bodyguard*. Two India/UK collaborations feature in the top 10 – *Patiala House* and *Desi Boyz*.

Table 5.6 Top 10 Hindi films released in the UK and Republic of Ireland, 2011

	Film	Country of origin	Box office gross (£ million)	Distributor	Main language
1	RA.One	India/USA	1.5	Eros International	Hindi
2	Don 2	India	1.4	Reliance Big Pictures Entertainment	Hindi
3	Bodyguard	India	1.4	Reliance Big Pictures Entertainment	Hindi
4	Zindagi Na Milegi Dobara	India	0.9	Eros International	Hindi
5	Patiala House	India/UK	0.7	B4U Network	Hindi
6	Ready	India	0.6	Eros International	Hindi
7	Desi Boyz	India/UK	0.6	Eros International	Hindi
8	Yamla Pagla Deewana	India	0.5	Eros International	Hindi
9	Delhi Belly	India	0.5	UTV Motion Pictures	Hindi
10	Mere Brother Ki Dulhan	India	0.5	Yash Raj Films	Hindi

Source: Rentrak, BBFC, IMDb, BFI RSU analysis.

Note: Figures as at 12 February 2012.

Table 5.7 shows the 10 highest grossing non-English language films since 2001. The top film is *The Passion of the Christ* (£11.1 million), followed by *Crouching Tiger*, *Hidden Dragon* (£9.4 million). There are three Mandarin and three Spanish films in the top 10, but only one French language title.

Table 5.7 Top 10 non-English language films, 2001–2011

	Film	Language	UK box office total (£ million)	Distributor	Year of release
1	The Passion of the Christ	Aramaic/Latin/Hebrew	11.08	Icon	2004
2	Crouching Tiger, Hidden Dragon	Mandarin	9.37	Sony Pictures	2001
3	Amélie	French	5.01	Momentum/Alliance	2001
4	Apocalypto	Mayan	4.11	Icon	2007
5	Hero	Mandarin	3.82	Walt Disney	2004
6	House of Flying Daggers	Mandarin	3.78	Pathé	2004
7	Volver	Spanish	2.88	Pathé	2006
8	The Motorcycle Diaries	Spanish	2.75	Pathé	2004
9	Pan's Labyrinth	Spanish	2.72	Optimum*	2006
10	The Lives of Others	German	2.70	Lions Gate	2007

Source: Rentrak, BFI RSU analysis.

* Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

5.4 Documentaries

In all, 68 feature documentaries were released at the UK box office in 2011, representing 12% of theatrical releases. They earned £11.1 million in total, around 1% of the overall box office gross. The most successful documentary of the year was *Senna*, which earned £3.2 million, the highest ever gross for a British documentary and the second highest total for any feature documentary released in the UK. There were four other new entries in the chart (Table 5.8) including three documentaries which used 3D to good effect – Richard de Aragues's *TT3D: Closer to the Edge*, Wim Wenders' *Pina* and Werner Herzog's *Cave of Forgotten Dreams*.

The highest grossing non-music feature documentary of all time at the UK box office, Michael Moore's *Fahrenheit 9/11*, grossed £6.5 million in 2004. French natural history documentary *March of the Penguins* is in third place with £3.1 million and 2003 UK film *Touching the Void* is at number four with £2.6 million.

Table 5.8 Top 20 non-concert feature documentaries at the UK box office, 2001–2011

	Title	Country of origin	Year of release	Box office gross (£)	Widest point of release (sites)	Distributor
1	Fahrenheit 9/11	USA	2004	6,545,552	200	Optimum*
2	Senna	UK/USA	2011	3,173,053	358	Universal
3	March of the Penguins	France	2005	3,084,616	163	Warner Bros
4	Touching the Void	UK	2003	2,643,252	50	Pathé
5	Bowling for Columbine	USA	2002	1,667,625	37	Momentum/ Alliance
6	TT3D: Closer to the Edge	UK	2011	1,256,228	125	CinemaNX
7	Super Size Me	USA	2004	1,111,093	83	Tartan
8	An Inconvenient Truth	USA	2006	935,770	68	Paramount
9	Man on Wire	UK/USA	2008	879,377	43	Icon
10	Etre et Avoir	France	2003	708,116	15	Tartan
11	Pina	Germany/ France	2011	666,263	26	Artificial Eye
12	Cave of Forgotten Dreams	Canada	2011	616,533	39	Picturehouse
13	Spellbound	USA	2003	484,540	17	Metrodome
14	The September Issue	USA	2009	427,767	18	Momentum/ Alliance
15	Capturing the Friedmans	USA	2004	388,238	26	Tartan
16	Sicko	USA	2007	378,669	166	Optimum*
17	Inside Job	USA	2011	324,977	24	Sony Pictures
18	Exit Through the Gift Shop	UK/USA	2010	317,335	41	Revolver
19	The Corporation	Canada	2004	296,234	20	Metrodome
20	Of Time and the City	UK	2008	245,189	25	BFI

Source: BFI RSU analysis of Rentrak data.

* Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

Notes:
The table does not include music documentaries, IMAX-only documentaries and shorts.
Based on box office data for 2001–2011.
Fahrenheit 9/11 is regarded as the highest grossing feature documentary of all time because, even with price inflation, it is unlikely that any documentary films before 1989 will have earned more in nominal terms.

Several concert performance documentaries, most in 3D, have been released theatrically over the last four years (Table 5.9). The highest grossing of these, *Michael Jackson's This Is It*, earned almost £9.8 million in 2009. Three 2011 releases feature in the list of the highest grossing titles – *Justin Bieber: Never Say Never, Glee: The 3D Concert* and *Eyes Wide Open 3D* featuring the UK group JLS.

Table 5.9 Top concert documentaries at the UK box office, 2008–2011

	Title	Country of origin	Year of release	Box office gross (£)	Widest point of release (sites)	Distributor
1	Michael Jackson's This Is It	USA	2009	9,795,960	498	Sony Pictures
2	Justin Bieber: Never Say Never	USA	2011	2,317,670	388	Paramount
3	Hannah Montana/Miley Cyrus: Best of Both Worlds	USA	2008	799,109	65	Walt Disney
4	U2 3D	USA	2008	725,893	67	Revolver
5	Glee: The 3D Concert	USA	2011	711,842	335	20th Century Fox
6	Shine a Light	USA/UK	2008	697,320	159	20th Century Fox
7	Eyes Wide Open 3D	UK	2011	510,536	210	Omniverse
8	Jonas Brothers: The 3D Concert	USA	2009	249,534	169	Walt Disney

Source: BFI RSU analysis of Rentrak data.

5.5 Re-releases

According to Rentrak, 32 re-released titles accounted for 6% of theatrical releases in 2011 and generated £13.8 million (1.2% of the total gross box office). However, not all box office revenues for re-releases are tracked by Rentrak, which primarily focuses on first-run films. Some additional revenue for films which tend to be booked for a limited time into specialised cinemas long after their initial release is missing from this analysis, so the actual box office share is likely to be greater.

Table 5.10 highlights the top 20 re-releases at UK cinemas over the last 11 years. Re-releases in 3D take five of the top 20 places, with 2011's re-release of Walt Disney's *The Lion King* leading the way with £12.4 million, followed by *Toy Story* in 2009 and its sequel *Toy Story 2* in 2010 which both grossed over £2 million. The 3D version of *Tim Burton's The Nightmare Before Christmas* appears twice in the list: it grossed £647,000 during its 2006 re-release and £329,000 in 2007.

The chart features an interesting mix of genres. Stanley Kubrick's *A Clockwork Orange* grossed £2.1 million in 2000 and Steven Spielberg's 20th anniversary re-release of *E.T.* grossed a similar amount in 2002, Ridley Scott's *Alien: The Director's Cut* grossed over £500,000 in 2003, while Luchino Visconti's *The Leopard* earned £347,000 from its limited release in the same year and a further £106,000 in 2010. Also in 2010, the 25th anniversary re-release of sci-fi comedy *Back to the Future* grossed over £1.1 million.

Table 5.10 Top 20 re-releases at the UK box office, 2000–2011

	Title (year of original release)	Country of origin	Year of re-release	Box office gross (£)	Widest point of release (sites)	Distributor
1	The Lion King (3D re-release) (1994)	USA	2011	12,364,925	454	Walt Disney
2	A Clockwork Orange (1972)	UK	2000	2,067,302	328	Warner Bros
3	E.T. (20th anniversary) (1982)	USA	2002	2,063,690	313	UIP*
4	Toy Story (3D re-release) (1996)	USA	2009	2,017,464	251	Walt Disney
5	Toy Story 2 (3D re-release) (1999)	USA	2010	2,000,829	261	Walt Disney
6	Back to the Future (1985)	USA	2010	1,108,766	273	Universal Pictures
7	Tim Burton's The Nightmare Before Christmas 3-D (1993)	USA	2006	646,798	5	Walt Disney
8	Alien: The Director's Cut (1979)	UK/USA	2003	545,782	134	20th Century Fox
9	Jurassic Park (1993)	USA	2011	511,258	277	Universal
10	Apocalypse Now Redux (1979)	USA	2001	455,335	22	Walt Disney
11	The Leopard (1963)	Italy/ France	2003	346,807	5	BFI
12	It's a Wonderful Life (1946)	USA	2007	329,891	33	Park Circus
13	Tim Burton's The Nightmare Before Christmas 3-D (1993)	USA	2007	328,759	44	Walt Disney
14	2001: A Space Odyssey (1968)	UK/USA	2001	326,496	4	Warner Bros
15	Breakfast at Tiffany's (1961)	USA	2001	313,443	5	BFI
16	A bout de souffle (1960)	France	2000	173,301	5	Optimum**
17	This is Spinal Tap (1984)	USA	2000	166,203	22	Optimum**
18	Amadeus (Director's Cut) (1984)	USA	2002	145,234	8	Warner Bros
19	Ghostbusters (1983)	USA	2011	128,821	73	Park Circus
20	Metropolis (1927)	Germany	2010	128,671	44	Eureka Entertainment

Source: BFI RSU analysis of Rentrak data.

* Until 2006 Paramount and Universal distributed jointly as UIP.
** Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

- For more on the box office see Chapter 1 (page 8)
- For more on 3D films see Chapter 2 (page 18)
- For more on genre and BBFC classification see Chapter 4 (page 31)

Chapter 6:

UK films internationally

UK films shared 17% of the $33 billion worldwide gross box office in 2011, with the final instalment of the Harry Potter story, ***Harry Potter and the Deathly Hallows: Part 2***, the top film of the year. Oscar®-winner ***The King's Speech*** was the highest ranked UK independent film, earning over $414 million.

Facts in focus:

The UK share of the global theatrical market in 2011 was 17% ($5.6 billion), up from 14% ($4.5 billion) in 2010. Independent UK films accounted for 3% of this share, at a value of $900 million.

Harry Potter and the Deathly Hallows: Part 2 was the best performing UK film at the worldwide box office, earning over $1.3 billion in 2011.

UK films represented 8% of releases at the North American box office (9% in 2010), and 16.5% of the market (14% in 2010), at a value of $1,654 million.

In Europe, the top UK film was ***Harry Potter and the Deathly Hallows: Part 2*** with over 25 million admissions. Over 12 million tickets were sold across Europe for ***The King's Speech***.

6.1 UK films worldwide

UK films enjoyed considerable success at the global box office in 2011 with both studio-backed and independent films generating the highest grosses of the last decade. Global box office receipts reached $32.6 billion in the year, up 65% in 10 years (Table 6.1). UK films had a 17% share of this market, earning $5.6 billion, compared with $4.5 billion in 2010.

UK studio-backed films (UK films wholly or partly financed and controlled by US studios but featuring UK cast, crew, locations, facilities, post-production and often UK source material) earned 14.4% of the worldwide box office in 2011, with earnings of $4.7 billion, compared to $4 billion in 2010. UK independent films shared 2.8% of global revenues with earnings of $900 million in 2011, compared with $500 million in 2010.

Table 6.1 UK films global market share, 2002–2011

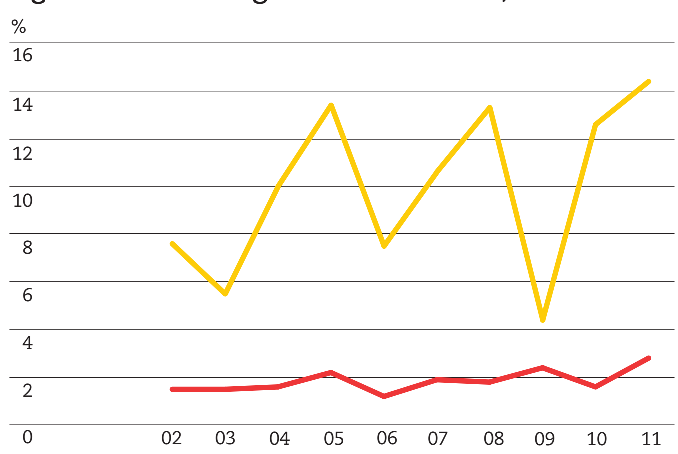
Year	UK films worldwide gross (US$ billion)	Global theatrical market (US$ billion)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
2002	1.8	19.8	9.1	7.6	1.5
2003	1.4	20.1	6.9	5.5	1.5
2004	2.9	24.9	11.6	10.0	1.6
2005	3.6	23.1	15.5	13.4	2.2
2006	2.2	25.5	8.6	7.5	1.2
2007	3.3	26.3	12.5	10.6	1.9
2008	4.2	27.8	15.1	13.3	1.8
2009	2.0	29.4	6.8	4.4	2.4
2010	4.5	31.8	14.2	12.6	1.6
2011	5.6	32.6	17.2	14.4	2.8

Source: BFI, Rentrak, MPAA, Screen Digest.

* 'Studio-backed' means backed by one of the major US film studios.

As Figure 6.1 shows, the UK market share fluctuates significantly from year to year and is highly dependent on the performance of a small number of titles. The increase in market share of independent UK films in 2011 was due mainly to the huge success of *The King's Speech* which grossed $389 million worldwide ($414 million including 2010 earnings).

Figure 6.1 UK films global market share, 2002–2011



	02	03	04	05	06	07	08	09	10	11
UK/US studio share	7.6	5.5	10.0	13.4	7.5	10.6	13.3	4.4	12.6	14.4
UK independent share	1.5	1.5	1.6	2.2	1.2	1.9	1.8	2.4	1.6	2.8

Source: BFI.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

The highest grossing UK film of 2011 was the final title in the Harry Potter series, *Harry Potter and the Deathly Hallows: Part 2*, which earned over $1.3 billion worldwide (Table 6.2). This was followed by *Pirates of the Caribbean: On Stranger Tides* which grossed $1 billion and *The King's Speech* ($389 million in 2011, $414 million overall).

Table 6.2 Top 10 UK films worldwide, 2011

	Title	Country of origin	Worldwide gross (US$ million)
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,328
2	Pirates of the Caribbean: On Stranger Tides	UK/USA	1,044
3	The King's Speech*	UK	389
4	Captain America: The First Avenger	UK/USA	369
5	X-Men: First Class	UK/USA	354
6	Sherlock Holmes: A Game of Shadows	UK/USA	237
7	Gnomeo & Juliet	UK/USA	194
8	Gulliver's Travels	UK/USA	181
9	Johnny English Reborn	UK/USA	160
10	Arthur Christmas	UK/USA	147
Total top 10			**4,403**

Source: BFI RSU.

Notes:
Worldwide gross includes the UK.
Table based on gross box office revenue in the 2011 calendar year.
* The figure for *The King's Speech* excludes money made in 2010. The cumulative total is $414 million.

The highest grossing UK independent film was *The King's Speech* which earned $389 million worldwide in 2011 (Table 6.3). This was followed by UK/France/Germany co-production *The Three Musketeers* ($132 million), *The Inbetweeners Movie* ($92 million), *Tinker*, *Tailor*, *Soldier*, *Spy* ($80 million) and *Jane Eyre* ($32 million).

Table 6.3 Top 10 UK independent films worldwide, 2011

	Title	Country of origin	Worldwide gross (US$ million)
1	The King's Speech	UK	389
2	The Three Musketeers	UK/Fra/Ger	132
3	The Inbetweeners Movie	UK	92
4	Tinker, Tailor, Soldier, Spy	UK/Fra/Ger	80
5	Jane Eyre	UK	32
6	The Eagle	UK/USA#	30
7	My Week with Marilyn	UK/USA#	27
8	One Life	UK	13
9	Horrid Henry: The Movie	UK	12
10	We Need to Talk About Kevin	UK/USA#	6
Total top 10			**813**

Source: BFI RSU.

Notes:
Worldwide gross includes the UK.
Table based on gross box office revenue in the 2011 calendar year.
The Eagle, *My Week with Marilyn* and *We Need to Talk About Kevin* were made with non-studio US support.

6.2 UK films in North America

Table 6.4 shows the country of origin of films released in the USA and Canada in 2011. The UK share of the gross box office increased from 14% in 2010 to 16.5% in 2011 with UK films representing 8% of releases in the North American market (down from 9% in 2010). The total revenue from these films stood at $1,654 million, up from $1,437 million in 2010.

Table 6.4 Country of origin of films in the USA and Canada, 2011

Country of origin	Number of releases	% of releases	Box office (US$ million)	Box office share (%)
UK independent films	37	6	121	1.2
UK studio-backed films*	15	2	1,533	15.3
UK films total	52	8	1,654	16.5
USA	354	53	8,040	80.1
Rest of the world	267	40	336	3.4
Total	**673**	**100**	**10,030**	**100.0**

Source: Rentrak, BFI RSU analysis.

* 'Studio-backed' means backed by one of the major US film studios.
Note: Percentages may not sum to 100 due to rounding.

As with the global market share, the market share for UK films in North America has fluctuated greatly over the last 10 years depending on the performance of a very small number of titles (Table 6.5). The UK share in 2011 (16.5%) was the highest recorded, up two percentage points on 2010.

Table 6.5 UK market share in North America, 2002–2011

Year	UK market share %
2002	7.2
2003	5.7
2004	11.0
2005	15.8
2006	9.2
2007	11.8
2008	16.3
2009	6.6
2010	14.2
2011	16.5

Source: Rentrak, BFI RSU analysis.

Harry Potter and the Deathly Hallows: Part 2 was the top performing UK film in North America in 2011 earning $381 million, followed by *Pirates of the Caribbean: On Stranger Tides* with $241 million (Table 6.6).

Table 6.6 Top 20 UK films at the USA and Canada box office (including co-productions), 2011

	Title	Country of origin	Box office gross (US$ million)	Distributor
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	381.0	Warner Bros
2	Pirates of the Caribbean: On Stranger Tides	UK/USA	241.1	Walt Disney
3	Sherlock Holmes: A Game of Shadows	UK/USA	184.7	Warner Bros
4	Captain America: The First Avenger	UK/USA	176.6	Paramount
5	X-Men: First Class	UK/USA	146.4	20th Century Fox
6	Gnomeo & Juliet	UK/USA	99.8	Walt Disney
7	War Horse	UK/USA	78.3	Walt Disney
8	Hugo	UK/USA	64.8	Paramount
9	Arthur Christmas	UK/USA	46.5	Sony Pictures
10	Paul	UK/USA	37.4	Universal
11	The Debt	UK/USA	31.2	Focus Features
12	The Iron Lady	UK	23.1	The Weinstein Company
13	Tinker, Tailor, Soldier, Spy	UK/Fra	22.1	Focus Features
14	Your Highness	UK/USA	21.6	Universal
15	The Three Musketeers	UK/Fra/Ger	20.4	Summit
16	The Eagle	UK/USA	19.5	Focus Features
17	One Day	UK/USA	13.8	Focus Features
18	My Week with Marilyn	UK/USA	13.4	The Weinstein Company
19	Jane Eyre	UK	11.2	Focus Features
20	Johnny English Reborn	UK/USA	8.3	Universal

Source: Rentrak, BFI RSU analysis.

Note: Table lists the gross box office for films released in the USA and Canada in 2011 and includes 2012 earnings up to 12 February 2012.

6.3 UK films in Europe

Outside the UK and Republic of Ireland, the market share for UK films in major European territories ranged from a high of 21% in Germany (including 4% for UK independent films) to 13% in France (Table 6.7).

Table 6.7 UK market share in selected European territories, 2011

Territory	Box office for UK films (€ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
Austria	24.4	19.5	16.4	3.1
France	27.0m (admissions)	13.0	10.3	2.7
Germany	196.4	21.4	17.5	3.9
Italy	110.3	17.1	13.8	3.3
Netherlands	43.2	19.1	15.8	3.3
Portugal	15.3	19.2	15.4	3.8
Spain	91.5	14.7	12.7	2.0

Source: Rentrak, BFI RSU analysis.

* 'Studio-backed' means backed by one of the major US film studios.

The top UK film in European countries (other than the UK and Republic of Ireland) in 2011 was *Harry Potter and the Deathly Hallows: Part 2* with over 25 million admissions (Table 6.8). *The King's Speech* recorded the highest admissions total for an independent UK film with over 12 million ticket sales.

Table 6.8 Top 20 UK films in other European countries, 2011

	Title	Country of origin	European admissions
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	25,573,305
2	Pirates of the Caribbean: On Stranger Tides	UK/USA	19,701,576
3	The King's Speech	UK	12,258,192
4	Hereafter*	UK/USA	5,119,541
5	Johnny English Reborn	UK/USA	4,975,855
6	Gnomeo & Juliet	UK/USA	4,848,671
7	X-Men: First Class	UK/USA	4,299,997
8	Paul	UK/USA	4,278,636
9	Sherlock Holmes: A Game of Shadows	UK/USA	3,980,292
10	The Chronicles of Narnia: The Voyage of the Dawn Treader	UK/USA	3,041,554
11	Gulliver's Travels	UK/USA	2,979,569
12	Captain America: The First Avenger	UK/USA	2,863,841
13	The Three Musketeers	UK/Fra/Ger	2,456,051
14	Arthur Christmas	UK/USA	2,375,198
15	127 Hours	UK/USA	2,335,785
16	One Day	UK/USA	1,552,393
17	Hugo	UK/USA	779,429
18	You Will Meet a Tall Dark Stranger*	UK/USA/Spa	622,870
19	The Eagle	UK/USA	575,567
20	The Debt	UK/USA	435,303

Source: European Audiovisual Observatory Lumière Database.

Notes:
Data based on admissions from 24 European countries (excluding the UK and Republic of Ireland) in the 2011 calendar year.
* *Hereafter* and *You Will Meet a Tall Dark Stranger* were released in 2010, the chart only covers admissions figures for 2011.

6.4 UK films in Latin America

UK films earned between 15% and 19% of the box office in the Latin American territories for which data are available (Table 6.9). The top performing titles included *Harry Potter and the Deathly Hallows: Part 2*, *The King's Speech* and *The Three Musketeers*.

Table 6.9 UK market share in selected Latin American countries, 2011

Territory	Box office for UK films (US$ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
Argentina	44.8	16.7	14.6	2.0
Brazil	130.3	17.0	14.9	2.1
Chile	17.4	19.1	17.8	1.2
Colombia	21.9	16.1	13.9	2.2
Mexico	134.3	16.7	15.5	1.2
Venezuela	34.0	15.1	13.9	1.2

Source: Rentrak, BFI RSU analysis.

* 'Studio-backed' means backed by one of the major US film studios.

6.5 UK films in Asia

The highest grossing UK film in Japan and South Korea was *Harry Potter and the Deathly Hallows: Part 2* with *The Three Musketeers* and *The King's Speech* the highest grossing independent films (Table 6.10).

Table 6.10 UK market share in Japan and South Korea, 2011

Territory	Box office for UK films (US$ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
Japan	315.5	18.2	15.2	3.1
South Korea	129.0	11.3	10.2	1.1

Source: Rentrak, BFI RSU analysis.

* 'Studio-backed' means backed by one of the major US film studios.

6.6 UK films in Australasia

In 2011, UK films accounted for 19% of the theatrical market in Australia and 22% in New Zealand (Table 6.11). *Harry Potter and the Deathly Hallows: Part 2* was the highest grossing UK film in both territories with *The Iron Lady* and *The Inbetweeners Movie* the two highest grossing UK independent films in Australia. *The King's Speech* was the top UK independent film in New Zealand.

Table 6.11 UK market share in Australia and New Zealand, 2011

Territory	Box office for UK films (US$ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
Australia	171.0	19.2	14.5	3.4
New Zealand	26.2	21.8	13.8	7.9

Source: Rentrak, BFI RSU analysis.

* 'Studio-backed' means backed by one of the major US film studios.

Note: Definition of 'UK film'

For the purposes of this chapter, a UK film is one which is certified as such by the UK Secretary of State for Culture, Olympics, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production or a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent. Most UK films in the analysis (including the major studio-backed films) fall into the first group – films officially certified as British.

▸ For more information on the UK and global market for filmed entertainment see Chapter 14 (page 134)
▸ For more information about the UK film economy see Chapter 21 (page 189)

Image: ***Tyrannosaur*** *courtesy of StudioCanal*

Chapter 7:

UK talent and awards

In a year when UK films topped the box office at home, UK filmmaking talent enjoyed huge success in the global box office charts and at international award ceremonies. The skills that created such films as the last Harry Potter movie, 2011's highest grossing worldwide release, and the multi Oscar®-winner ***The King's Speech***, took cinema and festival audiences by storm and showcased British culture and identity to the world.

Facts in focus:

Of the top 200 global box office successes of 2001–2011, 31 films are based on stories and characters created by UK writers. Together they have earned more than $20 billion (£12.3 billion) at the worldwide box office.

Half of the top 20 global box office successes of the last 11 years are based on novels by UK writers.

More than half of the top 200 films released worldwide since 2001 have featured UK actors in lead or prominent supporting roles.

UK directors were behind 24 of the 200 biggest films of the last 11 years with David Yates topping the box office league.

UK films and talent won 30 major film awards in 2011, with eight of these awards being won at the Oscars® and 15 at the BAFTAs. The 295 awards received from 2001–2011 represented 14% of the total of all major awards.

7.1 UK story material

The global box office performance of UK films and foreign productions which draw on UK source material is a good indicator of the international impact and exposure of British culture. Of the top 200 grossing films released worldwide between 2001 and 2011, 29 are UK qualifying films, and UK-originated story material provided the inspiration for 31 films, a feat only bettered by US story material. Collectively these 31 films have earned $20.6 billion (£12.3 billion) at the global box office.

Novels by British writers have provided the source material for 10 of the top 20 grossing films worldwide since 2001 (Table 7.1).

Table 7.1 Top 20 grossing films worldwide, 2001–2011

Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK story material (writer)
1	Avatar	USA	2,782	20th Century Fox	
2	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,328	Warner Bros	Novel by JK Rowling
3	The Lord of the Rings: The Return of the King	USA/NZ	1,119	New Line	Novel by JRR Tolkien
4	Transformers: Dark of the Moon	USA	1,117	Paramount	
5	Pirates of the Caribbean: Dead Man's Chest	USA	1,065	Buena Vista	
6	Toy Story 3	USA	1,064	Walt Disney	
7	Pirates of the Caribbean: On Stranger Tides	UK/USA	1,042	Walt Disney	
8	Alice in Wonderland	USA	1,024	Walt Disney	Novel by Lewis Carroll
9	The Dark Knight	UK/USA	1,002	Warner Bros	
10	Harry Potter and the Philosopher's Stone	UK/USA	975	Warner Bros	Novel by JK Rowling
11	Pirates of the Caribbean: At World's End	USA	961	Walt Disney	
12	Harry Potter and the Deathly Hallows: Part 1	UK/USA	955	Warner Bros	Novel by JK Rowling
13	Harry Potter and the Order of the Phoenix	UK/USA	939	Warner Bros	Novel by JK Rowling
14	Harry Potter and the Half-Blood Prince	UK/USA	934	Warner Bros	Novel by JK Rowling
15	The Lord of the Rings: The Two Towers	USA/NZ	923	New Line	Novel by JRR Tolkien
16	Shrek 2	USA	915	DreamWorks	
17	Harry Potter and the Goblet of Fire	UK/USA	896	Warner Bros	Novel by JK Rowling
18	Spider-Man 3	USA	892	Sony Pictures	
19	Ice Age: Dawn of the Dinosaurs	USA	888	20th Century Fox	
20	Harry Potter and the Chamber of Secrets	UK/USA	879	Warner Bros	Novel by JK Rowling

Source: BFI RSU.

Looking just at films based on UK story material, the top 20 grossing films adapted from stories or characters created by UK writers are listed in Table 7.2. Eighteen are adaptations of novels and short stories written by UK authors, one is based on a successful stage production and one is from an original screenplay.

Table 7.2 Top 20 grossing films worldwide based on stories and characters created by UK writers, 2001–2011

Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK story material (writer)
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,328	Warner Bros	Novel by JK Rowling
2	The Lord of the Rings: The Return of the King	USA/NZ	1,119	New Line	Novel by JRR Tolkien
3	Alice in Wonderland	USA	1,024	Walt Disney	Novel by Lewis Carroll
4	Harry Potter and the Philosopher's Stone	UK/USA	975	Warner Bros	Novel by JK Rowling
5	Harry Potter and the Deathly Hallows: Part 1	UK/USA	955	Warner Bros	Novel by JK Rowling
6	Harry Potter and the Order of the Phoenix	UK/USA	939	Warner Bros	Novel by JK Rowling
7	Harry Potter and the Half-Blood Prince	UK/USA	934	Warner Bros	Novel by JK Rowling
8	The Lord of the Rings: The Two Towers	USA/NZ	923	New Line	Novel by JRR Tolkien
9	Harry Potter and the Goblet of Fire	UK/USA	896	Warner Bros	Novel by JK Rowling
10	Harry Potter and the Chamber of Secrets	UK/USA	879	Warner Bros	Novel by JK Rowling
11	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	868	New Line	Novel by JRR Tolkien
12	Inception	UK/USA	823	Warner Bros	Original screenplay by Christopher Nolan
13	Harry Potter and the Prisoner of Azkaban	UK/USA	796	Warner Bros	Novel by JK Rowling
14	The Chronicles of Narnia: The Lion, the Witch and the Wardrobe	USA/NZ	749	Walt Disney	Novel by CS Lewis
15	Mamma Mia!	UK/USA	602	Universal	Musical book and screenplay by Catherine Johnson
16	Casino Royale	UK/USA/Cze	600	Sony Pictures	Novel by Ian Fleming
17	The War of the Worlds	USA	596	Paramount	Novel by HG Wells
18	Quantum of Solace	UK/USA	575	Sony Pictures	Based on Ian Fleming novels
19	Sherlock Holmes	UK/USA	524	Warner Bros	Based on Sir Arthur Conan Doyle novels and short stories
20	How to Train Your Dragon	USA	495	Paramount	Novel by Cressida Cowell

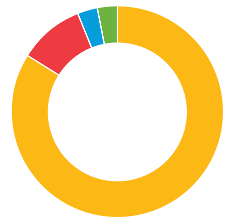
Source: BFI RSU.

Of the 31 films from the top 200 based on UK stories and characters, the majority (84%) were based on the work of new and classic authors such as Sir Arthur Conan Doyle, Ian Fleming, CS Lewis, JK Rowling and JRR Tolkien (Figure 7.1). A new entry, which went straight to the top of the list was the top grossing UK film of 2011 *Harry Potter and the Deathly Hallows: Part 2*, which was based on the novel by JK Rowling (to date the Harry Potter franchise has taken over $7.7 billion at the worldwide box office). There are three other new films in the top 200 which are based on UK story material. These are *The King's Speech*, which is based on an original screenplay by David Seidler, *Sherlock Holmes: A Game of Shadows*, based on the writings of Sir Arthur Conan Doyle and *The Chronicles of Narnia: The Voyage of the Dawn Treader*, based on the novel by CS Lewis.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 7.1 Origin of UK story material in the top 200 films at the international box office, 2001–2011

	%
Novel	84
Original screenplay	10
Comic book/graphic novel	3
Musical	3



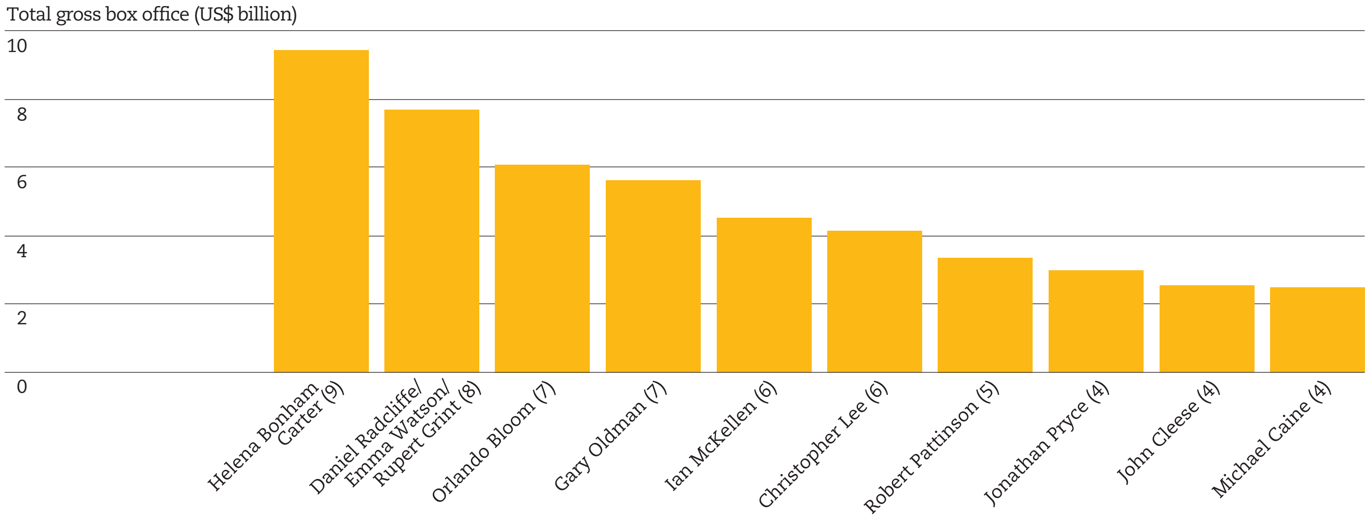
7.2 UK actors

UK acting talent is widely recognised as being among the best in the world and more than half (129) of the top 200 films at the international box office since 2001 have featured British actors in either lead/title roles (40) or in the supporting cast (89). The prominent role played by UK actors in many of the major blockbusters of the last decade is reflected in Figure 7.2 which shows the top 12 British actors based on appearances in the top 200 films. The Harry Potter franchise features heavily in this chart.

Helena Bonham Carter is at the top of the list, as she has appeared in nine of the top 200 films, with four of the nine being Harry Potter films. Second in the list are the regular stars of the Harry Potter franchise (only the three main performers are shown in Figure 7.2 but several others have appeared in all seven films). In third place is Orlando Bloom who has been in seven of the top 200 films including the Lord of the Rings trilogy. Gary Oldman has also appeared in seven of the top 200 films including four Harry Potter films and two films in the Batman franchise (*Batman Begins* and *The Dark Knight*).

Ian McKellen and Christopher Lee have both made six appearances in the top 200 films having featured in some of the biggest franchises in cinema history such as Lord of the Rings, the Star Wars prequels and the X-Men films. Robert Pattinson's roles in all of the Twilight films and in *Harry Potter and the Goblet of Fire* means that he has appeared in five of the top 200 films. Jonathan Pryce has appeared in four of the top 200 films, three times in the Pirates of the Caribbean franchise, as well as in *G.I. Joe: The Rise of Cobra*. John Cleese's role in two Harry Potter films puts him in the list with four appearances. He also appeared in *Die Another Day* and *Charlie's Angels: Full Throttle*. Michael Caine also has four appearances for two Batman films, *Austin Powers in Goldmember* and *Inception*.

Figure 7.2 Top 12 UK actors featured in the top 200 films at the worldwide box office, 2001–2011 (number of appearances in brackets)



	Helena Bonham Carter (9)	Daniel Radcliffe/ Emma Watson/ Rupert Grint (8)	Orlando Bloom (7)	Gary Oldman (7)	Ian McKellen (6)	Christopher Lee (6)	Robert Pattinson (5)	Jonathan Pryce (4)	John Cleese (4)	Michael Caine (4)
Total gross box office (US$ billion)	9.44	7.69	6.09	5.63	4.53	4.14	3.36	2.98	2.54	2.49

Source: BFI RSU.

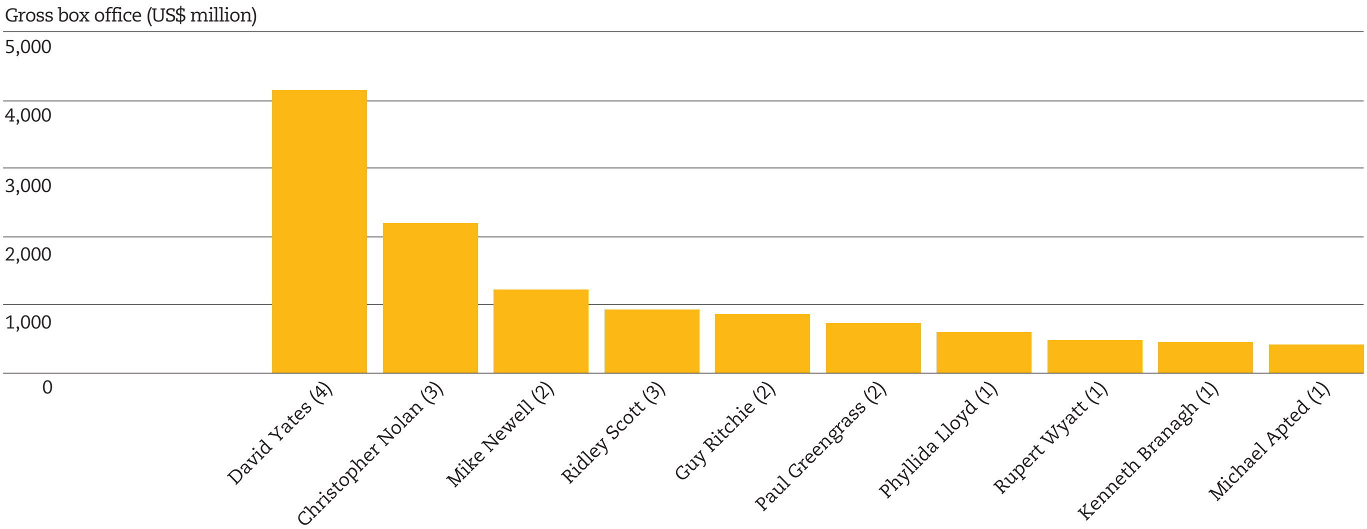
Note: Includes actors who have made four or more appearances in the top 200 films, either in lead/title role or supporting role (not including voices in animated films).

7.3 UK directors

Twenty-four of the 200 highest grossing films at the worldwide box office have been directed by British directors (Figure 7.3 and Table 7.3). David Yates's four Harry Potter films (*Harry Potter and the Order of the Phoenix, Harry Potter and the Half-Blood Prince* and *Harry Potter and the Deathly Hallows: Parts 1 and 2*) made him the British director with the most commercial success in recent years, with total box office takings of $4.16 billion. Christopher Nolan is second having directed *Batman Begins, The Dark Knight* and *Inception* which have combined box office takings of $2.2 billion. The third place is taken by Mike Newell who directed *Harry Potter and the Goblet of Fire* and *Prince of Persia: The Sands of Time*, which together grossed $1.23 billion. Ridley Scott is in fourth place, with three films (*Kingdom of Heaven, Hannibal* and *American Gangster*) which grossed over $936 million between them. Guy Ritchie and Paul Greengrass rank next with combined grosses of $859 million and $731 million respectively for their Sherlock Holmes and Jason Bourne films. Two women feature in the top 200, Phyllida Lloyd for *Mamma Mia!* ($602 million) and Beeban Kidron for *Bridget Jones: The Edge of Reason* ($255 million).

Danny Boyle's *Slumdog Millionaire* ($377 million) is one of only two independent films in the list. The other is Tom Hooper's *The King's Speech*, a new entry to the top 200 with a worldwide gross of $414 million to date. Four other British directors appear for the first time in the list. Rupert Wyatt's *Rise of the Planet of the Apes* has grossed $483 million, Kenneth Branagh's *Thor* has taken $448 million, *The Chronicles of Narnia: The Voyage of the Dawn Treader* directed by Michael Apted has grossed $416 million and Matthew Vaughn's *X-Men: First Class* has taken $353 million at the worldwide box office.

Figure 7.3 Top 10 UK directors based on top 200 grossing films at the global box office, 2001–2011 (numbers of films in brackets)



	David Yates (4)	Christopher Nolan (3)	Mike Newell (2)	Ridley Scott (3)	Guy Ritchie (2)	Paul Greengrass (2)	Phyllida Lloyd (1)	Rupert Wyatt (1)	Kenneth Branagh (1)	Michael Apted (1)
Worldwide gross from films in top 200 (US$ million)	4,156	2,199	1,228	936	859	731	602	483	448	416

Source: BFI RSU.

Table 7.3 UK directors from the top 200 films at the global box office and their films, 2001–2011

Director	Film(s)	Total gross box office (US$ million)
David Yates	Harry Potter and the Order of the Phoenix	
	Harry Potter and the Half-Blood Prince	
	Harry Potter and the Deathly Hallows: Part 1	
	Harry Potter and the Deathly Hallows: Part 2	4,156
Christopher Nolan	Batman Begins, The Dark Knight	
	Inception	2,199
Mike Newell	Harry Potter and the Goblet of Fire	
	Prince of Persia: The Sands of Time	1,228
Ridley Scott	American Gangster, Hannibal, Robin Hood	936
Guy Ritchie	Sherlock Holmes	
	Sherlock Holmes: A Game of Shadows	859
Paul Greengrass	The Bourne Supremacy, The Bourne Ultimatum	731
Phyllida Lloyd	Mamma Mia!	602
Rupert Wyatt	Rise of the Planet of the Apes	483
Kenneth Branagh	Thor	448
Michael Apted	The Chronicles of Narnia: The Voyage of the Dawn Treader	416
Tom Hooper	The King's Speech	414
Danny Boyle	Slumdog Millionaire	377
Matthew Vaughn	X-Men: First Class	353
Beeban Kidron	Bridget Jones: The Edge of Reason	255

Source: BFI RSU.

7.4 Awards for UK films and talent

UK films and British talent, in front of and behind the camera, consistently enjoy major award recognition. Table 7.4 illustrates the number of awards won since 2001 by UK films and individuals at two major international award ceremonies (the Academy Awards® and BAFTA Film Awards) and the major international film festivals (Berlin, Cannes, Sundance, Toronto and Venice). In all, there were 295 award-winners, representing 14% of the awards made.

Table 7.4 Awards for British films and talent, 2001–2011

Year	Number of UK award winners*	UK share %
2001	25	14
2002	24	15
2003	22	13
2004	22	13
2005	23	14
2006	25	14
2007	32	15
2008	32	15
2009	36	17
2010	24	12
2011	30	15
Total	**295**	**14**

Source: BFI.

* Awards include the Academy Awards® and BAFTA Film Awards, as well as Berlin, Cannes, Sundance, Toronto and Venice festivals.

Awards and nominations are an important tool for raising the critical reputation and international profile of UK film. UK films and talent won 30 major academy and festival awards in 2011, 15% of the total number conferred. The awards and winners are shown in Table 7.5.

At the 2011 Oscars®, *The King's Speech* won four awards including Best Picture. It also won the Best Director award (Tom Hooper), Best Leading Actor (Colin Firth) and Best Original Screenplay (David Seidler). There were also awards for British talent associated with other films. Christian Bale won Best Supporting Actor for *The Fighter*, Dave Elsey won the Make Up award (with Rick Baker) for *The Wolfman* and Atticus Ross won the Best Original Score award (with Trent Reznor) for *The Social Network*. One of *Inception's* four Oscars® was for Best Visual Effects, which went to the British team of Paul Franklin, Chris Corbould, Andrew Lockley and Peter Bebb.

In addition to its success at the Academy Awards®, *The King's Speech* was the most successful film at the BAFTAs with seven wins, including Best Film and Outstanding British Film. Of its five awards to individuals, three went to British talent. Helena Bonham Carter won Best Supporting Actress and, matching their successes at the Oscars®, Colin Firth won Best Leading Actor and David Seidler won Best Original Screenplay. *The King's Speech* also won two awards for non-British talent. Geoffrey Rush won Best Supporting Actor and Alexandre Desplat won the Best Music award.

At the Sundance Festival *Tyrannosaur* won three awards. Paddy Considine won the World Cinema Directing Award: Dramatic, and both Olivia Colman and Peter Mullan won World Cinema Special Jury Prizes: Dramatic for Breakout Performances. Three other awards went to British films or talent at the Sundance Festival. Felicity Jones won the Special Jury Prize: Dramatic for her role in *Like Crazy*, James Marsh won the World Cinema Directing Award: Documentary for *Project Nim* and the British documentary *Senna* won the World Cinema Audience Award: Documentary.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Of the 30 awards to British films and talent in 2011, Helena Bonham Carter's BAFTA award and the awards to Felicity Jones and Olivia Colman at the Sundance Festival were the only three awards won by British women or by British films made by women, compared with 10 from 24 awards in 2010. (The list does not include non-British wins for UK films such as the Golden Osella Outstanding Technical Contribution Award won by Irish cinematographer Robbie Ryan for Andrea Arnold's *Wuthering Heights* at the Venice Festival.)

However, one other British female filmmaker did collect an award for her film, but this award is not included in the list as the award was for the film rather than the person, and the film is American. Erica Dunton collected the Audience Award – Best of Next at the Sundance Festival for her film *To.get.her*. Another British-born filmmaker not included in the list because an award was made to the film not an individual is John Michael McDonagh who wrote and directed the Irish film *The Guard* which won a Special Mention for Best First Feature at the Berlin Festival.

Table 7.5 UK award winners, 2011

Award ceremony/festival	Award	Recipient	Title
Academy Awards® 27 February 2011	Best Picture	Film Award presented to Iain Canning, Emile Sherman and Gareth Unwin	The King's Speech
	Actor in a Leading Role	Colin Firth	The King's Speech
	Actor in a Supporting Role	Christian Bale	The Fighter
	Directing	Tom Hooper	The King's Speech
	Make-Up	Dave Elsey (with Rick Baker)	The Wolfman
	Music (Original Score)	Atticus Ross (with Trent Reznor)	The Social Network
	Visual Effects	Paul Franklin, Chris Corbould, Andrew Lockley and Peter Bebb	Inception
	Writing (Original Screenplay)	David Seidler	The King's Speech
BAFTA Film Awards 13 February 2011	Academy Fellowship	Sir Christopher Lee	
	Outstanding British Contribution to Cinema	The Harry Potter Films Award presented to JK Rowling and David Heyman	
	Best Film	Film Award presented to Iain Canning, Emile Sherman and Gareth Unwin	The King's Speech
	Outstanding British Film	Film Award presented to Tom Hooper, David Seidler, Iain Canning, Emile Sherman and Gareth Unwin	The King's Speech
	Outstanding debut by a British writer, director or producer	Chris Morris	Four Lions
	Original Screenplay	David Seidler	The King's Speech
	Leading Actor	Colin Firth	The King's Speech
	Supporting Actress	Helena Bonham Carter	The King's Speech
	Cinematography	Roger Deakins	True Grit
	Production Design	Guy Hendrix Dyas (with Larry Dias and Doug Mowatt)	Inception

Award ceremony/festival	Award	Recipient	Title
	Special Visual Effects	Chris Corbould, Paul Franklin, Andrew Lockley and Peter Bebb	Inception
	Make-Up and Hair	Paul Gooch (with Valli O'Reilly)	Alice in Wonderland
	Short Animation	Film Award presented to Michael Please	The Eagleman Stag
	Short Film	Film Award presented to Paul Wright and Poss Kondeatis	Until the River Runs Red
	Orange Wednesdays Rising Star Award	Tom Hardy	
Sundance Film Festival 21–31 January 2011	World Cinema Audience Award: Documentary	Film Award presented to Asif Kapadia	Senna
	World Cinema Directing Award: Documentary	James Marsh	Project Nim
	World Cinema Directing Award: Dramatic	Paddy Considine	Tyrannosaur
	World Cinema Special Jury Prize: Dramatic for Breakout Performances	Olivia Colman	Tyrannosaur
	World Cinema Special Jury Prize: Dramatic for Breakout Performances	Peter Mullan	Tyrannosaur
	Special Jury Prize: Dramatic	Felicity Jones	Like Crazy
Venice Film Festival 31 August – 10 September 2011	FIPRESCI Prize: Best Film	Film Award presented to Steve McQueen	Shame

Source: BFI.

Note: No awards were made to British talent or films at Berlin, Cannes or Toronto in 2011.

- For more details on the film distribution sector in 2011 see Chapter 9 (page 86)
- For more information about the exhibition sector in 2011 see Chapter 10 (page 94)
- For more background on film production in 2011 see Chapter 17 (page 155)

Chapter 8:

Theatrical release history and comparative performance of UK films

A successful theatrical release is seen as key to a film's long-term prospects, and competition for the available release slots is fierce. However, more than half of the domestic UK films which are not released theatrically do reach an audience by being shown at other venues or becoming available on other platforms.

Facts in focus:

More than half (54%) of domestic UK films with budgets of £500,000 or more shot between 2003 and 2009 were released in at least one of 19 territories within two years of principal photography, accounting for 71% of the total UK film production budget over this period.

The percentage of films achieving a theatrical release increased with the level of budget – just 14% of films with budgets of less than £500,000 achieved a theatrical release in at least one of 19 territories within two years of principal photography.

For higher budget (£5 million or more) domestic UK films the highest proportion of the international box office came from the USA and Canada; for films with lower budgets the highest percentage of box office came from the UK and Republic of Ireland.

Using an international box office to budget ratio of 2 or more as an approximate measure of profitability, overall 11% of domestic UK films with budgets of £500,000 or more produced from 2003 to 2009 were profitable.

Of the films which do not achieve a theatrical release, 55% become available, or get shown, on other platforms but, for low budget films, 41% are shown only at film festivals and so are seen by a relatively small number of viewers.

8.1 Theatrical release of UK films

This chapter looks at the theatrical release performance of UK domestic films in the UK and internationally. UK domestic films are features made by UK production companies that are produced wholly or partly in the UK. Creative input to domestic films is from the UK producers, but some of the films are made with financial backing from the major US studios. In previous Yearbooks, the performances of different categories of UK films have been compared, but the present chapter compares UK domestic films of different budget levels.

Two types of analysis are presented: release history of domestic UK films by year of production, and release history of domestic UK films by budget level. Comprehensive data on films with budgets of less than £500,000 are available only from 2008 onwards, so the analysis by production year includes only films with budgets of £500,000 or more, but the analysis by budget levels includes all domestic UK films.

The reference period is the production years 2003 to 2009. Production year is defined as the year in which principal photography begins. We restricted our analysis to these years because comprehensive production tracking data are only available from 2003, and 2009 is the latest production year included as it may take a number of years for a film to be theatrically released, as Figure 8.1 shows.

It should be borne in mind that the number of effective theatrical release slots each year is tightly constrained, there being only 52 weekends per year. Films can also be released on DVD/Blu-ray, shown on terrestrial or multi-channel television, or downloaded or streamed over different digital platforms.

The theatrical release territories included in this analysis are: Argentina, Australia, Austria, Brazil, Chile, Colombia, France, Germany, Italy, Japan, Korea, Mexico, Netherlands, New Zealand, Portugal, UK and Republic of Ireland (one territory), USA and Canada (one territory) and Venezuela. These 19 territories are covered because they account for the majority (75% in 2011, according to *Screen Digest Cinema Intelligence*) of the global theatrical market, and because title-matched box office data for these territories are available[1].

8.2 Time to first theatrical release

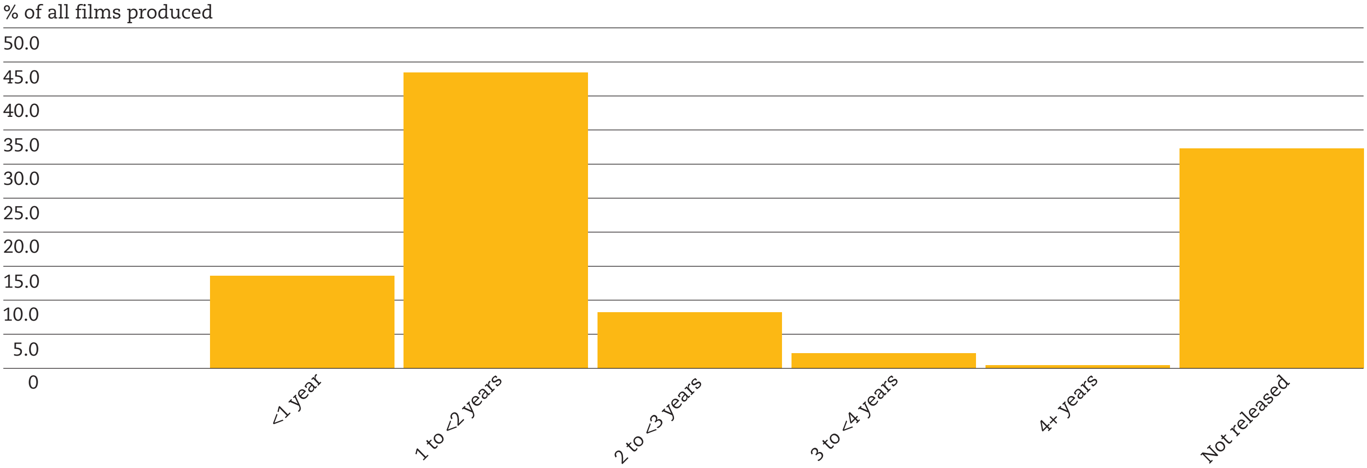
Figure 8.1 shows the time taken from principal photography to first release in at least one of the above 19 territories for 267 domestic UK films with budgets of £500,000 or more shot between 2003 and 2007. Films with budgets of less than £500,000 are excluded from Figure 8.1 because comprehensive information on these films is available only for 2008 onwards. However, the low budget films are included in the sections which look at the performance of domestic UK films by budget level.

Overall, nearly three fifths of the higher budget films produced between 2003 and 2007 were released within two years, but a significant minority (10%) took longer than two years to get a first theatrical release. This means that the closer the time of production is to the present day, the lower the proportion of films which have been released. For this reason, the analysis of release history is limited to films shot up to the end of 2009 and 'release' is defined as a theatrical release within two years of principal photography. This will underestimate the final release rate by about 10%, but provides a common measure for comparing films produced in different years.

1 For Colombia and Venezuela box office data are available only from early 2007, so it is possible that some of the earlier films were released in these territories but were missed from the present study. The earliest box office data for Portugal, Netherlands and Japan are for August 2006, September 2004 and January 2004 respectively, so it is also possible that some of the films produced before these dates are wrongly recorded as not having been released in these territories. For the other 14 territories the box office data are available from before 2003.

*Image: **Slumdog Millionaire** courtesy of Pathé*

Figure 8.1 Elapsed time from principal photography to first international release of UK films shot in 2003–2007



	<1 year	1 to <2 years	2 to <3 years	3 to <4 years	4+ years	Not released
% of all films produced	13.5	43.4	8.2	2.2	0.4	32.2

Source: Rentrak, BFI.

Note: Release rates up to the end of 2011. Here 'international' release means a release in any of 19 Rentrak territories, including the UK and Republic of Ireland.

8.3 Release rate of UK films in the UK and Republic of Ireland

Of the 438 domestic UK films (with budgets of £500,000 or more) shot between 2003 and 2009, 215 (49%) were released theatrically in the UK and Republic of Ireland within two years of principal photography (Table 8.1). Films produced in 2007 and 2009 had the lowest release rate (44%) while those made in 2003 had the highest release rate (63%). The overall release rate would have been 59% (260 films) without the two-year follow-up limit (see section 8.3).

Table 8.1 also shows that released films tend to have higher budgets than the unreleased ones. The median budget of the released films over this period was £2.4 million which is twice the median for the unreleased films. Films which were released theatrically accounted for 67% of the total film budget over this period. The lowest rate was in 2008 when films which achieved a theatrical release accounted for just under half of the year's total domestic film production budget.

Table 8.1 Domestic UK films release rates in the UK and Republic of Ireland, production years 2003–2009

	2003	2004	2005	2006	2007	2008	2009	Total
Number released within two years of principal photography	29	20	30	28	31	38	39	215
% released within two years of principal photography	63.0	50.0	56.6	49.1	43.7	46.3	43.8	49.1
Number of films produced	46	40	53	57	71	82	89	438
Median budget of released films (£ million)	3.8	3.3	2.2	2.4	1.9	1.9	2.6	2.4
Median budget of unreleased films (£ million)	1.5	1.9	1.3	1.0	1.1	1.4	1.0	1.2
Median budget of all films (£ million)	2.9	2.3	2.0	1.6	1.2	1.7	1.4	1.7
Released films' % of total budget	81.3	68.2	69.6	79.3	59.1	49.6	65.1	67.0

Source: Rentrak, DCMS, BFI.

Notes:
Only films with budgets of £500,000 or more are included in the table.
Release rates subject to two-year release limit (see section 8.2).
A film is considered to be released theatrically if it was recorded as such by Rentrak.

8.4 Release rate of domestic UK productions by different budget levels in the UK and Republic of Ireland

Table 8.2 shows that over the reference period, the higher the budget for a domestic UK film, the more likely it is to achieve a theatrical release in the UK and Republic of Ireland within two years of principal photography. Just 13% of films with budgets of less than £500,000 were released theatrically, compared with 83% of films with budgets of £10 million or more. However, as mentioned earlier in the chapter, some domestic UK films are made with financial support from the major US studios, which would also distribute the films. Two thirds of the films in the highest budget band had financial support from one of the major studios. Two of the five films in this budget band which were not released in the UK were supported by one of the studios.

Table 8.2 Release rates of domestic UK films in the UK and Republic of Ireland by budget level, production years 2003–2009

	Budget					
	<£0.5 million	£0.5–£2 million	£2–£5 million	£5–£10 million	£10+ million	Total
Number released within two years of principal photography	59	85	73	32	25	274
% released	12.7	35.4	59.3	71.1	83.3	30.3
Number of films produced	466	240	123	45	30	904
Median budget of released films (£ million)	0.2	1.1	2.9	6.3	16.4	1.8

Source: Rentrak, DCMS, BFI.

Notes:
Release rates subject to two-year release limit (see section 8.2).
A film is considered to be released theatrically if it was recorded as such by Rentrak.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

8.5 Box office performance of domestic UK productions by budget level in the UK and Republic of Ireland

Table 8.3 shows the median box office takings for domestic UK films by budget level. The table shows that the median box office increases with the level of budget. The median UK box office for the 59 domestic UK films shot between 2003 and 2009 with budgets of less than £500,000 was £4,000, compared with a median box office of £5.4 million for the 25 films with budgets of £10 million or more. However, it is likely that the distributors of the higher budget films spend more on promotion and advertising of the films, which will have an impact on box office takings. This is particularly true of the higher budget films made and distributed with financial support from the major US studios.

Table 8.3 Box office performance of domestic UK productions in the UK and Republic of Ireland, by budget level, production years 2003–2009 (ranked by median box office)

Budget level	Median (£ 000)	Mean (£ 000)	Number of films released
£10+ million	5,350	8,763	25
£5 – £10 million	1,042	4,273	32
£2 – £5 million	386	1,019	73
£0.5 – £2 million	39	252	85
<£0.5 million	4	36	59
Total	**137**	**1,656**	**274**

Source: Rentrak, DCMS, BFI.

Notes:
Figures shown are of UK films released in the UK and Republic of Ireland within two years of principal photography (see section 8.2).
Box office figures valid to the end of 2011.
The median (the value at which equal numbers of films have higher and lower box office values) is a better representation of the 'middle' of the distribution of box office revenues than the mean which tends to have an upward skew due to a small number of high box office films. Means are also shown in the table for reference.

8.6 International release rates of UK films (19 territories)

Table 8.4 shows that 54% of all domestic UK films (with budgets of £500,000 or more) shot over the years 2003 to 2009 were released theatrically in one or more of 19 territories within two years of the start of principal photography. The overall release rate would have been 63% (276 films) without the two-year follow-up limit (see section 8.2). The lowest rate was 44% for films produced in 2009, and the highest rate was 67% for films produced in 2003. However, although 2009 had the lowest rate and 2003 had the highest rate, looking at the numbers of films released, more 2009 productions than 2003 productions were released (39 from 2009 and 31 from 2003).

Overall, the films which achieved an international release accounted for 71% of the aggregate budgets of all films produced in the period. This, together with Table 8.1, provides some reassurance that a high proportion of the total UK film budget and associated tax relief are attached to films which gain theatrical releases.

Table 8.4 International release rates of domestic UK films, production years 2003–2009

	2003	2004	2005	2006	2007	2008	2009	Total
Number released within two years of principal photography	31	23	33	29	36	44	39	235
% released within two years of principal photography	67.4	57.5	62.3	50.9	50.7	53.7	43.8	53.7
Number of films produced	46	40	53	57	71	82	89	438
Median budget of released films (£ million)	3.8	3.4	2.3	2.4	2.0	1.9	2.6	2.4
Median budget of unreleased films (£ million)	1.0	1.7	1.2	1.0	1.1	1.3	1.0	1.1
Median budget of all films (£ million)	2.9	2.3	2.0	1.6	1.2	1.7	1.4	1.7
Released films' % of total budget	85.4	75.7	80.7	79.9	65.0	53.8	65.1	71.3

Source: Rentrak, DCMS, BFI.

Notes:
Only films with budgets of £500,000 or more are included in the table.
Release rates are calculated two years after principal photography (see section 8.2).
A film is 'internationally released' if it was recorded as such in any one of the 19 Rentrak territories monitored (see section 8.1 for the list).

8.7 International release rates of domestic UK productions at different budget levels

Table 8.5 shows that, as with UK releases, international release rates increased with increasing budget levels. Just 14% of films with budgets of less than £500,000 achieved a theatrical release in at least one of the 19 Rentrak territories, compared with 87% of films with budgets of £10 million or more. Two thirds of the films in the highest budget band had financial support from one of the major US studios, including two of the four non-released films.

It is possible that the 'true' international release rates could be higher than indicated by Table 8.5. For example, many European countries, including all Nordic countries, where domestic UK films might be expected to be released, are missing from our box office coverage.

Table 8.5 International release rates of domestic UK films by budget level, production years 2003–2009

	Budget					
	<£0.5 million	£0.5–£2 million	£2–£5 million	£5–£10 million	£10+ million	Total
Number released within two years of principal photography	65	92	83	34	26	300
% released	13.9	38.3	67.5	75.6	86.7	33.2
Number of films produced	466	240	123	45	30	904
Median budget of released films (£ million)	0.2	1.1	2.9	6.3	15.9	1.8

Source: Rentrak, DCMS, BFI.

Notes:
Release rates are calculated two years after principal photography (see section 8.2).
A film is 'internationally released' if it was recorded as such in any one of the 19 Rentrak territories monitored (see section 8.1 for the list).

8.8 International box office performance of domestic UK productions by budget level

As with box office earnings in the UK, the average international box office takings for domestic UK films increased with increasing budget levels. The median international box office for films with budgets of less than £500,000 was $8,000, compared with $37 million for films with budgets of £10 million or more. Note that the box office data cover only 19 international territories (including the UK and Republic of Ireland). The global median box office for domestic UK films would be higher than the figures presented here.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 8.6 Box office (US$) for domestic UK films released in at least one of 19 territories by budget level, production years 2003–2009 (ranked by median box office)

Budget level	Median (US$ 000)	Mean (US$ 000)	Number of films released
£10+ million	36,951	54,276	26
£5 – £10 million	4,765	28,116	34
£2 – £5 million	1,151	3,567	83
£0.5 – £2 million	138	914	92
<£0.5 million	8	96	65
Total	**377**	**9,178**	**300**

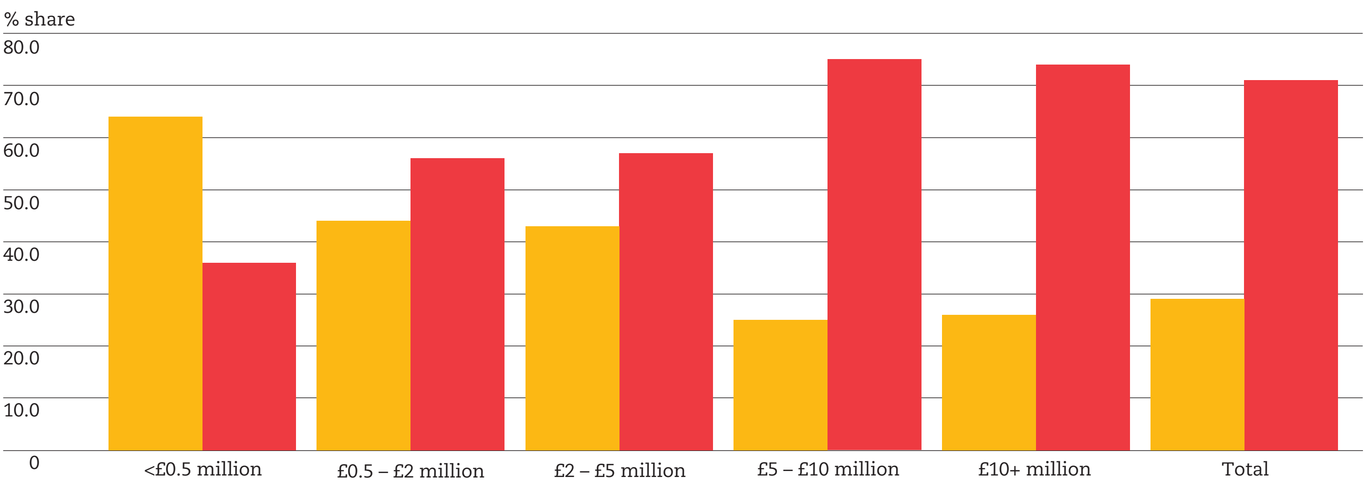
Source: Rentrak, DCMS, BFI.

Notes:
Figures shown are for UK films released in at least one of 19 Rentrak territories within two years of principal photography (see section 8.2).
Box office figures valid to end of 2011.

8.9 Local and overseas share of box office of UK films

Figure 8.2 shows that overall 29% of the international box office for domestic UK films (from 19 Rentrak territories) came from the local (UK and Republic of Ireland) theatrical market but, looking at films of different budget levels, there were differences in the proportions of total international box office from the local market. For films with budgets over £5 million, three quarters of the total international box office came from overseas, for films with budgets between £500,000 and £5 million, just over half of the total international box office came from overseas, but for the low budget films, nearly two thirds of the total international box office came from the local market.

Figure 8.2 Local and overseas share of domestic UK film box office, production years 2003–2009



	<£0.5 million	£0.5 – £2 million	£2 – £5 million	£5 – £10 million	£10+ million	Total
UK/R. of Ireland	64	44	43	25	26	29
Overseas	36	56	57	75	74	71

Source: Rentrak, DCMS, BFI.

Notes:
Release rates subject to limit of two years from principal photography (see section 8.2).
Box office figures valid to end of 2011.

Table 8.7 shows the relative importance of the international territories for UK films. The North American market accounted for 33% of the total international box office for domestic UK films, grossed from the 19 Rentrak territories. The domestic market (the UK and Republic of Ireland) accounted for 29% of the total box office, followed by the European countries (22%), Australia and New Zealand (8%), Japan and Korea (4%) and the main territories of Latin America (4%). The commonality of the English language between most UK films and the North American audience and the fact the US box office is the largest in the world (28% share of the total world box office in 2011, according to *Screen Digest*) partly explain the higher share of total box office of UK films attributed to the North American market.

Table 8.7 Share of 19 territory international box office of domestic UK films by geographically grouped territories, production years 2003–2009

Territories	Share of international box office (%)
USA and Canada	33
UK and Republic of Ireland	29
Austria, France, Germany, Italy, Netherlands, Portugal, Spain	22
Australia, New Zealand	8
Argentina, Brazil, Chile, Colombia, Mexico, Venezuela	4
Japan, Korea	4
Total of Rentrak multi-territory box office	**100**

Source: Rentrak, BFI.

Notes:
Release rates subject to two-year release limit (see section 8.2).
Box office figures valid to end of 2011.

It is interesting to look at the relative importance of international territories for domestic UK films at different budget levels. Table 8.8 shows the box office share over the groups of territories for the films in budget bands.

For the higher budget films (over £5 million), the USA and Canada is the most lucrative market accounting for around one third of the international box office. Second is the UK and Republic of Ireland (one quarter of the international market), closely followed by the European territories which account for just under a quarter of the total box office. For the films with budgets under £5 million the domestic market (UK and Republic of Ireland) is the most important, and its share of the total international box office increases as the budget level decreases.

For films with budgets between £500,000 and £5 million, the UK and Republic of Ireland accounts for just under half the total market, followed by the European territories with about a quarter of the market and the USA and Canada with one fifth of the total international box office. For the lowest budget films (less than £500,000) the UK and Republic of Ireland accounts for 62% of the total international box office, followed by the European territories (22%). Although the USA's box office is the world's largest, the USA and Canada is a small market for low budget domestic UK films. This territory accounts for just 6% of the total international box office for these films (less than Australia and New Zealand's 10%).

For films of all budget levels the European territories account for very similar shares of the total international box office (24% for films with budgets of £500,000 to £5 million and 22% for films of all other budget levels). The South American territories, Japan and Korea are not major markets for domestic UK films of any budget levels.

Table 8.8 Share of 19 territory international box office of domestic UK films by geographically grouped territories for different budget levels, production years 2003–2009

	Share of international box office (%)				
Territories	<£0.5 million	£0.5–£2 million	£2–£5 million	£5–£10 million	£10+ million
USA and Canada	6	17	21	36	34
Austria, France, Germany, Italy, Netherlands, Portugal, Spain	22	24	22	22	22
UK and Republic of Ireland	62	45	44	25	27
Argentina, Brazil, Chile, Colombia, Mexico, Venezuela	0	5	2	5	3
Australia, New Zealand	10	7	8	8	9
Japan, Korea	0	1	2	5	5
Total of Rentrak multi-territory box office	**100**	**100**	**100**	**100**	**100**

Source: Rentrak, BFI.

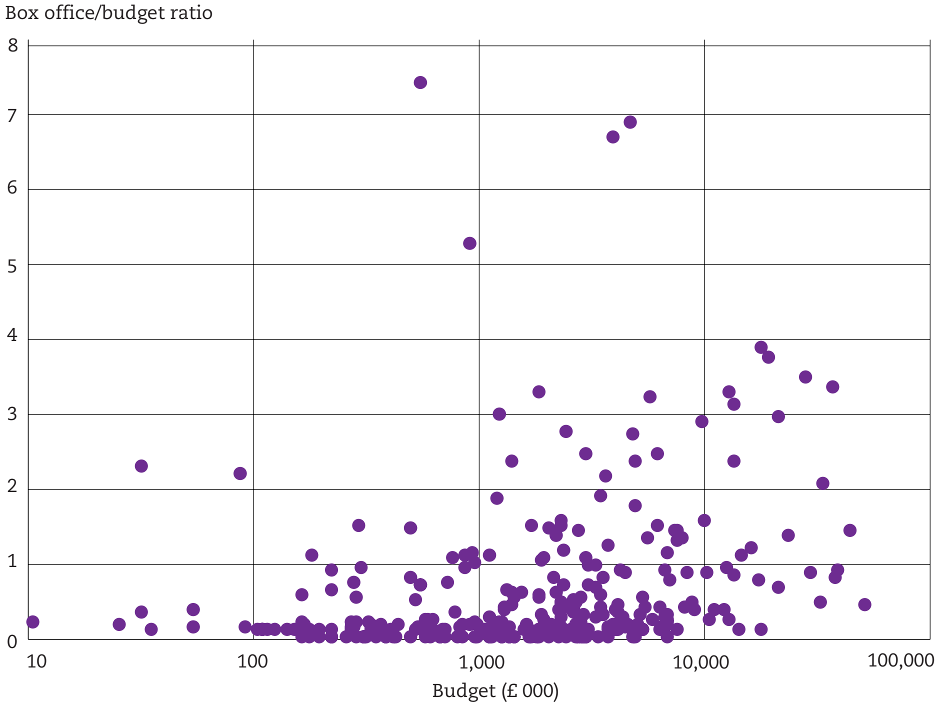
See notes to Table 8.7.
Totals may not sum to 100 due to rounding.

8.10 Profitability

It is difficult to measure the overall profitability of UK films. However, a proxy measure such as the ratio of international box office to budget can be a useful indicator. Previous analysis suggests that if a low to medium budget British film generates worldwide box office revenues greater than twice its budget, it is likely to be in profit by the time returns from ancillary revenues (physical video, digital downloads, TV, etc) are added to its income stream and all costs deducted (including VAT, exhibition, distribution and retail margins, prints and advertising, etc). Below that level it is likely to have made a loss. In the present study, the international box office from the 19 Rentrak territories is used as a proxy measure for 'worldwide' box office. Figure 8.3 shows the budget to box office ratio by budget of UK films shot between 2003 and 2009 which had gained a theatrical release within two years of principal photography.

Over this period only 25 (11%) of the 235 domestic UK films (with budgets of £500,000 or more) released internationally (in at least one of the 19 Rentrak territories) achieved a multi-territory box office to budget ratio of 2 or above. This suggests that only a small number of internationally released UK feature films are likely to have made profits for their producers and investors and underlines the highly risky nature of investment in film production.

Figure 8.3 International box office/budget ratio by budget of domestic UK films across 19 territories, production years 2003–2009



● Each dot is one film.

Source: Rentrak, BFI.

Notes:
Release rates subject to two-year release limit (see section 8.2).
Box office figures valid to end of 2011.
The horizontal axis is in log scale. Some films are not shown in order to avoid disclosing budget information.

Overall, 11% of the released domestic UK films with budgets of £500,000 or more achieved a multi-territory box office to budget ratio of 2 or above. However, there were variations between years over the period 2003 to 2009, as Table 8.9 shows. In 2008 only 5% of released films achieved a box office to budget ratio of 2 or more, but in 2006 and 2007 just under 14% of films achieved this ratio.

Table 8.9 Percentage of domestic UK films achieving multi-territory box office to budget ratio of 2 or above by year of production, 2003–2009

	2003	2004	2005	2006	2007	2008	2009	Total
Number of films released with two years of principal photography	31	23	33	29	36	44	39	235
Number of films achieving a ratio of 2 or above	3	3	3	4	5	2	5	25
% of films achieving a ratio of 2 or above	9.7	13.0	9.1	13.8	13.9	4.5	12.8	10.6

Source: Rentrak, BFI.

Notes:
Only films with budgets of £500,000 or more are included in the table.
Release rates subject to two-year release limit (see section 8.2).
Box office figures valid to end of 2011.

Table 8.10 shows that, as with release rates and average box office takings, the proportion of domestic UK films achieving a multi-territory box office to budget ratio of 2 or above increases with the level of budgets. For domestic UK films with budgets of less than £500,000 only 3% achieve this proxy measure of profitability, but for domestic UK films with budgets of £10 million or more 31% achieve the ratio. However, 18 of the 26 released films in this budget band, including all eight films which achieved the box office to budget ratio of 2 or more, are films which received financial support, which would include multi-territory distribution and promotion, from one of the major US studios.

Table 8.10 Percentage of domestic UK films achieving multi-territory box office to budget ratio of 2 or above by budget level, production years 2003–2009

	<£0.5 million	£0.5–£2 million	£2–£5 million	£5–£10 million	£10+ million	Total
Number of films released within two years of principal photography	65	92	83	34	26	300
Number of films achieving a ratio of 2 or above	2	5	7	5	8	27
% of films achieving a ratio of 2 or above	3.1	5.4	8.4	14.7	30.8	9.0

Source: Rentrak, BFI.

Notes:
Release rates subject to two-year release limit (see section 8.2).
Box office figures valid to end of 2011.

8.11 Films which were not released theatrically

In this chapter a film is considered to have been released theatrically if it was released within two years of principal photography. Films released more than two years after principal photography have been considered as not released when calculating release rates. Our data on box office and theatrical release details (opening date, distributor, etc) are supplied by Rentrak, and so the definition of release also depends on having the release data from them. Occasionally a film might be released for a short time in a small number of venues and is not tracked by Rentrak. Such a film would be included as not released in the release rate calculations (even if the limited release occurred within two years of principal photography). Even where a film is not shown in a cinema (whether tracked or not), there are many other ways for it to be seen by an audience, and so it is of interest to know what happens to films which do not achieve a theatrical release.

Our data included 514 films for which we had information on production, but no data on theatrical release from Rentrak. Using other sources of information (IMDb, film festival websites, films' own websites, etc) the outcome of these film projects (whether they have been shown at any venue or festival or whether they are available on any medium) was investigated. There are many possibilities for the outcome of a film project and Table 8.11 shows the number of films which fall into three broad outcome categories:

- the film has been completed and shown or is available;
- the film is still in production or post-production; and
- no information found.

The last category includes all films for which no information was available from the sources investigated, it does not indicate a definite outcome. For example, any film for which production has been abandoned would fall into the last category, but not all films in this category would have been abandoned. Table 8.11 shows that, overall, 55% of films which do not achieve a theatrical release are shown or are available on some other platform.

Table 8.11 Outcome of film projects by budget for domestic UK films which have not been released theatrically

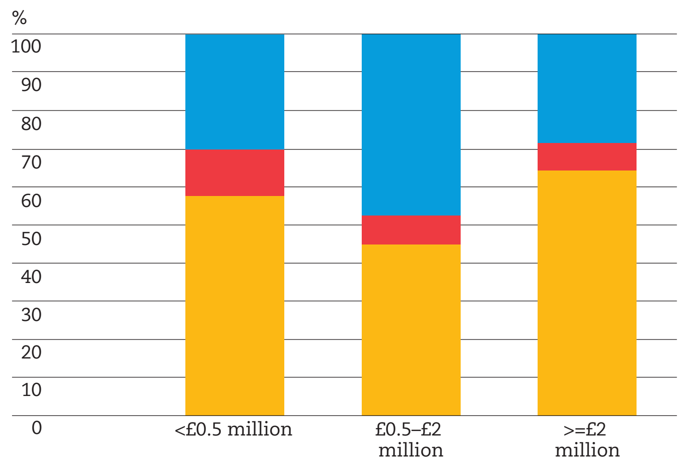
	Budget			
Outcome of film project	<£0.5 million	£0.5–£2 million	>=£2 million	Total
Shown/available	204	53	27	284
Still in production/post-production	43	9	3	55
No information	107	56	12	175
Total	354	118	42	514

Source: BFI RSU.

Note: Films which had limited releases that were not tracked by Rentrak are considered to be not released.

For non-released films with budgets between £500,000 and £2 million, just 45% of films have been shown at a small venue or festival or are available to the public on some platform, compared with 58% of films with budgets of less than £500,000 and 64% of films with budgets of £2 million or more (Figure 8.4). For the low budget films (under £500,000) the percentage which were still in production or post-production is 12%, compared with 8% for films with budgets between £500,000 and £2 million, and 7% for films with budgets of £2 million or more.

Figure 8.4 Percentages of 'non-released' film projects falling into each of three basic outcome categories by budget level



	<£0.5 million	£0.5–£2 million	>=£2 million
Shown/available	57.6	44.9	64.3
Still in production/post-production	12.1	7.6	7.1
No information	30.2	47.5	28.6
Total	**100.0**	**100.0**	**100.0**

Source: BFI RSU.

Notes:
Films which had limited releases that were not tracked by Rentrak are considered to be not released.
Percentages may not sum to 100 due to rounding.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

For films that have been identified as having been shown at some venue or available on some platform, Table 8.12 shows where they have been shown or are available. Some films are available on more than one platform or have been shown or broadcast and are also available on DVD or online.

Table 8.12 Numbers of 'non-released' films shown or available by budget

	Budget			
	<£0.5 million	£0.5–£2 million	>=£2 million	Total
Available on DVD	81	25	17	123
Available online	14	4	0	18
Shown on TV	7	7	11	25
Limited UK theatrical release	16	4	1	21
Theatrical release in India	1	4	1	6
Shown at film festival and other	37	14	6	57
Shown at film festival only	95	12	2	109
Total	204	53	27	284

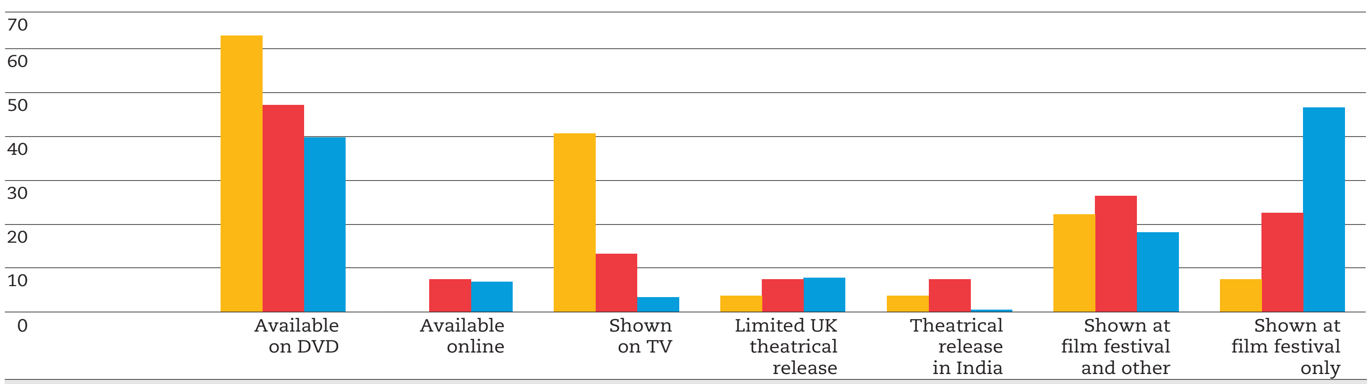
Source: BFI RSU.

Notes:
Categories may sum to more than the totals as some films are included in more than one category.
Films which had limited releases that were not tracked by Rentrak are considered to be not released.

For the films which did not achieve a theatrical release, but are available or have been shown on other platforms, there are differences by budget level in the percentages shown or available on different platforms (Figure 8.5). The percentage of films available on DVD or shown on TV increased with the level of budget, whereas the reverse is true of screenings at film festivals. The films shown at festivals have been divided into films screened at festivals and also available elsewhere and films screened at festivals only. A film festival provides in effect a one-off opportunity for a film to be viewed so a film shown just at a festival has less opportunity to reach an audience than one shown at a festival and also available on other platforms. A high percentage of low budget films (47%) have been shown at festivals only.

The difference between budget levels in the percentage of films shown on TV stands out, with 41% of films with budgets of £2 million or more having been shown on TV, compared with 13% of films with budgets between £500,000 and £2 million, and just 3% of films with budgets of less than £500,000. A higher percentage of lower budget films (8% of films in both of the two lower budget bands) had had a limited theatrical release which has not been tracked by Rentrak compared with the higher budget films (4% of films with budgets of £2 million or more). However, for the higher budget films the 4% represents just one film, and there was no information to show that any of the films in this budget band were available online. Rather than an indication that there is little demand for the higher budget films on these platforms, these low figures are more likely to have occurred because a low percentage of the higher budget films fail to achieve a tracked theatrical release.

Figure 8.5 Percentages of 'non-released' films in each shown or availability category by budget



	Available on DVD	Available online	Shown on TV	Limited UK theatrical release	Theatrical release in India	Shown at film festival and other	Shown at film festival only
>=£2 million	63.0	0.0	40.7	3.7	3.7	22.2	7.4
£0.5–2 million	47.2	7.5	13.2	7.5	7.5	26.4	22.6
<£0.5 million	39.7	6.9	3.4	7.8	0.5	18.1	46.6

Source: BFI RSU.

Notes:
Percentages over categories add to more than 100 as some films are included in more than one category.
Films which had limited releases that were not tracked by Rentrak are considered to be not released.

► For cinema admissions and box office in 2011 see Chapter 1 (page 8)
► For UK films on video see Chapter 11 (page 111)
► For UK films on television see Chapter 13 (page 124)
► For UK films internationally see Chapter 6 (page 56)
► For US studio involvement in UK film production in 2011 see Chapter 17 (page 155)
► Analysis of the film economy is given in Chapter 21 (page 189)

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 9:

Distribution

In an increasingly crowded theatrical marketplace, distributors are spending more on advertising than ever before. Advertising spend in 2011 was 16% higher than in 2010 while the number of releases was virtually unchanged.

Facts in focus:

- The top 10 distributors had a 94% share of the market in 2011, the same as in 2010.
- Weekdays (Monday to Thursday) accounted for 42% of the box office, the highest share since our records began.
- Opening weekends represented 28% of the total box office.
- The estimated total advertising spend was £197 million. The average advertising spend for studio-backed UK films was £1.6 million and for UK independent films was just under £0.2 million.

9.1 Distributors in 2011

Table 9.1 shows that the top 10 distributors had a 94% share of the market in 2011 from the release of 254 titles (37% of total releases). This is similar to 2010 when the top 10 distributors had a 94% share of the market from 38% of total releases. The remaining 98 distributors handled a total of 435 titles, 63% of all releases, but gained only a 6% share of the box office.

The leading distributor was Warner Bros, which released the top earning film of 2011, *Harry Potter and the Deathly Hallows: Part 2*, as well as *The Hangover Part II* and *Sherlock Holmes: A Game of Shadows*. Table 9.1 shows box office takings by distributor for all films on release in 2011, and hence the box office takings of some films which were released in 2010 but remained on release into 2011 are included. In second place in the list of top 10 distributors is Paramount whose highest earning films of the year were *The Adventures of Tintin: The Secret of the Unicorn, Kung Fu Panda 2, Mission: Impossible – Ghost Protocol* and *Transformers: Dark of the Moon*. All of these films are in the list of the top 20 films of the year.

Table 9.1 Distributor share of box office, UK and Republic of Ireland, 2011

Distributor	Market share (%)	Films on release in 2011	Box office gross (£ million)
Warner Bros	18.2	30	210.4
Paramount	16.3	32	189.4
20th Century Fox	12.1	31	140.0
Universal	11.8	34	136.9
Walt Disney	8.7	14	100.2
Sony Pictures	7.2	24	83.5
Entertainment	6.7	22	77.2
eOne Films	5.1	11	58.9
Momentum	4.6	13	53.0
StudioCanal/Optimum*	3.8	43	44.5
Sub-total	94.4	254	1,094.0
Others (98 distributors)	5.6	435	65.3
Total	**100.0**	**689**	**1,159.3**

Source: Rentrak.

Notes:
Box office gross = cumulative box office total for all films handled by the distributor in the period 31 December 2010 to 5 January 2012.
* Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.
Percentages may not add to sub-totals due to rounding.

Foreign language films accounted for one third of releases at the UK box office in 2011. The top 10 distributors of foreign language films released 93 of the total 182 titles (Table 9.2). There were more releases in Hindi than any other non-English language in 2011 so companies releasing Indian films – such as Eros International, Reliance Big Pictures, UTV Motion Pictures, B4U Network and Ayngaran International – dominate the list. 20th Century Fox, the distributor of the highest grossing foreign language film of the year (Pedro Almodvar's *The Skin I Live In*) also released two Hindi language titles, *Dum Maaro Dum* and *Force*. Ayngaran International released the most foreign language titles (17) in 2011, while Eros International's 16 releases had the biggest share of the box office (£5.8 million).

The distributor of non-Indian foreign language films with the highest box office share was StudioCanal/Optimum, whose titles included *Biutiful*, *Potiche* and *Sarah's Key*.

Image: ***My Week with Marilyn*** *courtesy of Entertainment Film Distributors*

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 9.2 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2011 (ranked by box office gross)

Distributor	Films released in 2011	Average widest point of release	Box office gross (£ million)
Eros International	16	39	5.8
Reliance Big Pictures	6	41	3.5
StudioCanal/Optimum*	14	23	2.8
Artificial Eye	9	22	1.9
20th Century Fox	3	80	1.9
UTV Motion Pictures	6	35	1.5
B4U Network	12	15	1.3
Ayngaran	17	10	0.8
Yash Raj Films	2	38	0.6
Soda Pictures	8	10	0.5

Source: Rentrak, BFI RSU analysis.

Notes: The list includes distributors releasing two or more foreign language titles in 2011.
* Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

9.2 Distributors 2004–2011

The distributors' market shares fluctuate from year to year (Table 9.3). The leading distributor of 2010, Warner Bros, was again the top distributor in 2011, with similar market shares in both years. In 2011 Warner Bros releases included the top film of the year, *Harry Potter and the Deathly Hallows: Part 2*, as well as other popular titles such as *The Hangover Part II* and *Sherlock Holmes: A Game of Shadows*. The share of box office made by distributors outside the top 10 was just under 6% in 2011, which is the third highest share for distributors in this category since 2004. In the last few years it has ranged from under 3% in 2005 to just below 8% in 2009.

Table 9.3 Distributor market share as percentage of box office gross, 2004–2011

Distributor	2004	2005	2006	2007	2008	2009	2010	2011
Warner Bros	14.7	18.2	8.2	15.6	11	11.2	18.3	18.2
Paramount	–	–	–	14.7	16.9	10.8	14.8	16.3
20th Century Fox	10.7	14.3	20.9	13.9	9.4	16.6	15.9	12.1
Universal Pictures	–	–	–	13.9	18.5	10.5	10.2	11.8
Walt Disney	14.5	13.1	15.7	10.7	9.9	12.4	14.0	8.7
Sony Pictures	10	6.8	16.1	8.2	12.5	11.3	6.9	7.2
Entertainment	7.9	9.4	7.9	9.5	8.0	8.6	2.5	6.7
eOne Films	–	–	–	–	–	4.9	5.5	5.1
Momentum	2.2	1.9	2.3	3.4	3.5	–	–	4.6
StudioCanal/Optimum	–	–	–	–	–	–	2.2	3.8
Lions Gate	1.0	0.3	2.4	2.3	2.5	2.9	3.5	–
Pathé	2.8	3.4	3.2	1.3	2.1	2.9	–	–
UIP*	29.8	29.1	18.9	–	–	–	–	–
Top 10 total**	96.1	97.3	96.4	94.5	94.5	92.2	93.7	94.4
Others	3.9	2.7	3.6	5.5	5.5	7.8	6.3	5.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Rentrak.

* Until 2006 Paramount and Universal distributed jointly as UIP.
** Top 10 total refers to the top 10 distributors of that particular year. The table is ranked by top 10 distributors in 2011.
Note: Percentages may not add to sub-totals due to rounding.

9.3 Weekend box office

In 2011, 58% of the box office was taken at weekends (Friday to Sunday), the lowest percentage of the last eight years (Table 9.4). As in 2009 and 2010, the films released in 2011 included a significant number which attracted large weekday audiences. Films which appeal to older audiences tend to get good weekday admissions and family films tend to draw weekday audiences during school holidays. Some of the top films of the year belonged in these categories. The best known example of a film which appeals to older audiences is *The King's Speech*, which took 42% of its box office during the week. Other films with broad appeal took even higher percentages of box office outside the weekend. *My Week with Marilyn*, for example, took 48% of its box office during the week. Also, some of 2011's family films, such as *Arthur Christmas* and *Harry Potter and the Deathly Hallows: Part 2*, were very successful at the box office. *Harry Potter and the Deathly Hallows: Part 2* was released on 15 July but 47% of its box office was taken during weekdays in August when school pupils were on holiday.

In addition, the 'Orange Wednesdays' promotion continued to have an impact in 2011 with 14% of the box office being taken on Wednesdays (the highest percentage of box office taken on Wednesdays over the last eight years).

Table 9.4 Box office percentage share by weekday/weekend, 2004–2011

	2004	2005	2006	2007	2008	2009	2010	2011
Friday	15.3	18.0	16.5	16.4	16.7	16.4	16.0	16.6
Saturday	24.5	27.0	25.1	27.8	24.4	24.0	24.1	23.8
Sunday	19.9	19.0	18.7	19.3	18.3	17.8	18.5	17.6
Weekend	**59.7**	**64.0**	**60.3**	**63.5**	**59.4**	**58.2**	**58.6**	**57.9**
Monday	9.7	8.0	9.5	7.2	9.4	9.2	9.5	9.2
Tuesday	10.1	8.0	9.5	9.0	9.5	9.5	9.3	9.1
Wednesday	10.7	10.0	10.9	11.6	11.9	13.7	13.2	13.9
Thursday	9.8	10.0	9.7	8.7	9.9	9.5	9.3	9.8
Weekday	**40.3**	**36.0**	**39.7**	**36.5**	**40.7**	**41.8**	**41.4**	**42.1**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Rentrak.

Note: Percentages may not add to weekend/weekday sub-totals due to rounding.

The opening weekend box office as a share of total theatrical revenue was 28% in 2011 as shown in Table 9.5. The year's top film, *Harry Potter and the Deathly Hallows: Part 2,* took £23.8 million on its opening weekend, which is the record for a three-day opening weekend (if a film is previewed before the official Friday opening, its opening weekend box office figures include the takings from its previews). This opening weekend gross represented 33% of the film's total box office. Both *Mission: Impossible – Ghost Protocol* and *The Twilight Saga: Breaking Dawn – Part 1* were high grossing films and both took almost half their total grosses on their opening weekends.

Table 9.5 Opening weekend as percentage of total box office, 2007–2011

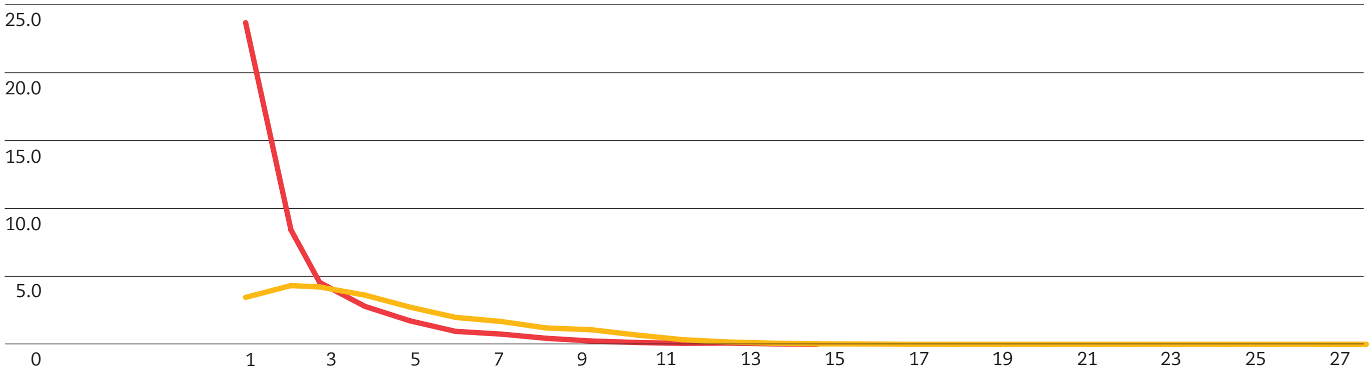
Range of box office results (£ million)	% of total in opening weekend 2007	% of total in opening weekend 2008	% of total in opening weekend 2009	% of total in opening weekend 2010	% of total in opening weekend 2011
>30	35.8	21.7	18.8	27.4	29.4
20 – 30	30.2	31.0	23.0	35.8	22.6
10 – 19.9	20.0	29.2	32.2	26.1	27.6
5 – 9.9	25.4	27.6	26.1	26.7	26.2
1 – 4.9	28.1	27.4	30.3	30.4	32.2
0.2 – 0.9	31.9	34.1	35.5	31.9	35.5
<0.2	34.1	34.8	36.5	34.8	38.5
All films	**28.5**	**27.3**	**26.1**	**28.6**	**28.1**

Source: Rentrak, BFI RSU analysis.

Note: Opening weekends include preview figures. For films with a limited initial opening, the wider release figure is included in the analysis.

Four of the top five films of the year (including *Harry Potter and the Deathly Hallows: Part 2*, mentioned above) took nearly one third of their total grosses in their opening weekends. In contrast, the second highest grossing film of the year, *The King's Speech*, took £3.5 million in its opening weekend, which represents just 8% of its total gross. Figure 9.1 shows the box office takings by week of release for the two films. *The King's Speech* stayed on release for 27 weeks, whereas *Harry Potter and the Deathly Hallows: Part 2* was shown for 17 weeks. Also, the week-to-week decrease in box office takings for *The King's Speech* was low, helped by its successes at the BAFTA Awards and the Oscars®, and by good word-of-mouth recommendations.

Figure 9.1 Box office takings by week of release for *Harry Potter and the Deathly Hallows: Part 2* and *The King's Speech*



Week	1	3	5	7	9	11	13	15	17	19	21	23	25	27
The King's Speech	3.53	4.23	2.74	1.69	1.08	0.35	0.09	0.03	0.01	<0.01	<0.01	<0.01	<0.01	<0.01
Harry Potter and the Deathly Hallows: Part 2	23.77	4.57	1.74	0.77	0.26	0.09	0.05	<0.01	<0.01					

Source: Rentrak, BFI RSU analysis.

9.4 Release costs

The opening weekend is recognised as being crucial to the success of a film, both in cinemas and on subsequent release platforms. This is particularly true of high budget productions aimed at mass audiences.

Distributors invest heavily in advertising in order to raise a film's profile across all media (outdoor posters, print media, television, radio and increasingly online). The estimated total advertising spend by distributors in 2011 was £197 million, up 16% from £171 million in 2010 (Table 9.6). As there were almost the same number of films released in 2011 as in 2010 (557 in 2010 and 558 in 2011), the average advertising spend per film has increased by the same percentage. Both press and radio spend have fallen over the last eight years (from £30.1 million and £9.7 million respectively in 2003), though the 2011 spend for press was higher than in 2010.

Table 9.6 Estimated advertising spend, 2003 and 2007–2011

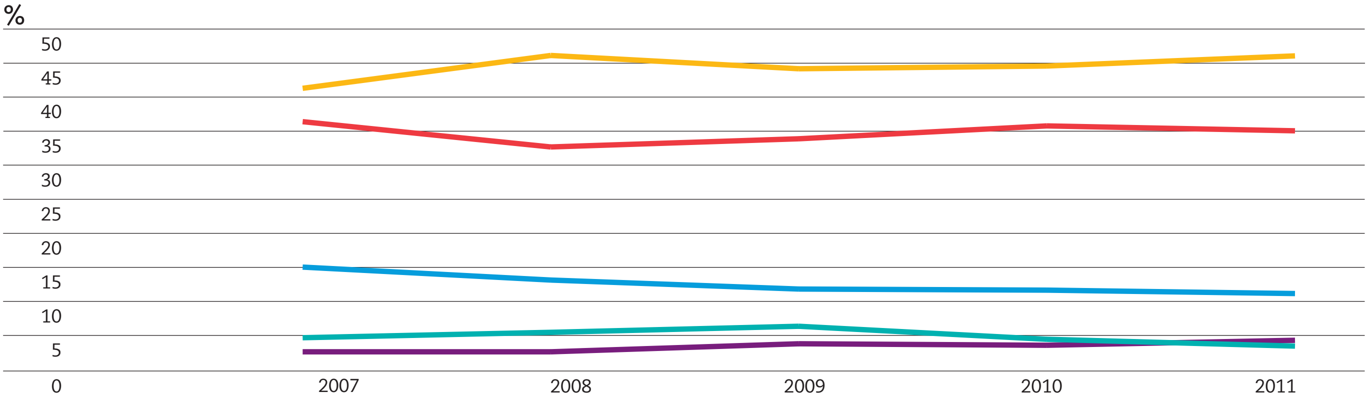
(£ million)

Medium	2003	2007	2008	2009	2010	2011
TV	61.2	74.1	79.3	74.3	76.0	90.8
Outdoor	46.6	65.3	56.2	57.0	61.0	69.1
Press	30.1	27.0	22.6	19.9	19.9	22.0
Radio	9.7	8.4	9.4	10.7	7.6	6.8
Internet	–	4.7	4.5	6.4	6.1	8.5
Total	**147.6**	**179.5**	**172.0**	**168.3**	**170.6**	**197.2**

Source: Nielsen Media Research.

Figure 9.2 shows the percentage share of advertising spend by medium since 2007. Over the period most advertising spend has been via TV and outdoor advertisements. As noted, spend on advertisements in the press has been steadily decreasing, in part due to falling newspaper circulations. Advertising on the internet accounted for the lowest spend until 2010, but has been steadily increasing over the period and overtook radio for the first time in 2011.

Figure 9.2 Percentage share of advertising spend by medium, 2007–2011



	2007	2008	2009	2010	2011
TV	41.3	46.1	44.1	44.5	46.0
Outdoor	36.4	32.7	33.9	35.8	35.0
Press	15.0	13.1	11.8	11.7	11.2
Radio	4.7	5.5	6.4	4.5	3.4
Internet	2.6	2.6	3.8	3.6	4.3

Source: Nielsen Media Research.

Approximately £47 million was spent on advertising British films in 2011, up from £36 million in 2010. This increase is mainly due to the advertising spend of the UK/USA studio films, though a few UK independent films received similarly high levels of advertising. In 2011, there were 17 UK/USA studio films released compared with 11 in 2010. The advertising spend for studio-backed films was £28 million (£1.6 million per film on average) and the spend on advertising independent films was £19 million (an average of just under £0.2 million per film).

Using the information on advertising spend, and estimating print costs, the total release costs for various release widths can be estimated. When all cinema screens had analogue projection, we estimated print costs at £1,000 per print. Now, however, a high proportion of cinema screens have digital projection. With both analogue and digital distribution, as well as striking and refurbishing 35mm prints, distributors incur digital mastering and duplication costs and in many instances now Virtual Print Fees (VPF).

The current VPF system which sees fees payable on separate bookings has meant that costs for the widest releases, where prints are not moved to other cinemas, have come down compared with the cost of producing a 35mm print for the same film, while those for smaller releases, where prints are commonly transferred to another cinema, have increased in comparison. However, given that VPF come out of print savings, it seems reasonable to assume that, overall, the current cost of prints for a film is similar to the cost when all prints were analogue.

So, keeping the estimate of a typical print cost of £1,000 per print and adding the Nielsen Media Research advertising spend estimate plus 20% for other public relations campaigns, publicity and premiere costs, the average release cost for different levels of theatrical release can be calculated (Table 9.7). This shows that for films released across the widest number of cinemas (500+), the average release cost was £3.1 million, compared with £2.6 million in 2010 and £3.4 million in 2009.

Average release costs for the films with the widest releases have increased from 2010 levels but are lower than in 2009. As mentioned above, the 2011 average advertising costs for all films was 16% higher than the 2010 average, and Table 9.7 shows that average release costs for films in the top four width of release categories (ie those which spend most on advertising) were higher in 2011 than in 2010. Films with widest points of release between 50 and 200 on average spent less on advertising in 2011 than in 2010 but, overall, release costs were higher in 2011 than in 2010.

Table 9.7 Estimated release cost by width of release, 2008–2011

Sites at widest point of release	Average release costs 2008 (£ million)	Average release costs 2009 (£ million)	Average release costs 2010 (£ million)	Average release costs 2011 (£ million)
500+	3.95	3.40	2.65	3.14
400 – 499	2.21	2.05	2.09	2.17
300 – 399	1.39	1.32	1.24	1.38
200 – 299	0.90	0.84	0.77	0.82
100 – 199	0.43	0.51	0.33	0.31
50 – 99	0.18	0.21	0.20	0.16
10 – 49	0.08	0.06	0.04	0.05
<10	0.01	0.01	0.01	0.01

Source: Nielsen Media Research, Rentrak, BFI RSU analysis.

Note: The print costs calculations assume print costs for a combination of digital and analogue distribution are the same as for analogue distribution.

- For further details about the UK box office in 2011 see Chapter 1 (page 8)
- For more information about the top films at the UK box office in 2011 see Chapter 2 (page 18)
- For information about specialised film releases at the UK box office see Chapter 5 (page 46)
- For an overview of employment in film distribution see Chapter 22 (page 198)

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 10:

Exhibition

The number of screens in the UK continues to rise, although the number of screens per person and admissions per person vary considerably across the UK. Complementing the commercial sector, however, is a thriving voluntary sector in film exhibition, and film society membership is high in areas less well served by commercial cinemas.

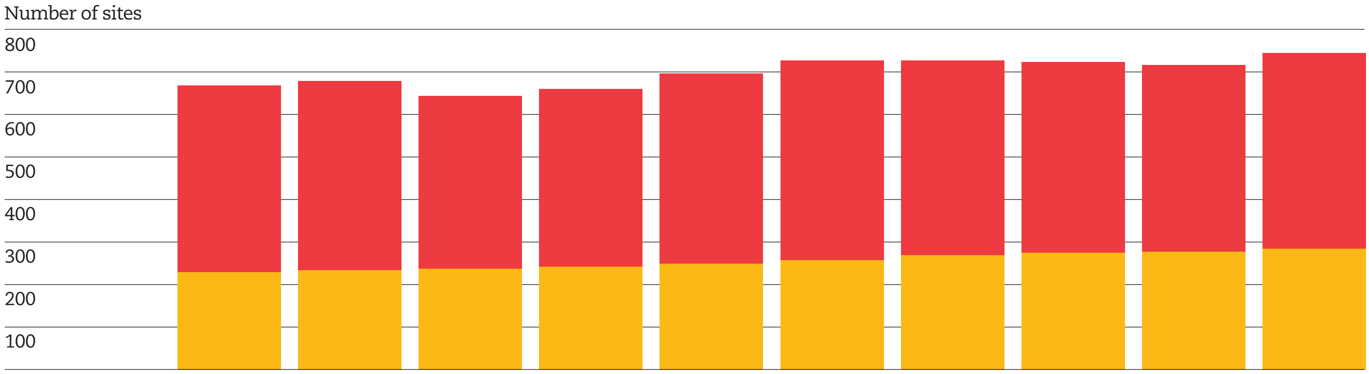
Facts in focus:

- The UK had 3,767 screens, 96 more than 2010, in 745 cinemas.
- There were six screens for every 100,000 people, the same as in 2010, but lower than countries such as the USA (12.6 screens per 100,000 people), France (9.1), Australia (8.8), Spain (8.4) and Italy (6.7).
- Northern Ireland had the highest number of screens (11.3) per 100,000 people in the UK, while the East Midlands (4.6), North East (4.5) and the East of England (4.0) had the lowest.
- Only 7% of screens were dedicated to 'specialised' (that is non-mainstream) programming, with 0.2% dedicated mainly to South Asian films.
- The UK had the second highest number of digital screens in Europe with 2,714 screens (behind France's 3,653 digital screens). The UK had 1,475 screens capable of screening digital 3D features (54% of all digital screens).
- The average ticket price was £6.06.

10.1 UK cinema sites

Figure 10.1 shows the number of cinema sites in the UK from 2002 to 2011. The total number of sites has fluctuated over the period with a low of 644 in 2004 and a high of 745 in 2011. The number of purpose-built multiplex sites, however, has steadily risen from 229 in 2002 to 285 in 2011. Multiplexes made up 38% of all cinema sites in 2011.

Figure 10.1 UK cinema sites by type of site, 2002–2011



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Multiplex	229	234	238	242	249	258	269	275	278	285
Traditional and mixed use	439	444	406	417	448	469	457	448	438	460
Total sites	**668**	**678**	**644**	**659**	**697**	**727**	**726**	**723**	**716**	**745**
% multiplex sites	34	35	37	37	36	35	37	38	39	38

Source: Dodona Research, BFI RSU analysis.

Notes:
Data on cinema sites before 2002 are not available.
Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.

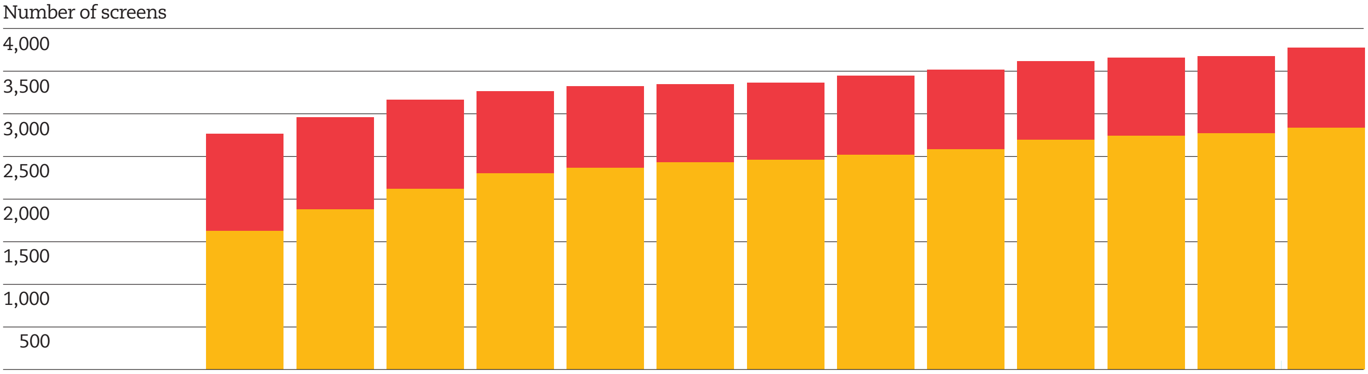
10.2 UK screens

The number of owned or programmed cinema screens (excluding those operated in venues such as schools and private screening rooms) increased in 2011 compared with 2010, rising by 96 to 3,767, as Figure 10.2 shows.

The proportion of multiplex screens (see definition in the note to Figure 10.1) was the same in 2011 as in 2010. There has been an increase of 74% in the number of such screens since 1999 compared with an 18% fall in the number of traditional and mixed use screens (used for film screenings only part of the time). The UK has gained 1,209 multiplex screens since 1999 and lost 200 traditional or mixed use screens. The proportion of multiplex screens increased from 59% in 1999 to 75% in 2009. This proportion was maintained in 2010 and 2011.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 10.2 UK cinema screens by type of cinema, 1999–2011



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Multiplex	1,624	1,874	2,115	2,299	2,362	2,426	2,453	2,512	2,578	2,689	2,735	2,767	2,833
Traditional and mixed use	1,134	1,080	1,049	959	956	916	904	928	936	921	916	904	934
Total screens	**2,758**	**2,954**	**3,164**	**3,258**	**3,318**	**3,342**	**3,357**	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**
% multiplex screens	58.9	63.4	66.8	70.6	71.2	72.6	73.1	73.0	73.4	74.5	74.9	75.4	75.2

Source: Dodona Research, BFI RSU analysis.

See note to Figure 10.1.

Table 10.1 shows that more multiplex sites and screens opened than closed in 2011 while there were also net gains in the number of traditional sites and screens over the year. The number of traditional screens had been falling each year since 2008 but increased by 30 from 2010 to 2011 as shown in Figure 10.2.

A total of 18 sites (all traditional) closed in 2011, 14 fewer than the number of closures in 2010, with a loss of 22 screens (30 fewer than in 2010). Forty-seven sites opened (including seven multiplexes), adding 118 screens, including 66 multiplex screens. The changes in screen numbers shown in Table 10.1 include changes in numbers of screens in existing cinemas as well as in newly opened and closed cinemas.

Table 10.1 Site openings and closures, 2011

	Multiplex		Traditional	
	Sites	Screens	Sites	Screens
Opened	7	66	40	52
Closed	0	0	18	22
Net difference	+7	+66	+22	+30

Source: Dodona Research, BFI RSU analysis.

See note to Figure 10.1.

10.3 Screen location

In 2011, 97% of all screens in the UK were located in town or city centres, edge of centre, ‘out of town’ or suburban locations.

Table 10.2 shows suburban and rural cinemas tend to have fewer screens on average than their urban counterparts, although town and city centre sites are also relatively small. In 2011, the number of suburban screens stayed the same, but there was an increase in the numbers of screens in all other locations. The increase in the number of rural screens was small, however, with the addition of just one screen.

Table 10.2 Screens by location, 2003–2011

	2003	2004	2005	2006	2007	2008	2009	2010	2011	% change 2010–2011	Average no. of screens per site
Town/city centre	1,470	1,502	1,495	1,555	1,616	1,683	1,732	1,726	1,785	3.4	3.9
Out of town	1,234	1,243	1,250	1,262	1,284	1,303	1,297	1,311	1,335	1.8	9.8
Edge of centre	464	465	479	478	486	499	498	506	518	2.4	8.9
Suburban	33	33	38	40	30	30	27	28	28	0.0	1.9
Rural	117	99	95	105	98	95	97	100	101	1.0	1.4
Total	**3,318**	**3,342**	**3,357**	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**	**2.6**	**5.1**

Source: Dodona Research, BFI RSU analysis.

10.4 Screen density and admissions per person – international comparisons

A standard way to gauge the level of cinema provision is by ‘screen density’, ie the number of screens per unit of population. In 2011 the UK figure was 6.1 screens per 100,000 people, slightly higher than 2010’s figure of 6.0. This level of access to screens falls short of the numbers in other major film territories: USA (12.6), France (9.1), Australia (8.8), Spain (8.4) and Italy (6.7). Germany’s screen density, of 5.7 screens per 100,000 people, is slightly less than the UK’s (source: *Screen Digest*).

Table 10.3 shows the numbers of admissions per person in a number of major film territories. The UK saw more admissions per person (2.7) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the major territories, Australia and the USA had the highest admissions per person (3.8 for both countries).

Table 10.3 Admissions per person in major film territories, 2003–2011

	Australia	USA	France	**UK**	Spain	Italy	Germany
2003	4.5	4.8	3.0	**2.8**	3.2	1.5	1.8
2004	4.5	4.6	3.4	**2.9**	3.3	1.7	1.9
2005	4.0	4.3	3.0	**2.7**	2.9	1.5	1.5
2006	4.0	4.3	3.2	**2.6**	2.7	1.6	1.7
2007	4.0	4.3	3.0	**2.7**	2.6	1.7	1.5
2008	3.9	4.1	3.2	**2.7**	2.3	1.7	1.6
2009	4.1	4.2	3.4	**2.8**	2.4	1.6	1.8
2010	4.1	4.0	3.4	**2.7**	2.2	1.8	1.5
2011	3.8	3.8	3.6	**2.7**	2.1	1.7	1.6

Source: *Screen Digest*.

10.5 Screen density and admissions per person in the UK

As in previous Yearbooks we are able to present screen provision data based on two types of regional classification. The datasets are not directly comparable because of differences in the way the regions are defined; they do, however, shed light on different aspects of national and regional variation in screen provision.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

The Cinema Advertising Association produces monthly admissions totals for each of the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Screen and admissions data for 2011 using these television regions are presented in Table 10.4. Although London had the highest numbers of screens and sites, its screen density (6.8) was lower than that of Northern Ireland (11.5) and slightly higher than Lancashire and Central Scotland (both 6.5). The North East had the lowest screen density (4.3) among all ISBA regions.

Table 10.4 Screens and admissions by ISBA TV region, 2011 (ranked by screens per 100,000 people)

ISBA TV region	Screens	% of total screens	Sites	Population (000)*	Screens per 100,000 people	Admissions (000)	Admissions per screen	Admissions per person
Northern Ireland	203	5.4	29	1,773	11.5	5,856	28,845	3.3
London	829	22.0	161	12,263	6.8	42,639	51,434	3.5
Lancashire	452	12.0	65	6,966	6.5	17,486	38,685	2.5
Central Scotland	235	6.2	37	3,626	6.5	11,955	50,874	3.3
Wales and West	304	8.1	71	4,789	6.3	12,148	39,961	2.5
South West	115	3.1	38	1,830	6.3	4,180	36,351	2.3
Northern Scotland	78	2.1	19	1,256	6.2	3,727	47,787	3.0
Southern	331	8.8	81	5,401	6.1	16,025	48,415	3.0
Border	35	0.9	18	608	5.8	1,394	39,827	2.3
Midlands	552	14.7	101	9,832	5.6	23,932	43,354	2.4
East of England	217	5.8	47	4,188	5.2	11,451	52,771	2.7
Yorkshire	292	7.8	51	5,890	5.0	14,176	48,546	2.4
North East	124	3.3	27	2,885	4.3	6,594	53,175	2.3
Total	**3,767**	**100.0**	**745**	**61,307**	**6.1**	**171,563**	**45,543**	**2.8**

Source: Dodona Research, Beacon Dodsworth, Cinema Advertising Association (CAA), BFI RSU analysis.

* Mid-year population estimates 2009. Crown copyright material is reproduced with the permission of the Controller Office of Public Sector Information (OPSI).
Note: Percentages may not add to 100 due to rounding.

As Figure 10.3 shows, in 2011 there was a positive and statistically significant linear relationship between cinema admissions per person and screen density, ie the higher the number of screens per person, the higher the admissions level. However, this association should not be interpreted as a causal relationship as it would be hard to prove whether higher demand caused the higher supply of cinema screens or vice versa.

The pattern of admissions by screen density for ISBA regions in 2011 was very similar to the patterns in 2010 and earlier years. In 2011, as in 2010, some regions had above average screen densities but their levels of admissions remained low. For example, Lancashire had a relatively high screen density of 6.5 per 100,000 people but its cinema admissions rate was lower than average at 2.5 admissions per person. There are many factors which might contribute to differences in admissions in different areas. There could be a high number of screens per person in an area, but the cinemas might not be easy to access for many of the people living in the area. Other factors possibly affecting levels of admissions include the age composition of the population (60% of cinema-goers were under 35 in 2010) and competition from other forms of entertainment (and from other platforms for watching film).

Figure 10.3 Cinema admissions per person by screen density across ISBA regions, 2011

Source: Dodona Research, Beacon Dodsworth, CAA, BFI RSU analysis.

* Mid-year population estimates 2009. Crown copyright material is reproduced with the permission of the Controller Office of Public Sector Information (OPSI).

Notes:
The line shown above is derived from a weighted linear regression so the results are more influenced by areas with larger population, for example, London and the Midlands. The relationship between the variables is positive and statistically significant.
The area of the circle is proportional to the ISBA region's population.
Screen density means number of screens per 100,000 people.

Table 10.5 gives screen information for each of the English regions, plus Scotland, Wales and Northern Ireland.

Table 10.5 Screens and population in the nations and regions, 2011 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (in 000) mid-year 2010*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	203	5.4	29	1,799	11.3	7.0
London	597	15.8	117	7,825	7.6	5.1
North West	455	12.1	68	6,936	6.6	6.7
Wales	189	5.0	48	3,006	6.3	3.9
South East	532	14.1	120	8,523	6.2	4.4
Scotland	325	8.6	64	5,222	6.2	5.1
South West	323	8.6	85	5,274	6.1	3.8
West Midlands	311	8.3	53	5,455	5.7	5.9
Yorkshire and The Humber	256	6.8	46	5,301	4.8	5.6
East Midlands	205	5.4	38	4,481	4.6	5.4
North East	118	3.1	23	2,607	4.5	5.1
East of England	236	6.3	50	5,832	4.0	4.7
Others**	17	0.5	4	n/a	n/a	4.3
Total	**3,767**	**100.0**	**745**	**62,261**	**6.1**	**5.1**

Source: Dodona Research, Office for National Statistics (ONS), BFI RSU analysis.

* Mid-2010 Population Estimates, ONS.
** Others include the Channel Islands and the Isle of Man.
n/a = not available.

The order of national and regional variation in screen provision changed slightly in 2011 with the North West moving from fifth place to third in the screen density rankings. Northern Ireland had the highest number of screens per 100,000 people of the four nations (11.3), followed by Wales (6.3), Scotland (6.2) and England (5.8).

Table 10.5 also shows that Northern Ireland and the North West had on average over six screens per site compared with the UK average of five. The South West, Wales and the South East fell below the average, showing a tendency towards smaller cinemas and, particularly for the South West, proportionally fewer multiplex screens (Table 10.6).

10.6 Type of cinema screens by nation and region

Table 10.6 provides a snapshot of variations in multiplex provision around the UK. The North West had the largest number of multiplex screens (405), 15 more than both the South East and London. The North West also had the highest proportion of multiplex screens (89%). In England the lowest concentration of multiplex screens was found in the South West (59%), which had a high number of traditional and mixed use screens (the third highest after London and the South East). The proportion of multiplex screens for England as a whole was 75%.

Table 10.6 Cinema screens by type by nation or region, 2011 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed use	Total
North West	405	89.0	50	455
Northern Ireland	169	83.3	34	203
Yorkshire and The Humber	211	82.4	45	256
North East	97	82.2	21	118
East Midlands	161	78.5	44	205
West Midlands	241	77.5	70	311
Wales	146	77.2	43	189
Scotland	248	76.3	77	325
East of England	176	74.6	60	236
South East	390	73.3	142	532
London	390	65.3	207	597
Others*	10	58.8	7	17
South West	189	58.5	134	323
Total	**2,833**	**75.2**	**934**	**3,767**

Source: Dodona Research, BFI RSU analysis.

* Others include the Channel Islands and the Isle of Man.

10.7 Mainstream, specialised and South Asian programming

Dodona Research categorises screens according to whether they show mostly mainstream, specialised (ie non-mainstream, including ‘arthouse’) or South Asian films.

Table 10.7 shows that by far the majority of screens chiefly show mainstream films. In 2011, 571 cinemas with 3,501 screens showed mostly mainstream films (a 2% increase in the number of screens and a 4% increase in the number of sites compared with 2010). This compared with 171 sites (259 screens, 7% of screens) showing specialised films and three cinemas (seven screens, 0.2% of screens) dedicated mainly to South Asian films. The numbers of screens showing mostly specialised films increased by 4% in 2011 and the number of cinemas increased by 5%.

Table 10.7 Sites and screens by programme, 2005–2011

	Sites							Screens						
Programme	2005	2006	2007	2008	2009	2010	2011	2005	2006	2007	2008	2009	2010	2011
South Asian	5	5	4	4	4	3	3	18	18	10	10	10	7	7
Specialised	132	157	177	168	168	163	171	206	231	255	250	253	248	259
Mainstream	522	535	546	554	551	550	571	3,133	3,191	3,249	3,350	3,388	3,416	3,501

Source: Dodona Research, BFI RSU analysis.

The majority (67%) of specialised screens were found in single, independent cinemas (ie not part of a chain).

The pattern of programme type by location in 2011 is shown in Table 10.8. Screens showing mostly South Asian films were located in town or city centres and suburban areas, while those devoted to specialised film were mainly found in town or city centres. The overall pattern remained similar to 2010.

Table 10.8 Percentages of screens by location and programme, 2011

Location	South Asian	Specialised	Mainstream	Total
Town/city centre	71.4	83.8	44.6	47.4
Out of town	–	2.7	37.9	35.4
Edge of centre	–	1.9	14.7	13.8
Suburban	28.6	3.9	0.5	0.7
Rural	–	7.7	2.3	2.7
Total	**100.0**	**100.0**	**100.0**	**100.0**

Source: Dodona Research, BFI RSU analysis.

Note: Percentages may not add to totals due to rounding.

This geographical analysis is extended in Tables 10.9 and 10.10, which reveal the distribution of South Asian and specialised screens around the UK. Table 10.9 shows that 71% of all screens showing South Asian films were found in London, with the remainder in the East Midlands, both areas having large British South Asian populations.

Table 10.9 Geographical spread of South Asian screens, 2011

Region	South Asian screens	%
London	5	71.4
East Midlands	2	28.6
Total	**7**	**100.0**

Source: Dodona Research, BFI RSU analysis.

Screens showing mainly specialised films were concentrated in London and the South East, which accounted for 44% of the UK total in 2011 (Table 10.10). The South West had 28 specialised screens and Scotland 27, accounting for 11% and 10% respectively, of such screens. The North East (3.1%), Wales (2.7%) and Northern Ireland (0.8%) had the smallest percentages of specialised screens.

Table 10.10 Geographical spread of specialised screens, 2011

Nation/region	Specialised screens	%
London	80	30.9
South East	35	13.5
South West	28	10.8
Scotland	27	10.4
West Midlands	18	6.9
East of England	16	6.2
East Midlands	13	5.0
Yorkshire and The Humber	13	5.0
North West	12	4.6
North East	8	3.1
Wales	7	2.7
Northern Ireland	2	0.8
Total	**259**	**100.0**

Source: Dodona Research, BFI RSU analysis.

Note: Percentages may not add to 100 due to rounding.

10.8 Exhibitors

The number of exhibitors that owned or programmed 20 or more screens in the UK was 11 in 2011, the same as in 2008, 2009 and 2010 (13 in 2005 and 2006, 12 in 2007), as shown in Table 10.11. The five largest exhibitors owned approximately 75% of all UK screens. The order of the list remained similar to last year except that Reel Cinemas lost three sites and 15 screens, and so moved from seventh to joint eighth (with the same number of screens as Movie House Cinemas) in the list.

Table 10.11 Cinema screens by exhibitors with 20+ screens, 2011

Exhibitor	Sites	Screens	% of total screens
Odeon	111	865	23.0
Cineworld	78	791	21.0
Vue	68	660	17.5
National Amusements	21	274	7.3
Ward Anderson	28	245	6.5
Apollo	14	83	2.2
City Screen	20	57	1.5
Movie House Cinemas	5	39	1.0
Reel Cinemas	12	39	1.0
Merlin Cinemas	11	33	0.9
AMC	2	28	0.7
Others (18 major exhibitors and 312 independent single venue exhibitors)	375	653	17.3
Total	**745**	**3,767**	**100.0**

Source: Dodona Research.

Figures correct as at March 2012.

Notes:
Percentages may not add to 100 due to rounding.
In 2011 Odeon was owned by Terra Firma Capital Partners, a European private equity firm.
Cineworld was the only publicly-quoted exhibitor in the UK. It was formed in 1995 and acquired the former Cine-UK and UGC chains in 2004.
Vue, which acquired Warner Village cinemas in 2003, was previously owned by SBC International Cinemas. The private equity firm Doughty Hanson & Co acquired Vue in 2010.
National Amusements was owned by the family of Sumner Redstone, chairman of US media giant Viacom.
Ward Anderson was headquartered in the Republic of Ireland where it operated the IMC, Omniplex and Cineplex chains.

10.9 Exhibitor revenues

Dodona Research reports that total exhibitor revenue in 2011 stood at £1,237 million, 1.3% higher than in 2010. The total revenue includes net box office receipts, net concession revenue and screen advertising receipts. Net concession revenue stood at £286 million (a decrease of 3% compared with 2010). The top 10 exhibitors had a 90% share of gross box office in 2011 (Table 10.12).

Average ticket prices, calculated by dividing UK box office gross for the year (£1,040 million) by total UK admissions (171.6 million), rose from £5.84 in 2010 to £6.06 in 2011, an increase of 4%.

Table 10.12 Exhibitor share of box office in the UK, 2011

Exhibitor	Market share (%)	Box office gross (£ million)
Cineworld	26.3	273.1
Odeon	25.7	267.1
Vue	22.8	237.1
National Amusements	6.8	70.9
Ward Anderson	4.2	43.5
City Screen	1.6	17.1
Apollo	1.6	16.1
AMC	0.7	7.3
Movie House Cinemas	0.7	7.2
Curzon	0.6	6.3
Sub-total	90.9	945.7
Others	9.1	94.2
Total	**100.0**	**1,040.0**

Source: Rentrak.

Note: Figures may not add to totals due to rounding.

10.10 Digital projection

10.10.1 Digital screens worldwide and in the UK

According to *Screen Digest*, at the end of 2011 there were 63,825 DCI–level (Digital Cinema Initiatives; see Glossary) digital screens worldwide, an increase of 82% compared with the 35,070 screens in 2010. Table 10.13 shows the number of high-end digital (often referred to as 'D-Cinema' in the industry) screens in the world from 2005 to 2011. Worldwide, the numbers of digital screens have almost doubled each year since 2008.

Table 10.13 Number of high-end digital screens in the world, 2005–2011

Region	2005	2006	2007	2008	2009	2010	2011	% of total 2011	% change in screens 2010–2011
Americas	345	2,030	4,666	5,752	8,170	16,734	29,664	46.5	77.3
Asia-Pacific	272	430	919	1,471	3,513	7,920	15,197	23.8	91.9
Europe…	229	532	864	1,542	4,605	10,149	18,521	29.0	82.5
of which UK	*38*	*148*	*296*	*310*	*642*	*1,415*	*2,714*	4.3	91.8
Africa and Middle East	2	4	6	28	84	267	443	0.7	65.9
Total	**848**	**2,996**	**6,455**	**8,793**	**16,372**	**35,070**	**63,825**	**100.0**	**82.0**

Source: *Screen Digest*.

Notes:
Figures valid to March 2012. Figures prior to 2007 include a small number of digital screens using the earlier projectors (1.3K DLP Cinema projectors) that do not meet the DCI specifications. The minimum projector resolution for DCI is 2K (see Glossary).
Percentages may not add to 100 due to rounding.

The rise in the worldwide number of digital screens continued in 2011, with a total increase of 28,755 screens. It was fuelled by the continuing growth of digital screens in the Americas, which had the largest increase in numbers from 2010 to 2011 (12,930, 45% of the worldwide total). Europe's increase in digital screens from 2010 to 2011 accounted for 29% of the worldwide increase, and the Asia-Pacific region accounted for 25%. The number of digital screens in Africa and the Middle East increased from 267 in 2010 to 443 in 2011, but while this increase of 176 screens was a 66% increase for the region, it represented just 1% of the worldwide total increase.

In Europe 21 countries had more than 100 digital screens in 2011, compared with 17 in 2010 as shown in Table 10.14. The top five countries had 62% of all of the high-end digital screens in Europe, the same percentage as in 2010. France increased its number of screens by 91%, from 1,910 in 2010 to 3,653 in 2011, and continues to have the largest number of digital screens in Europe (20% of the European total). The largest percentage increases from 2010 to 2011 were seen in Hungary (a 218% increase from 61 to 194 screens) and in Romania (a 144% increase from 63 to 154 screens), though these countries have small percentages (1% and 0.8% respectively) of Europe's total number of digital screens.

Table 10.14 European countries with 100 or more high-end digital screens, 2010–2011 (ranked by number of screens in 2011)

Country	Year 2010	Year 2011	% of 2011 Europe total	% increase from 2010
France	1,910	3,653	19.7	91.3
UK	1,415	2,714	14.7	91.8
Germany	1,151	2,091	11.3	81.7
Italy	876	1,608	8.7	83.6
Russia	943	1,499	8.1	59.0
Spain	824	1,463	7.9	77.5
Poland	333	650	3.5	95.2
Netherlands	240	560	3.0	133.3
Belgium	283	434	2.3	53.4
Austria	299	430	2.3	43.8
Norway	268	428	2.3	59.7
Portugal	319	397	2.1	24.5
Switzerland	147	339	1.8	130.6
Czech Republic	135	301	1.6	123.0
Denmark	132	286	1.5	116.7
Sweden	147	278	1.5	89.1
Ireland	156	241	1.3	54.5
Hungary	61	194	1.0	218.0
Finland	93	178	1.0	91.4
Romania	63	154	0.8	144.4
Ukraine	84	149	0.8	77.4
Rest of Europe	*270*	*474*	*2.6*	*75.6*
Europe total	**10,149**	**18,521**	**100.0**	**82.5**

Source: *Screen Digest*.

See note to Table 10.12. Figures valid to March 2012.
Note: Percentages may not add to 100 due to rounding.

The overall increase in the number of high-end digital screens in the Asia-Pacific region was slightly higher than in Europe between 2010 and 2011, though the total number of screens was lower. Screen numbers in the region rose by 92% in 2011, from 7,920 to 15,197. China had just over half of the region's digital screens, and Japan, which doubled its number of screens in 2011, had the second highest number of screens in the region. The largest percentage increase in the number of digital screens was in Indonesia, where screen numbers increased by more than 1,000% from 34 to 397. Table 10.15 shows that the top four countries all had more than 1,000 digital screens and accounted for 84% of all digital screens in the region. Every country in the region had more than 100 digital screens by the end of 2011.

Table 10.15 Numbers of high-end digital screens in countries in the Asia-Pacific region, 2010–2011 (ranked by number of screens in 2011)

Country	Year 2010	Year 2011	% of 2011 Asia-Pacific total	% increase from 2011
China	4,204	7,853	51.7	86.8
Japan	980	1,991	13.1	103.2
South Korea	1,133	1,745	11.5	54.0
Australia	452	1,121	7.4	148.0
India	279	535	3.5	91.8
Taiwan	219	404	2.7	84.5
Indonesia	34	397	2.6	1,067.6
Turkey	160	272	1.8	70.0
Hong Kong	155	195	1.3	25.8
Thailand	82	181	1.2	120.7
New Zealand	45	152	1.0	237.8
Malaysia	44	127	0.8	188.6
Philippines	84	112	0.7	33.3
Singapore	49	112	0.7	128.6
Asia-Pacific total	**7,920**	**15,197**	**100.0**	**91.9**

Source: *Screen Digest*.

See note to Table 10.13.

10.10.2 3D and alternative content programming

Of the 2,714 high-end digital screens in the UK in 2011, 1,475 (54%) were 3D-capable digital screens. Some of the popular 3D screenings in 2011 included *Arthur Christmas*, *Harry Potter and the Deathly Hallows: Part 2*, *Pirates of the Caribbean: On Stranger Tides* and two documentaries, *TT3D: Closer to the Edge* and *Cave of Forgotten Dreams*.

Table 10.16 shows the increasing number and proportion of 3D digital screens in the UK. The growth in 3D digital screens coincided with an increase in the availability of 3D content internationally. Forty-seven digital 3D features (films produced in stereoscopic 3D format) were released in 2011, compared with 28 in 2010.

Table 10.16 3D digital screens in the UK, 2006–2011

Year	Number of 3D digital screens	Total digital screens	3D % of all digital screens	Top performing digital 3D title in the UK and Republic of Ireland
2006	5	148	3.4	Tim Burton's The Nightmare Before Christmas 3-D
2007	47	296	15.9	Beowulf
2008	69	310	22.3	Fly Me to the Moon
2009	449	642	69.9	Avatar
2010	1,067	1,415	75.4	Toy Story 3
2011	1,475	2,714	54.3	Harry Potter and the Deathly Hallows: Part 2

Source: *Screen Digest*, Rentrak, BFI RSU analysis.

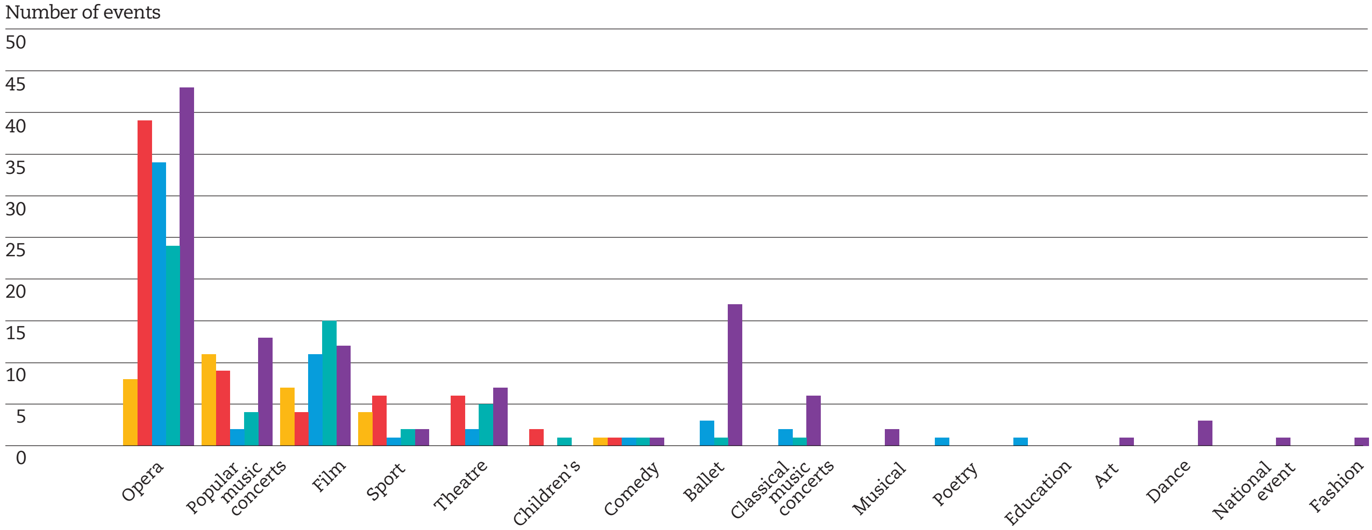
Note: 3D digital screens are capable of screening content made in stereoscopic 3D format. Top performing digital 3D titles in the UK and Republic of Ireland are based on takings from 3D and IMAX screenings.

Alternative content (AC) or non-feature film programming has become a regular feature over the past five years in the UK as more cinemas become equipped with digital screens. The availability of a digital screen base has allowed a wider range of content on the big screen, allowed interactivity between the screen and the audience and potentially improved the use of auditorium capacity during typically quiet periods. Also, since alternative content events usually have only one or two screenings they tend to generate higher occupancy rates than feature films.

In the last few years such events have ranged from live or recorded operas, ballets and pop music concerts to film screenings with live question and answer sessions and live sporting events. There were 109 alternative content events screened in UK cinemas in 2011, more than double 2010's 54 events, according to *Screen Digest* (Figure 10.4).

As in earlier years, in 2011 with 43 events, opera was the most popular form of alternative content, followed by ballet with 17 events. The Met Opera had previously been the company with the most screenings of its performances but its success attracted other cultural institutions into the cinema. In 2011 these included the Bolshoi, the ENO, the Mariinsky Theatre, the Teatro la Fenice, La Scala, the Vienna State Opera and the Zurich Opera House. Popular music was also well represented with 13 events, which included recorded shows of live performances mixed with interviews and documentary, and also live performances. Of the 12 films shown, eight were documentaries and the others included a live element where the film was followed by a question and answer session with members of the cast or production teams.

Figure 10.4 Alternative content events screened in UK cinemas by type of event, 2007–2011



	Opera	Popular music concerts	Film	Sport	Theatre	Children's	Comedy	Ballet	Classical music concerts	Musical	Poetry	Education	Art	Dance	National event	Fashion
2007	8	11	7	4	0	0	1	0	0	0	0	0	0	0	0	0
2008	39	9	4	6	6	2	1	0	0	0	0	0	0	0	0	0
2009	34	2	11	1	2	0	1	3	2	0	1	1	0	0	0	0
2010	24	4	15	2	5	1	1	1	1	0	0	0	0	0	0	0
2011	43	13	12	2	7	0	1	17	6	2	0	0	1	3	1	1

Source: *Screen Digest*.

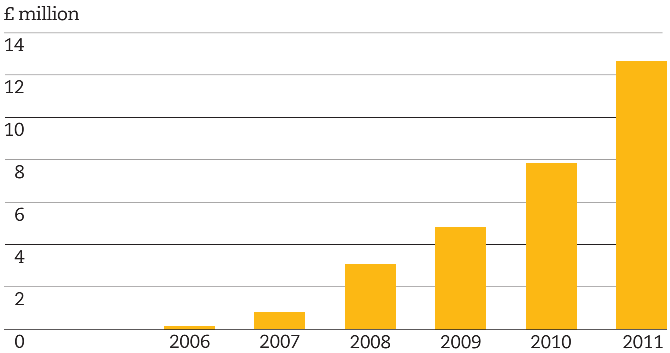
Notes:
Figures include live and recorded events.
'Film' includes film screenings followed by a live 'question and answer' session.
'Children's' includes cartoons or short features that would normally be released on television or DVD, as well as children's films.

More than 60% of the 109 events were shown live. Four events were shown in both live and recorded versions and a further 65 events were shown live only. Of the 65 live events, 19 were shown on Saturdays, and the next most popular days were Sundays and Tuesdays with 10 events each. The least popular days for showing live events were Fridays and Mondays which had four and three events respectively.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Although exhibitors' revenues from alternative content events are small compared with box office revenues for feature films, they continue to grow strongly each year (Figure 10.5). In 2011 revenues from alternative content events were just under £13 million, compared with just under £8 million in 2010 and less than £5 million in 2009. Two examples of high earning alternative content events screened in 2011 are the Met Opera's performance of *Anna Bolena* on 14 October and the 25th anniversary performance of *The Phantom of the Opera* screened live from the Royal Albert Hall on 30 September. According to Rentrak, *Anna Bolena's* box office takings were £135,000 (which, if included with the weekend's films, would have put it in 13th place in the weekend's box office rankings) and *The Phantom of the Opera's* takings were £551,000 (third place in the weekend box office rankings).

Figure 10.5 Revenues from alternative content events screened in UK cinemas, 2006–2011



	2006	2007	2008	2009	2010	2011
Alternative content revenues	0.2	0.8	3.1	4.9	7.9	12.7

Source: *Screen Digest*.

10.11 Community cinema in the UK

The screening of feature films in the UK is not limited to cinemas belonging to the major cinema operators. There is a thriving sector of voluntary providers which make a wide variety of films available to local communities which are often underserved by the commercial operators. This sector is often referred to as community cinema. Members of local communities are generally more involved in the programming of such cinemas than their commercial counterparts. Screenings of films in this sector are in venues such as village halls, mixed arts spaces, independent cinemas and the like.

The British Federation of Film Societies (BFFS) has surveyed its members on an annual basis since 2005/06 in order to measure the size, composition and geographical distribution of the community cinema sector in the UK. Here we present a summary of the key findings from the 2010/11 survey.

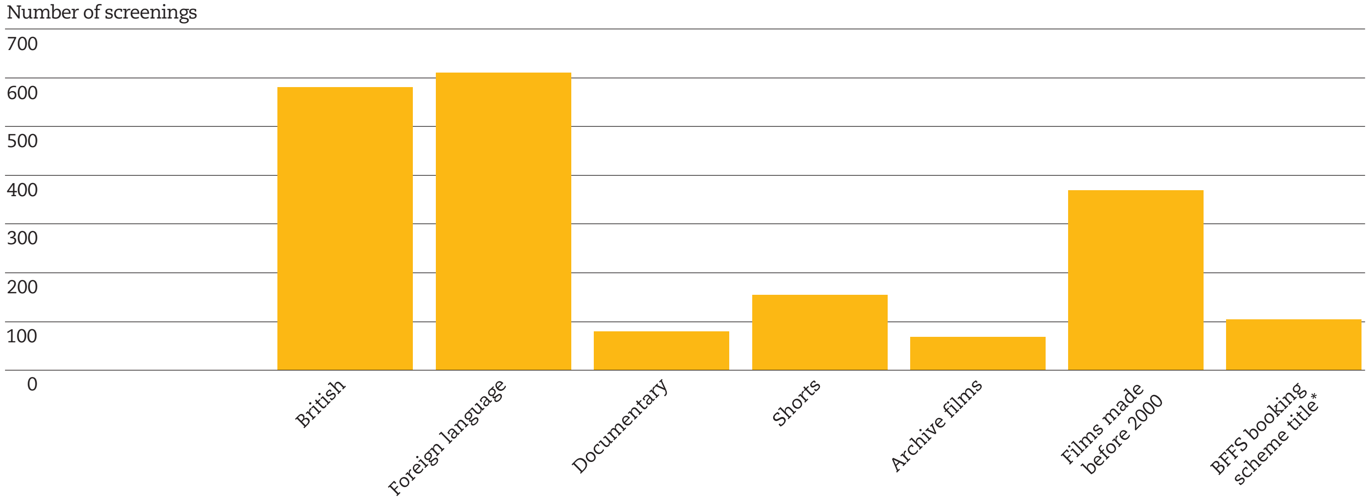
While many film societies and community cinemas have been in existence over a long period, new ones are established all the time. Over half (58%) of the responding organisations in the latest survey were established in 2000 or later, while 16% were established in the 1960s or earlier.

Most of the film societies that responded (79%) operated a membership system in 2010/11 (up slightly from 76% in 2009/10) and the average membership size was 162. The membership of responding societies stood at 13,474. The BFFS estimates a total membership of around 54,000 across all film societies known to it.

The average full annual membership fee was £23.50 (down from £25.19 in 2009/10). Just under one third of societies that operated a membership system charged an additional admission fee (27%). The average admission fee charged was £3.80. A minority of responding societies offered season tickets (17%). Season ticket charges ranged from £13.00 to £55.00, and the average number of season ticket holders in a film society stood at 100 in 2010/11.

The responding organisations programmed a total of 528 different titles during the 2010/11 season. British films accounted for 26% of the films screened, and 27% of the films shown were in a foreign language (up from 20% in 2009/10). More than two thirds (70%) of titles were screened by only one film society (up from 62% in 2009/10), indicating the diversity of programming choices made by individual societies. However, some titles proved popular choices across many film societies, and 13 films were programmed by 10 or more societies. Figure 10.6 shows the number of screenings by category of film. Titles sourced via the BFFS booking scheme accounted for 104 screenings.

Figure 10.6 Number of community cinema screenings by type of film, 2010/11



	British	Foreign language	Documentary	Shorts	Archive films	Films made before 2000	BFFS booking scheme title*
Number of screenings	581	610	79	154	68	369	104

Source: BFFS.

Notes:
* The booking scheme provides BFFS members with access to a catalogue of over 400 non-mainstream films.
Figures include both film societies and community cinemas.

Eight of the films programmed by 10 or more respondents in 2010/11 were British, and three were in a foreign language. The three most programmed films were *An Education* (in English), *The White Ribbon* (in German), and *The Secret in Their Eyes* (in Spanish), all of which were first released in 2009. Just over half (53%, the same as in the previous two years) of all responding organisations held special events in addition to screenings in 2010/11.

The average audience size in 2010/11 was 70, with the largest being 260 and the smallest being six admissions. The sum total of all admissions from responding organisations was 119,355. If this is extrapolated to all societies, the BFFS estimates that the total number of admissions in 2010/11 would have been around 255,000. One third of community cinemas saw an increase in their annual admissions, and over half (51%) recorded roughly the same number (at a time when commercial cinema admissions were flat).

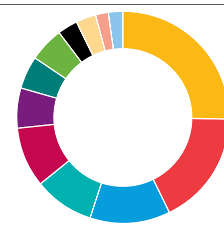
The most commonly used format for screenings was DVD (used ‘usually’ or ‘sometimes’ by 97% of responding organisations). Blu-ray was ‘usually’ used for screening purposes by 22%, up from 5% the previous year, and a further 29% ‘sometimes’ screened films in this format. Just 11% of responding societies still used VHS, one in five (19%) project using 35mm, and 7% ‘usually’ or ‘sometimes’ use 16mm. One in 10 screened via digital cinema ‘usually’ or ‘sometimes’ in 2010/11, and 9% ‘sometimes’ used online downloads/streaming.

The majority of film societies used only one venue for screenings (82%), and public buildings (eg civic centres and village or town halls) were the most common type (used by 51% of respondents). Other types of venue included school halls or college/university lecture theatres (used by 25% of respondents), theatres (17%), commercial cinemas (12%) and mixed arts centres (9%). Responding societies and community cinemas also used cafes, pubs, church halls, social clubs, leisure centres and museums for screenings.

Film societies and community cinemas enhance film provision in thematic or geographical areas otherwise underserved by commercial cinemas. On average, film societies and community cinemas were located around seven miles from the nearest commercial cinema. Moreover, 39% operated in rural areas (with 10% in remote rural areas more than 10 miles from the nearest settlement) compared with less than 3% of commercial screens (see Table 10.8). Figure 10.7 shows the percentage share of BFFS membership by nation and region.

Figure 10.7 Share of BFFS membership by nation and region, 2010/11

	%
South West	25
South East	17
Scotland	12
North West	9
Yorkshire and The Humber	9
Wales	6
East of England	5
London	5
East Midlands	3
West Midlands	3
North East	2
Northern Ireland	2



Source: BFFS.

Note: Percentages may not add to 100 due to rounding.

The South East and South West regions accounted for nearly two fifths (38%) of the total annual film society and community cinema admissions in 2010/11. In comparison, the Southern and South West ISBA regions accounted for only 12% of total admissions to commercial cinemas in 2011 (see Table 10.4).

- For cinema admissions and box office see Chapter 1 (page 8)
- For more on 3D films see Chapter 2 (page 18)
- For information on specialised films in 2011 see Chapter 5 (page 46)
- For a look at cinema audiences see Chapter 15 (page 140)
- For employment in the exhibition sector see Chapter 22 (page 198)

- Website for British Federation of Film Societies (BFFS): www.bffs.org.uk

*Image: **Senna** © 2011 Universal Pictures. Courtesy of Universal Studios Licensing LLC*

Chapter 11:

Film on physical video

Despite falling revenues, physical video remains the most important element of the film value chain. In 2011, feature film video sales and rentals in the UK generated over £1.4 billion.

Facts in focus:

- The combined sales and rental market for all video on physical media in 2011 was £2 billion, and feature film on video accounted for £1.4 billion.
- There were 86 million feature film physical video rentals in 2011 (84 million in 2010) and 152 million sales (160 million in 2010).
- Film accounted for 74% of the volume of the video sales market and 67% of the value. UK films accounted for around 22% of all films sold on video.
- The most popular purchase on DVD in 2011 was *Harry Potter and the Deathly Hallows: Part 2*.
- Online video rental with postal delivery accounted for 46% of all feature film video rental transactions in 2011.

11.1 Film in the video retail market

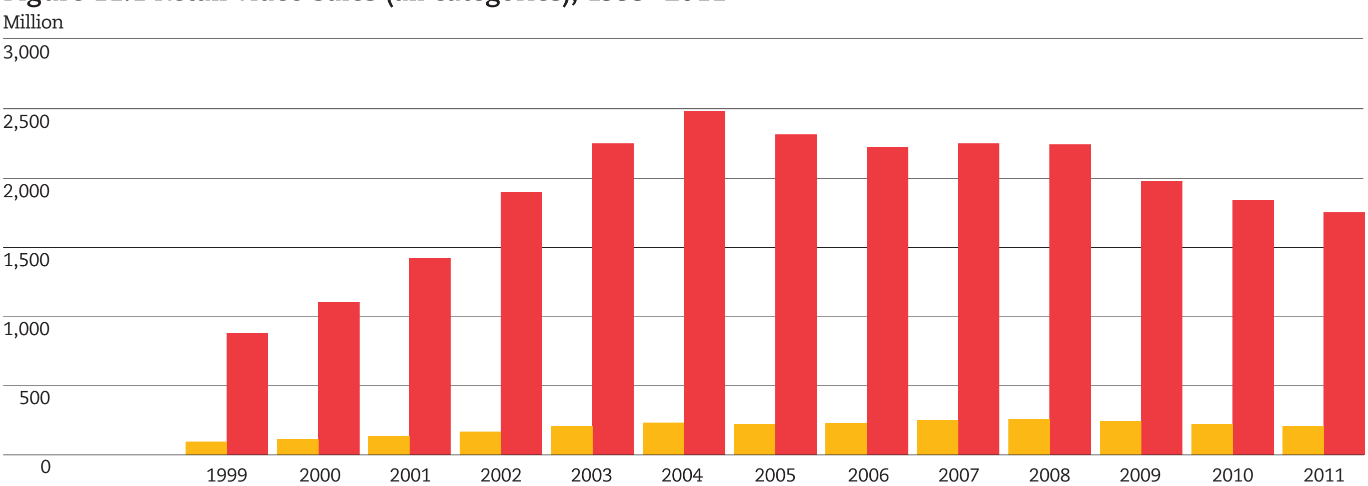
'Video' is used in this chapter as the generic description of all physical video, including DVD, Blu-ray and other physical formats, in line with the British Video Association's (BVA) definition, and does not include downloads. (For information on films rented or purchased by download or streaming, see Chapters 12 and 14.)

In 2011, 207 million videos in all categories were sold, down 4.9% on 2010. As Figure 11.1 shows, the total market value was £1,749 million, down 7.3% from 2010's market value of £1,839 million. (The value data have been revised from the figures published last year which showed a market value of £2,089 million for 2010.)

DVDs accounted for the majority of all categories of video sales (87% by value and 92% by volume). Blu-ray disc sales accounted for 12.7% of total video sales by value and 7.4% of sales by volume in 2011 (compared with 10.8% by value and 5.8% by volume in 2010).

Feature film represented approximately 67% of the retail video market by value (£1,165 million) and 74% by volume. UK films accounted for around 22% of sales, by volume, of film on video.

Figure 11.1 Retail video sales (all categories), 1999–2011



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Volume (million)	96	114	135	169	208	234	222	228	249	257	243	223	207
Value (£ million)	878	1,101	1,417	1,896	2,245	2,478	2,309	2,219	2,246	2,237	1,975	1,839	1,749

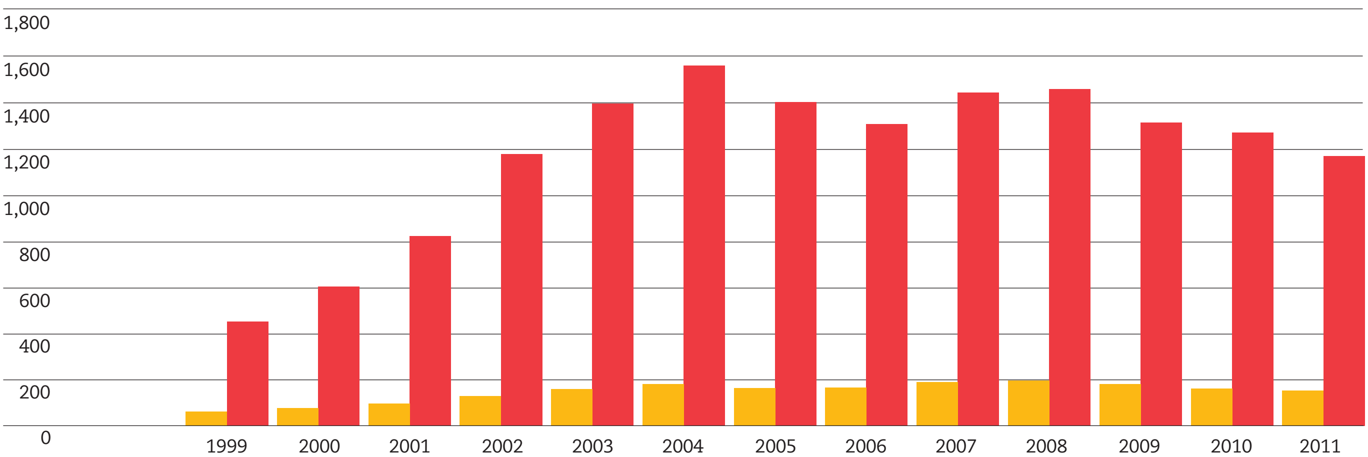
Source: *Screen Digest*.

Data in this table include all categories of retail video: film, TV, sport, fitness, etc.

The number of films sold on video more than trebled between 1999 and 2008, from 61 million units to 196 million, before falling in 2009 to 180 million. The decrease in sales has continued since 2009, with 160 million units sold in 2010 and 152 million sold in 2011 (Figure 11.2).

As Figure 11.3 shows, the average unit price increased with the introduction of DVD in the late 1990s to reach a peak in 2002, but there has been a general downward trend since then. The average price increased in 2010 compared with 2009, but fell again to £7.64 in 2011 (compared with £7.90 in 2010).

Figure 11.2 Film on video retail sales, 1999–2011

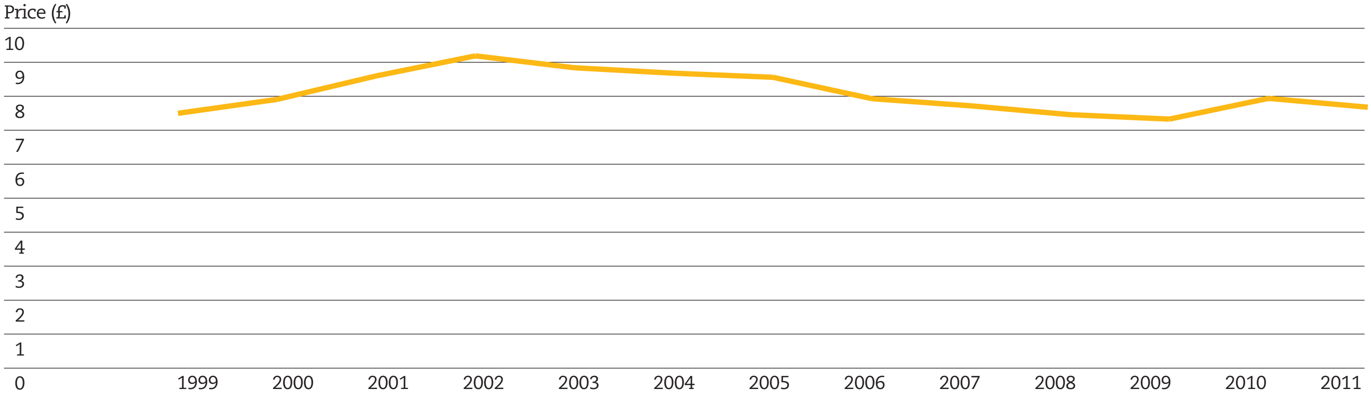


	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Volume (million)	61	76	96	128	158	180	164	165	188	196	180	160	152
Value (£ million)	451	601	821	1,175	1,392	1,557	1,399	1,302	1,440	1,454	1,311	1,267	1,165

Source: BFI RSU analysis of Official Charts Company and BVA data.

Note: Includes some feature films which would be classified as 'children's' videos in the BVA Yearbook.

Figure 11.3 Average retail price of film per unit, 1999–2011



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Price	7.46	7.87	8.56	9.15	8.80	8.64	8.52	7.89	7.68	7.42	7.29	7.90	7.64

Source: BFI RSU analysis of Official Charts Company and BVA data.

Table 11.1 shows the top selling films on video in 2011. The two instalments of *Harry Potter and the Deathly Hallows*, which between them sold nearly five million units, took first and second place. *Harry Potter and the Deathly Hallows: Part 2* was the highest grossing film at the 2011 UK box office; the second and third highest earning films, *The King's Speech* and *The Inbetweeners Movie*, were fourth and third in the video chart respectively.

Eight of the top 10 selling films on video were films which were released theatrically in 2011, and the other two (*Harry Potter and the Deathly Hallows: Part 1* and *Inception*) were released in 2010. *Inception* was also in the top selling video chart for 2010 but *Harry Potter and the Deathly Hallows: Part 1* was released on video too late in the year to make the 2010 chart.

The two *Harry Potter and the Deathly Hallows* films were also the highest selling film titles on Blu-ray disc in 2011, followed by *Transformers: Dark of the Moon*.

Table 11.1 Top 10 best selling films on physical video formats, 2011

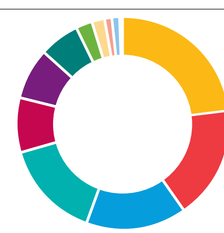
	Title	Country of origin	Distributor
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	Warner Bros
2	Harry Potter and the Deathly Hallows: Part 1	UK/USA	Warner Bros
3	The Inbetweeners Movie	UK	Channel 4 DVD
4	The King's Speech	UK	Momentum
5	Pirates of the Caribbean: On Stranger Tides	UK/USA	Walt Disney
6	Paul	UK/USA	Universal
7	Transformers: Dark of the Moon	USA	Paramount
8	The Hangover Part II	USA	Warner Bros
9	Bridesmaids	USA	Universal
10	Inception	UK/USA	Warner Bros

Source: Official Charts Company, BVA.

Comedy was the highest selling genre of films sold on video in 2011, accounting for 23% of the market (20% in 2010) as Figure 11.4 shows. Drama was the next most popular with 17% of all sales, followed by action/adventure with 15%. (It should be noted that these categories, as defined by the BVA, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in Chapter 4.)

Figure 11.4 Sales breakdown by film genre, 2011

Genre	%
Comedy	23.1
Drama	17.3
Action/adventure	15.4
Family	14.8
Sci-fi	8.3
Thriller	7.9
Horror	6.1
War	2.6
Musical	1.8
Western	1.3
Documentary	1.0
Anime	0.3
Adult	0.1
Bollywood	0.01



Source: Official Charts Company, BVA.

Note: These genres are assigned by the BVA and the categories are not the same as those from Chapter 4.

The list of the top 10 UK performers on sell-through video in 2011 (Table 11.2) features seven UK qualifying titles which are also in the overall top 10 for the year. These include both *Harry Potter and the Deathly Hallows* films, and the all time top two UK independent films at the UK box office, *The King's Speech* and *The Inbetweeners Movie*. Also appearing in this list is *Senna*, a documentary on the life of Brazilian racing driver Ayrton Senna.

The two *Harry Potter and the Deathly Hallows* films, *The Inbetweeners Movie* and *Pirates of the Caribbean: On Stranger Tides* also appear in the list of top 10 selling film titles on Blu-ray disc in 2011.

Table 11.2 Top 10 best selling UK qualifying films on physical video formats, 2011

	Title	Country of origin	Distributor
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	Warner Bros
2	Harry Potter and the Deathly Hallows: Part 1	UK/USA	Warner Bros
3	The Inbetweeners Movie	UK	Channel 4 DVD
4	The King's Speech	UK	Momentum
5	Pirates of the Caribbean: On Stranger Tides	UK/USA	Walt Disney
6	Paul	UK/USA	Universal
7	Inception	UK/USA	Warner Bros
8	Gnomeo & Juliet	UK/USA	eOne Films
9	Senna	UK/USA	Universal
10	The Chronicles of Narnia: The Voyage of the Dawn Treader	UK/USA	20th Century Fox

Source: BFI RSU analysis of Official Charts Company data.

The list of top 10 UK independent films sold on video in 2011 is topped by *The Inbetweeners Movie* followed by *The King's Speech*. In third place is *Kick-Ass* which was the highest selling independent UK film on video in 2010. Only one other film from the 2011 chart, *Harry Brown*, also appeared in the 2010 chart. All other films in the latest list are 2011 releases, or were released too late in 2010 to appear in that year's chart (Table 11.3).

Table 11.3 Top 10 best selling UK independent films on physical video formats, 2011

	Title	Country of origin	Distributor
1	The Inbetweeners Movie	UK	Channel 4 DVD
2	The King's Speech	UK	Momentum
3	Kick-Ass	UK/USA#	Universal
4	Four Lions	UK	Elevation Sales/ StudioCanal
5	The Eagle	UK/USA#	Universal
6	Harry Brown	UK	Elevation Sales/Lions Gate
7	Horrid Henry: The Movie	UK	eOne Films
8	Made in Dagenham	UK	Paramount
9	Anuvahood	UK	Revolver
10	Ironclad	UK/USA#	Warner Bros

Source: BFI RSU analysis of Official Charts Company data.

Kick-Ass, *The Eagle* and *Ironclad* were made with independent (non-studio) US support.

Table 11.4 shows the top 10 best selling feature documentaries on video in 2011. This list does not include documentaries which are based on music concerts. The top selling documentary on video in 2011 was *Senna*, the all time highest grossing UK documentary at the UK box office. In second place in the chart is another documentary about motor sport, the 3D film about the Isle of Man TT motorcycle races, *TT3D: Closer to the Edge*. In third place is another sporting documentary, *Fire in Babylon*, a film about the West Indian cricket teams of the 1970s and 1980s. These top three documentaries were released theatrically in 2011 but the chart also includes some older films. *Tyson* was released in the UK in 2009, *March of the Penguins* was released in 2005 and *Touching the Void* was released in 2003. Six of the top 10 documentaries were UK films.

Table 11.4 Top 10 best selling documentary films on physical video formats, 2011

	Title	Country of origin	Distributor
1	Senna	UK/USA	Universal
2	TT3D: Closer to the Edge	UK	eOne Films
3	Fire in Babylon	UK	Revolver
4	Exit Through the Gift Shop	UK	Revolver
5	March of the Penguins	Fra	Warner Bros
6	Inside Job	USA	Sony Pictures
7	Knuckle	UK/Ire	Revolver
8	Catfish	USA	Momentum
9	Tyson	USA	Revolver
10	Touching the Void	UK	Channel 4 DVD

Source: BFI RSU analysis of Official Charts Company data.

Note: Recordings of music concerts are not included.

Swedish and Chinese films accounted for nine of the top 10 selling foreign language films on video in 2011 (Table 11.5). The top five films in the list are Swedish including all three Millennium trilogy films. At number five in the list is Tomas Alfredson's *Let the Right One In*, whose video sales may have been boosted by the release of the US remake, *Let Me In*, at the end of 2010. The only film in the list not from either Sweden or China is Guillermo del Toro's 2006 film, *Pan's Labyrinth*.

Table 11.5 Top 10 best selling foreign language films on physical video formats, 2011

	Title	Country of origin	Distributor
1	The Girl Who Played with Fire	Swe/Den/Ger	Momentum
2	The Girl with the Dragon Tattoo	Swe/Den/Ger	Momentum
3	The Girl Who Kicked the Hornets' Nest	Swe/Den/Ger	Momentum
4	Arn: The Knight Templar	Swe/UK	High Fliers
5	Let the Right One In	Swe	Momentum
6	Ip Man 2	Hong Kong/China	Show Box
7	Ip Man	Hong Kong/China	Show Box
8	Pan's Labyrinth	Mex/Spa/USA	Elevation Sales/ StudioCanal
9	Confucius	China	Show Box
10	Little Big Soldier	China/Hong Kong	Show Box

Source: BFI RSU analysis of Official Charts Company data.

Classic titles also remain popular, due in part to the release of anniversary and other special editions. Films which sold well in 2011 include *Breakfast at Tiffany's, Gone With the Wind*, *Mary Poppins*, *The Sound of Music*, *To Kill a Mockingbird* and *The Wizard of Oz*, which together accounted for more than half a million sales during the year.

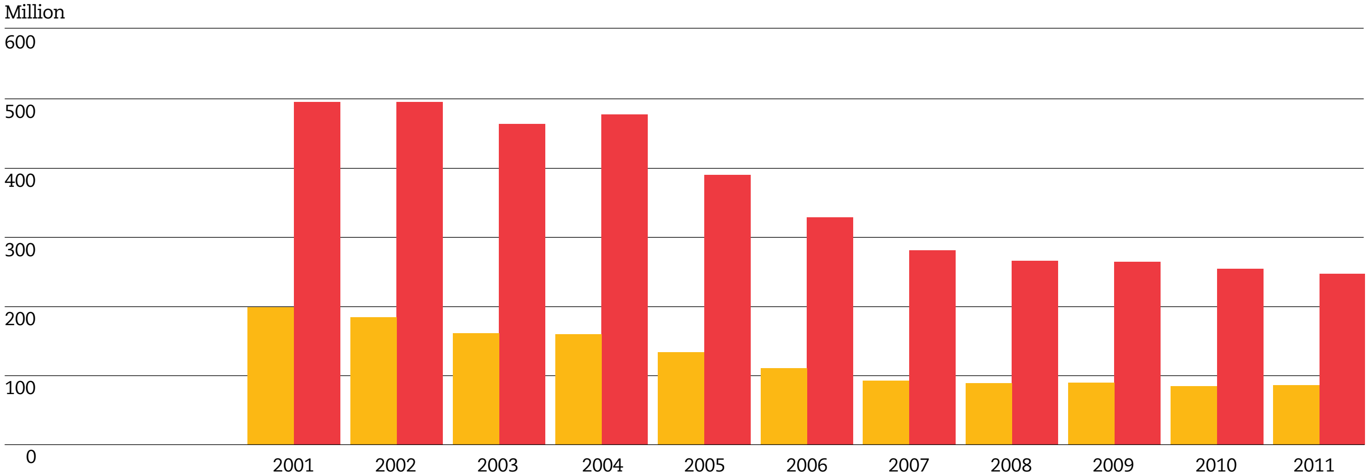
11.2 Film in the video rental market

There were 96 million rental transactions of all categories of physical video in 2011, with a total value of £274 million, including over-the-counter and online rentals. (The latest *Screen Digest*/BVA data show that in 2010 there were 93 million transactions with a value of £278 million. These data have been revised from the figures published last year of 72 million transactions with a value of £208 million. The data for feature film rentals have also been revised.)

Film on video rentals in the UK in 2011 totalled 86 million, with an average value of £2.85. Online renting of physical discs (with postal delivery) accounted for 52% of rental transactions of all categories of video, and 46% of film on video rental transactions.

The number of feature film rental transactions in 2011 was two million more than 2010's 84 million, but the value of the physical rental market fell from £253 million in 2010 to £246 million in 2011. The peak value of the physical rental market was £494 million in 2001 and the current value of the market is approximately half that (Figure 11.5). The decrease in the market's value is due mainly to the rapid decline of the over-the-counter rental market in the face of competition from multi-channel television, rental downloads (from providers such as iTunes), film theft and the availability and lower cost of retail DVDs.

Figure 11.5 Film on video rental market, 2001–2011



	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Transactions (million)	198	183	160	159	133	110	92	88	89	84	86
Value (£ million)	494	494	462	476	389	327	280	265	263	253	246

Source: *Screen Digest*, BVA.

The most popular genres of rented films were drama and comedy both of which accounted for 22% of rentals, followed by action and children's/family titles (Figure 11.6). (It should be noted that these categories, as defined by Kantar Worldpanel, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in Chapter 4.)

Figure 11.6 Video rental share by genre, 2011

	%
Drama	22.4
Comedy	21.9
Action	17.6
Children's/family	10.5
Thriller	9.5
Horror	7.2
Sc-fi	5.2
Others	5.7

Source: Kantar Worldpanel, BVA.

Note: These genres are assigned by Kantar Worldpanel and the categories are not the same as those from Chapter 4.

The list of top 10 online rentals in 2011 is topped by *The King's Speech*, which was the fourth highest selling film on video of 2011 (Table 11.6). No other film appears in both charts.

Table 11.6 Top 10 online video rentals*, 2011

	Title	Country of origin	Distributor
1	The King's Speech	UK	Momentum
2	Black Swan	USA	20th Century Fox
3	The Social Network	USA	Sony Pictures
4	True Grit	USA	Paramount
5	Unknown	USA/Ger	Elevation Sales/StudioCanal
6	127 Hours	UK/USA	20th Century Fox
7	Limitless	USA	Momentum
8	The Tourist	USA/Fra	Elevation Sales/StudioCanal
9	The Fighter	USA	Momentum
10	Due Date	USA	Warner Bros

Source: BVA.

* 'Online rental' refers to online ordering with postal delivery. See Glossary.

The list of top 10 over-the-counter rentals in 2011 shows a different pattern from the online rentals, with five titles appearing in both rental lists (Table 11.7). The five titles are *Unknown*, *Limitless*, *Due Date*, *The Social Network* and *The Tourist*. Only *Paul* from this chart also appears in the list of top 10 selling films on video in 2011.

Table 11.7 Top 10 over-the-counter video rentals, 2011

	Title	Country of origin	Distributor
1	Unknown	USA/Ger	Elevation Sales/StudioCanal
2	Limitless	USA	Momentum
3	Due Date	USA	Warner Bros
4	Source Code	USA/Fra	Elevation Sales/StudioCanal
5	Paul	UK/USA	Universal
6	Just Go With It	USA	Sony Pictures
7	The Social Network	USA	Sony Pictures
8	Little Fockers	USA	Paramount
9	The Tourist	USA/Fra	Elevation Sales/StudioCanal
10	The Adjustment Bureau	USA	Universal

Source: BVA.

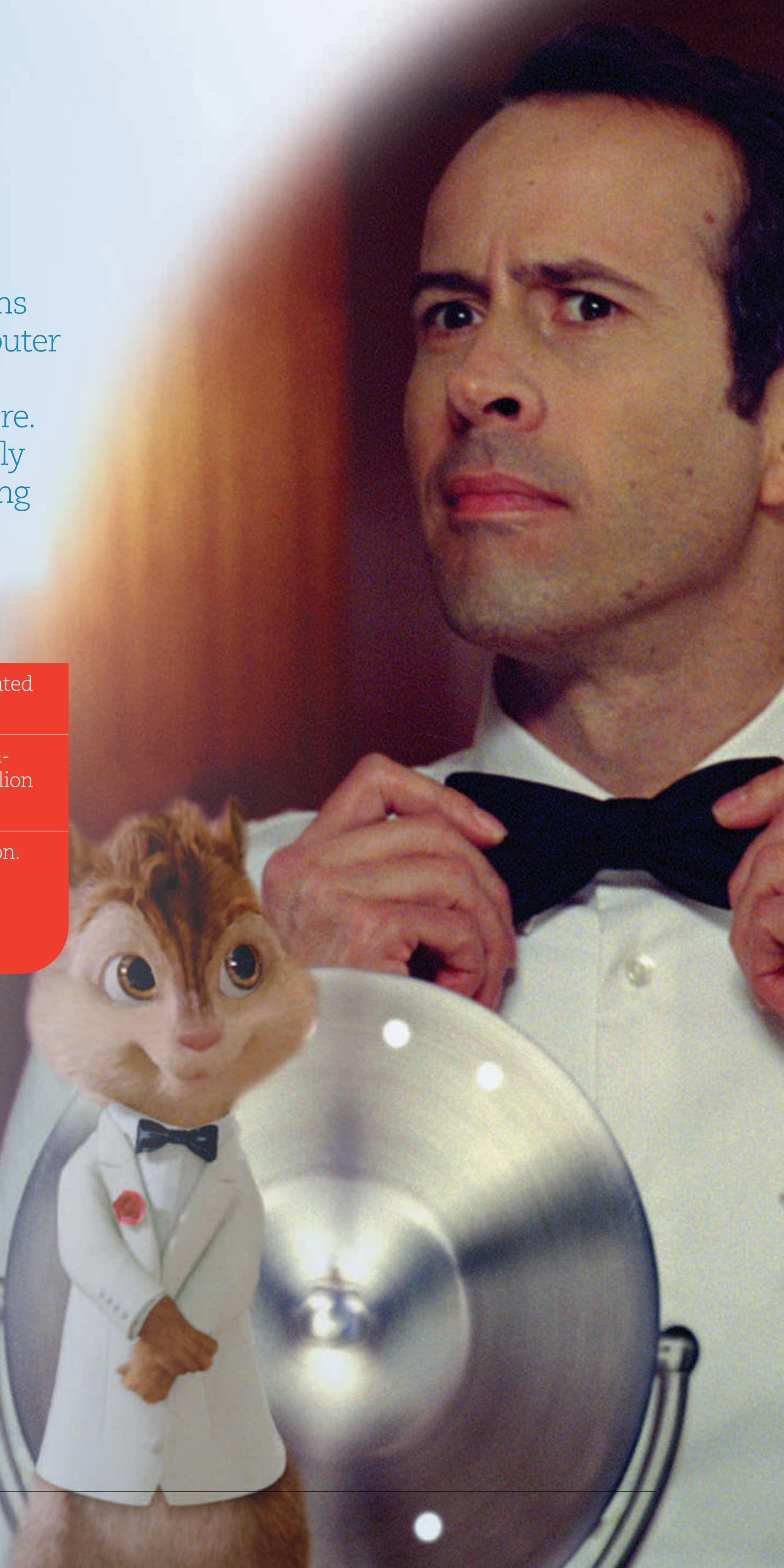
11.3 Hardware

According to the BVA, in 2011 some 1.3 million Blu-ray stand-alone players were sold, increasing the cumulative sales since launch by 60%. BVA and *Screen Digest* figures also show that by the end of the year 12% of households owned a Blu-ray player and nearly 93% of households owned at least one video player (including all physical formats).

► For more information about top films at the UK box office see Chapter 2 (page 18)
► For more information about the UK film market as a whole see Chapter 14 (page 134)

Chapter 12:

Video on Demand



Video on Demand (VoD) brings films directly to our television and computer screens and, increasingly, to our portable devices, anytime, anywhere. Although revenues remain relatively small, there is evidence of increasing consumer engagement with these services.

Facts in focus:

- The total Video on Demand film market was estimated to be worth £166 million in 2011, up 13% on 2010.
- 15 million households were able to access television-based VoD in 2011 and spent an estimated £114 million on films.
- Online film revenues increased by 32% to £52 million.

12.1 The television-based VoD market

The Video on Demand (VoD) market in the UK is a highly competitive sector with rival services engaged in fierce competition to gain access to studio and independent content.

VoD services in the UK can be divided into television-based and online services. Around 15 million UK households were able to access VoD films via television in 2011 with the market increasing from an estimated £107 million in 2010 to £114 million in 2011 (Figure 12.1).

In terms of television-based VoD providers, approximately 3.8 million Virgin Media TV subscribers are able to access a true-VoD service (a system which streams content in real time from a server to the viewer) while the 10.5 million Sky satellite subscribers are able to access a push VoD service, offering films which can then be stored on personal video recorders (PVRs) through the Sky Anytime service. Alternatively, broadband subscribers are able to access a true VoD service via the Sky Anytime+ platform.

The BT Vision IPTV service (717,000 subscribers) offers true-VoD access to its film catalogue. For digital terrestrial television (DTT) viewers, Picturebox via Top Up TV Anytime offers a limited number of titles available through a compatible Freeview+ PVR.

12.2 Online VoD

Despite overall broadband penetration of 76% (fixed and mobile) and average broadband speeds increasing from 6.2 Mbps to 7.6 Mbps the online VoD market remained small in 2011, with estimated revenues of around £52 million, including approximately £600,000 from subscription services (Figure 12.1). However, this represents a 32% increase on 2010 and a 735% increase on 2008.

While television-based providers are increasingly adding online VoD services to their offers, online ‘over-the-top’ VoD providers LoveFilm and Netflix are competing to become the dominant player in this growing market and, backed by considerable acquisitions budgets, are building up large libraries of content.

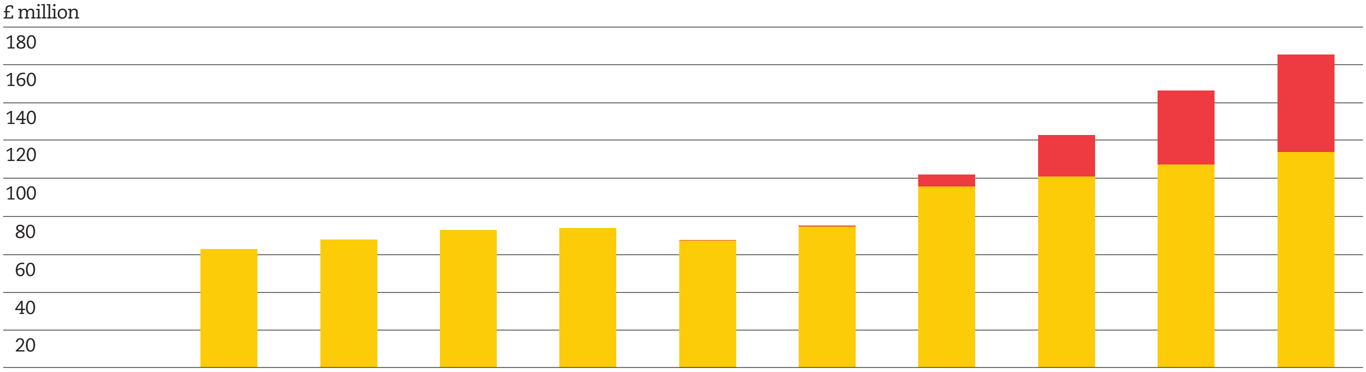
Online VoD services in the UK employ four basic types of business model:

- Rental VoD – one-off rental, also known as download to rent (DTR);
- Retail or download-to-own (DTO) or electronic-sell-through (EST);
- Subscription VoD (SVoD) – unlimited access to content for a fixed monthly sum; and
- Free/advert-supported VoD.

Screen Digest estimates that the combined value of the television-based and online VoD film market was £166 million in 2011, up from £146 million in 2010. This represents approximately 4% of the total UK filmed entertainment market.

Data on the performance of individual titles are still unavailable for this sector and we are therefore unable to report statistics on the top performing titles or the market share of UK, independent or specialised films.

Figure 12.1 Value of the UK VoD market, 2002–2011



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Television-based VoD	62.6	67.6	72.7	73.5	67.2	74.5	95.7	100.9	107.3	113.9
Online VoD	0.0	0.0	0.0	0.0	0.1	0.5	6.2	22.2	39.1	51.8
Total value of VoD market (£ million)	**62.6**	**67.6**	**72.7**	**73.5**	**67.3**	**75.0**	**101.9**	**123.1**	**146.4**	**165.7**

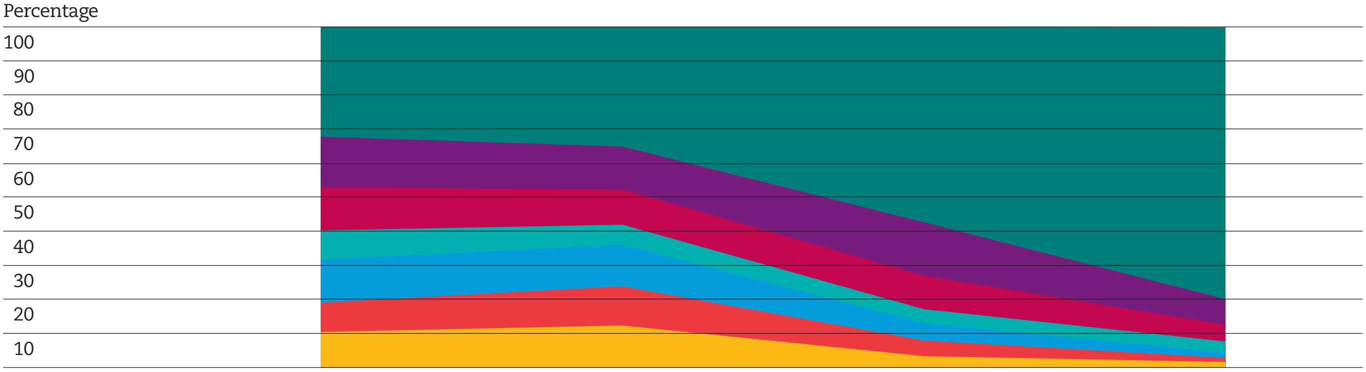
Source: Screen Digest.

12.3 Viewings of on demand films

Although the VoD market remains small, there are signs of increasing consumer engagement. In *Opening our eyes*[1], the recent report on the UK public's views on the cultural contribution of film, one in 10 of the UK sample watched a film downloaded or streamed from the internet at least once a week, and just over one in five (23%) did so at least once a month (Figure 12.2). In terms of portable device consumption, 5% watched a film on a mobile device at least once a week, and 11% did so at least monthly (Figure 12.3).

1 *Opening our eyes: How film contributes to the culture of the UK*, a report for the BFI by Northern Alliance and Ipsos MediaCT, 2011.

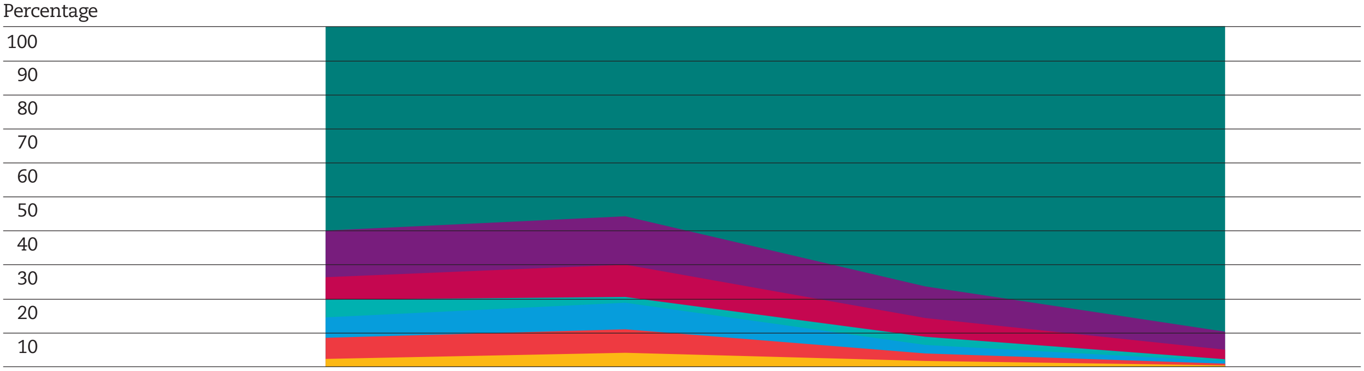
Figure 12.2 Frequency of viewing downloaded/streamed films by age, 2011



	15–24	25–34	35–54	55+
Never	32.2	35.1	57.3	79.8
Less than once every 6 months	14.9	12.6	15.7	7.5
Once every 2–6 months	12.6	10.3	9.8	4.9
Once a month	8.6	5.9	4.1	3.3
2–3 times a month	12.6	12.2	5.1	1.5
Once a week	8.6	11.5	4.6	1.2
Several times a week	10.5	12.4	3.4	1.7

Source: BFI.

Figure 12.3 Frequency of viewing films on mobile devices by age, 2011



	15–24	25–34	35–54	55+
Never	60.0	55.8	76.5	89.8
Less than once every 6 months	13.7	14.2	9.3	5.3
Once every 2–6 months	6.6	9.5	5.5	2.8
Once a month	5.2	1.7	2.4	0.6
2–3 times a month	6.0	7.8	2.5	0.7
Once a week	6.2	6.9	2.2	0.5
Several times a week	2.3	4.1	1.7	0.4

Source: BFI.

- For more information on film on physical video see Chapter 11 (page 111)
- For more information on film on television see Chapter 13 (page 124)
- For an overview of the film market as a whole see Chapter 14 (page 134)
- For more information on film audiences see Chapter 15 (page 140)

Chapter 13:

Film on UK television

In terms of viewer numbers, the single most important platform for film consumption is television. Viewers had a choice of over 5,500 film titles across all channels in 2011, and the cumulative film audience was an estimated 3.9 billion.

Facts in focus:

- There were 5,570 unique film titles on television in 2011, including 2,013 on terrestrial, 1,475 on pay TV film channels and 3,527 on other digital film channels.
- There were 2,221 film transmissions (2,013 unique titles) on terrestrial channels, up from 2,075 in 2010. Of these, 478 (22%) were UK films, and 60 (3%) were foreign language films.
- The top film on terrestrial television was ***Indiana Jones and the Kingdom of the Crystal Skull*** on BBC One, with 7.9 million viewers.
- There were 3.9 billion viewings of feature film across all television formats (except pay-per-view) in 2011 – over 22 times the number of cinema admissions.

13.1 Programming on the terrestrial channels

Table 13.1 shows the number of feature films broadcast on the five terrestrial channels in 2011 and the number of UK titles broadcast in that time. UK films are broken down into older titles (more than eight years old) and recent theatrical releases (released in the last eight years). Here, UK films include all titles listed as UK originated by the Broadcasters' Audience Research Board (BARB), plus UK co-productions given other nationalities (mostly USA) in the BARB data.

There were 2,221 films on terrestrial television in 2011, up from 2,075 in 2010, an average of over six films a day.

Table 13.1 Feature films broadcast on terrestrial television, 2011

Channel	Number of films broadcast	Number of UK films broadcast	UK films as % of total	Number of recent* UK films broadcast	Recent* UK films as % of total films broadcast
BBC One	268	32	12	24	9.0
BBC Two	419	135	32	62	14.8
ITV1	388	118	30	56	14.4
Channel 4	621	143	23	35	5.6
Channel 5	525	50	10	15	2.9
Total	**2,221**	**478**	**22**	**192**	**8.6**

Source: Attentional, BFI RSU analysis.

* A recent film is one which has been theatrically released, or intended for theatrical release, in the UK since 2003.

Sixty foreign language films were screened on the main terrestrial channels in 2011, 3% of the total, slightly up from 59 in 2010 (also 3% of the total), as Table 13.2 shows. With 880,000 viewers, the top foreign language film was the Jackie Chan martial arts comedy *Rumble in the Bronx* (dubbed in English from the original Cantonese), which was also the most popular foreign language film in 2009, followed by South Korean thriller *Oldboy* with 350,000 viewers on Channel 4.

Table 13.2 Foreign language films broadcast on terrestrial television, 2011

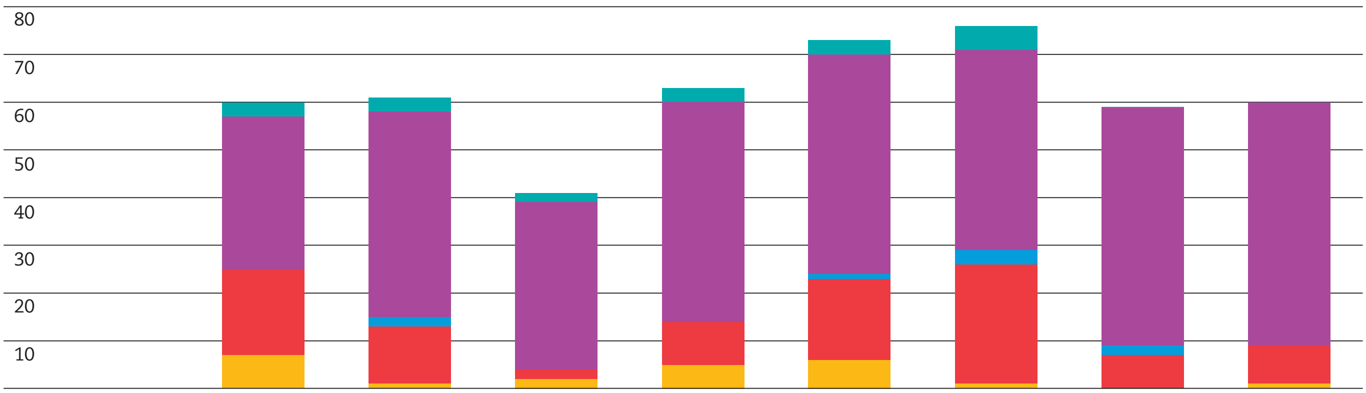
Channel	Number of foreign language films broadcast	% of channel's film output	Average audience (million)	Top rated foreign language film	Audience (million)
BBC One	1	0.4	0.9	Rumble in the Bronx	0.9
BBC Two	8	1.9	0.2	Spirited Away	0.3
ITV1	0	0.0	–	–	–
Channel 4	51	8.2	0.1	Oldboy	0.3
Channel 5	0	0.0	–	–	–
Total	**60**	**2.7**	**0.1**	**–**	**–**

Source: Attentional, BARB, BFI RSU analysis.

Figure 13.1 illustrates the number of foreign language films broadcast on terrestrial television between 2004 and 2011. Channel 4 has consistently shown the most foreign language films, although overall numbers remain low, with a peak of 76 titles in 2009.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 13.1 Number of foreign language films broadcast on terrestrial television, 2004–2011



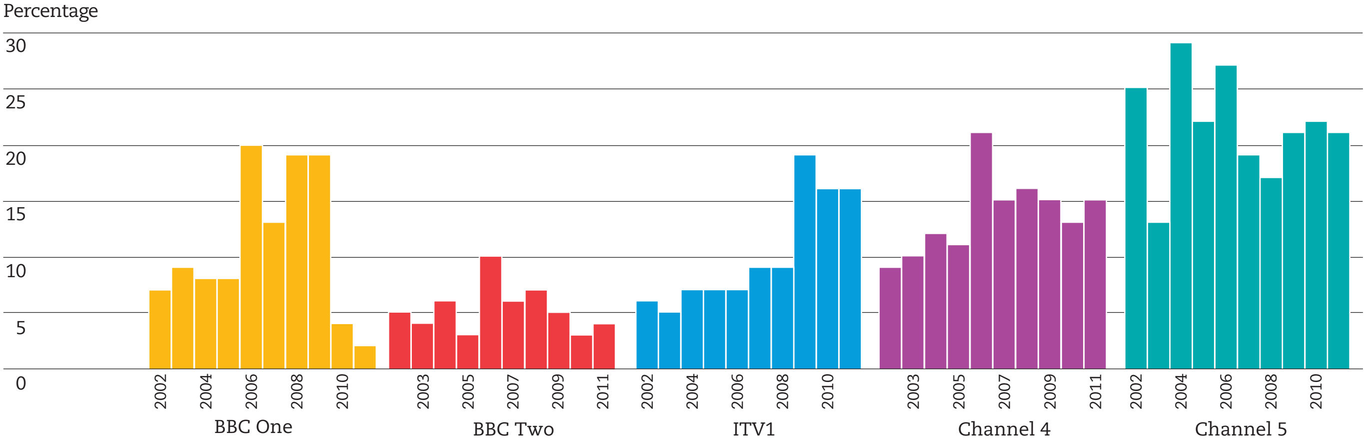
	2004	2005	2006	2007	2008	2009	2010	2011
BBC One	7	1	2	5	6	1	0	1
BBC Two	18	12	2	9	17	25	7	8
ITV1	0	2	0	0	1	3	2	0
Channel 4	32	43	35	46	46	42	50	51
Channel 5	3	3	2	3	3	5	0	0
Total	**60**	**61**	**41**	**63**	**73**	**76**	**59**	**60**

Source: Attentional, BFI RSU analysis.

13.2 Films on peak time terrestrial television, 2002–2011

The proportion of peak time hours (18:00 to 23:59 hours) dedicated to feature films varied widely across the terrestrial channels in the 10-year period 2002–2011 (Figure 13.2). Channel 5 and Channel 4 broadcast the most films in peak time hours over the decade. In 2011, over one fifth of Channel 5's peak time output was feature film, followed by 16% of ITV1 output and 15% of Channel 4's programming.

Figure 13.2 Film as a percentage of peak time programming hours by channel, 2002–2011



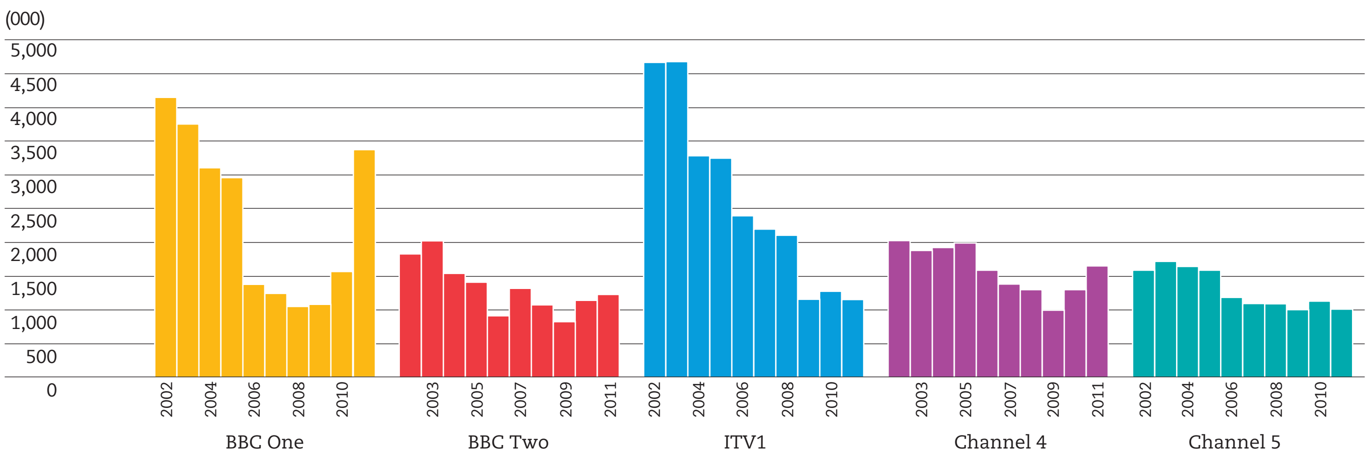
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
BBC One	7	9	8	8	20	13	19	19	4	2
BBC Two	5	4	6	3	10	6	7	5	3	4
ITV1	6	5	7	7	7	9	9	19	16	16
Channel 4	9	10	12	11	21	15	16	15	13	15
Channel 5	25	13	29	22	27	19	17	21	22	21

Source: Attentional.

13.3 Audiences for film on terrestrial television

The average audience for a film shown on peak time terrestrial television in 2011 was 3.4 million on BBC One (from 27 transmissions), 1.2 million on BBC Two and ITV1, 1.7 million on Channel 4 and 1 million on Channel 5. The peak time average audience for film declined between 2002 and 2009 on most of the terrestrial channels (Figure 13.3).

Figure 13.3 Average audience for peak time film, 2002–2011



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
BBC One	4,156	3,760	3,112	2,964	1,383	1,250	1,056	1,088	1,574	3,371
BBC Two	1,836	2,028	1,547	1,417	917	1,324	1,081	830	1,146	1,232
ITV1	4,671	4,684	3,290	3,253	2,400	2,201	2,112	1,161	1,283	1,157
Channel 4	2,031	1,886	1,931	1,997	1,595	1,388	1,306	1,001	1,306	1,655
Channel 5	1,594	1,722	1,650	1,593	1,190	1,099	1,094	1,009	1,135	1,017

Source: Attentional, BARB.

13.4 Top films on terrestrial television

The most popular film on terrestrial television in 2011 was *Indiana Jones and the Kingdom of the Crystal Skull*, with 7.9 million viewers tuning in to its premiere on BBC One (Table 13.3). In theatrical revenue terms, this is equivalent to a box office gross of £48 million (its actual gross in the UK was £40 million).

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 13.3 Top 10 films on terrestrial television, 2011

	Title	Channel	Country of origin	Year of theatrical release	TV audience (million)
1	Indiana Jones and the Kingdom of the Crystal Skull	BBC One	USA	2008	7.9
2	Pirates of the Caribbean: The Curse of the Black Pearl	BBC One	USA	2003	6.8
3	Harry Potter and the Goblet of Fire	ITV1	UK/USA	2005	6.5
4	Mamma Mia!	ITV1	UK/USA	2008	6.3
5	Harry Potter and the Order of the Phoenix	ITV1	UK/USA	2007	6.2
6	Ratatouille	BBC One	USA	2007	6.0
7	Quantum of Solace	ITV1	UK/USA	2008	5.6
8	Kung Fu Panda	BBC One	USA	2008	5.6
9	Madagascar: Escape 2 Africa	BBC One	USA	2008	5.3
10	Shrek the Third	BBC One	USA	2007	5.0

Source: Attentional, BARB.

The top 10 UK films of 2011 (Table 13.4) included seven transmissions of films from the Harry Potter series. The highest ratings were recorded for *Harry Potter and the Goblet of Fire* on ITV1.

Table 13.4 Top 10 UK originated films on terrestrial television, 2011

	Title	Channel	Country of origin	Year of theatrical release	TV audience (million)
1	Harry Potter and the Goblet of Fire	ITV1	UK/USA	2005	6.5
2	Mamma Mia!	ITV1	UK/USA	2008	6.3
3	Harry Potter and the Order of the Phoenix	ITV1	UK/USA	2007	6.2
4	Quantum of Solace	ITV1	UK/USA	2008	5.6
5	Harry Potter and the Prisoner of Azkaban	ITV1	UK/USA	2004	4.6
6	Harry Potter and the Chamber of Secrets	ITV1	UK/USA	2002	4.4
7	Harry Potter and the Philosopher's Stone	ITV1	UK/USA	2001	4.3
8	Harry Potter and the Prisoner of Azkaban	ITV1	UK/USA	2004	3.9
9	Harry Potter and the Order of the Phoenix	ITV1	UK/USA	2007	3.6
10	Mr Bean's Holiday	ITV1	UK/USA	2007	3.4

Source: Attentional, BARB.

Note: *Harry Potter and the Prisoner of Azkaban* was broadcast twice on ITV1 – on 1 January and 30 July. *Harry Potter and the Order of the Phoenix* was also broadcast twice – on 13 August and 17 December.

The highest audience figure for a UK independent film was for *The Duchess* with 3.4 million viewers on BBC Two, followed by *Glorious 39* and *The Bank Job* (Table 13.5).

Table 13.5 Top 10 independent UK films on terrestrial television, 2011

	Title	Channel	Country of origin	Year of theatrical release	TV audience (million)
1	The Duchess	BBC Two	UK/Fra/Ita	2008	3.4
2	Glorious 39	BBC Two	UK	2009	2.8
3	The Bank Job	Channel 4	UK/USA*	2008	2.8
4	Four Lions	Channel 4	UK	2010	2.7
5	The Queen	ITV1	UK/Fra/Ita	2006	2.6
6	The Young Victoria	BBC Two	UK/USA*	2009	2.6
7	How to Lose Friends & Alienate People	Channel 4	UK	2008	2.2
8	Dorian Gray	Channel 4	UK	2009	2.1
9	Nativity!	BBC Two	UK	2009	1.9
10	The Queen	ITV1	UK/Fra/Ita	2006	1.7

Source: Attentional, BARB.

Notes:
The Queen was broadcast twice on ITV1 – on 28 August and 31 December.
* *The Bank Job* and *The Young Victoria* were made with independent (non-studio) US support.

13.5 Films on multi-channel television

Multi-channel television (freeview/satellite/cable) accounted for almost 45% of all television viewing in 2011 and Table 13.6 lists the number of films shown, the average audience, the top film and audience for the top film, for a selection of digital channels which broadcast feature films. The ITV digital channels screened over 1,700 films in 2011, with an average audience of around 280,000 viewers. *Indiana Jones and the Kingdom of the Crystal Skull* recorded the largest audience for a single screening on multi-channel television, with over 1.5 million viewers on BBC Three.

Table 13.6 Feature films on selected digital channels, 2011

Channel	Number of film transmissions	Average film audience	Top film	Audience for top film
BBC Three	128	659,000	Indiana Jones and the Kingdom of the Crystal Skull	1,560,000
BBC Four	77	170,000	Monty Python's The Meaning of Life	1,030,000
E4	245	366,000	Home Alone 2: Lost in New York	996,000
Film4	2,836	202,000	Transporter 3	1,379,000
5*	263	215,000	Hancock	460,000
5 USA	415	187,000	Death Race	684,000
G.O.L.D.	105	147,000	Matilda	426,000
Horror Channel	880	13,000	An American Werewolf in London	113,000
ITV2–4	1,712	280,000	Casino Royale	1,243,000
More 4	422	123,000	Titanic	623,000
Movies 24	1,287	7,000	Deck the Halls	55,000
Movies 4 Men 1–2	2,435	6,000	Scorcher	55,000
Sky 1–2	210	112,000	Forrest Gump	517,000
Sunrise TV	1,159	6,000	Coolie	57,000
Syfy	378	41,000	The Medallion	187,000
True Movies 1–2	209	9,000	Submerged	45,000
Turner Classic Movies 1–2	4,208	12,000	Rio Lobo	140,000
Viva	79	64,000	Men in Black	292,000
Watch	171	135,000	Matilda	625,000

Source: Attentional, BARB.

The top film on free-to-air digital multi-channel (in terms of total audience across all transmissions) was *Hot Fuzz* on ITV2 with a total audience of 8.1 million from 12 transmissions (Table 13.7).

Table 13.7 Top 10 feature films on free-to-air digital multi-channel television, 2011

	Title	Channel	Number of transmissions	Country of origin	Year of theatrical release	Total audience
1	Hot Fuzz	ITV2	12	UK	2007	8,114,000
2	Independence Day	E4/Film4	8	USA	1996	5,821,000
3	Iron Man	E4/Film4	6	USA	2008	5,168,000
4	Dark Blue	5 USA	39	USA	2002	4,965,000
5	The Bourne Ultimatum	ITV2	8	UK/USA	2007	4,661,000
6	Back to the Future	ITV2	8	USA	1985	4,550,000
7	Knocked Up	ITV2	8	USA	2007	4,155,000
8	Catwoman	ITV2	10	USA	2004	4,105,000
9	Gladiator	ITV2/Sky 1/Sky 2	10	USA	2000	4,070,000
10	Shooter	E4/More 4	6	USA	2007	3,942,000

Source: Attentional, BARB.

Table 13.8 outlines the number of films shown, the average audience and the top film on the UK's pay TV film channels. The various Sky Movie channels broadcast a total of 1,316 films across 44,960 slots while Disney Cinemagic broadcast 72 titles across 1,522 slots with an average audience of 29,000. The highest rated broadcast of a film on UK pay TV was *Grown Ups*, with 494,000 viewers on Sky Movies Premiere.

Table 13.8 Feature films on pay TV film channels, 2011

Channel	Number of film transmissions	Average film audience	Top film	Audience for top film
Disney Cinemagic	1,522	29,000	Tangled	518,000
MGM HD	1,328	1,000	Navy Seals	21,000
Sky Movie channels	44,960	12,000	Grown Ups	494,000

Source: Attentional, BARB.

The top film in terms of combined viewings on the pay TV film channels in 2011 was *Shrek Forever After*, which attracted a total audience of almost 5 million viewers from 55 transmissions on the Sky Movie channels (Table 13.9).

Table 13.9 Top 10 feature films on pay TV film channels, 2011

	Title	Channel	Number of transmissions	Country of origin	Year of theatrical release	Total audience*
1	Shrek Forever After	Sky Movies	55	USA	2010	4,961,000
2	Alice in Wonderland	Sky Movies	178	USA	2010	4,810,000
3	Finding Nemo	Disney Cinemagic	94	USA	2003	4,766,000
4	How to Train Your Dragon	Sky Movies	68	USA	2010	4,619,000
5	Toy Story 3	Sky Movies	48	USA	2010	4,546,000
6	Sherlock Holmes	Sky Movies	122	UK/USA	2009	4,426,000
7	Clash of the Titans	Sky Movies	105	UK/USA	2010	4,245,000
8	Robin Hood	Sky Movies	130	UK/USA	2010	4,174,000
9	Prince of Persia: The Sands of Time	Sky Movies	123	UK/USA	2010	3,996,000
10	Percy Jackson and the Lightning Thief	Sky Movies	105	USA/Can	2010	3,947,000

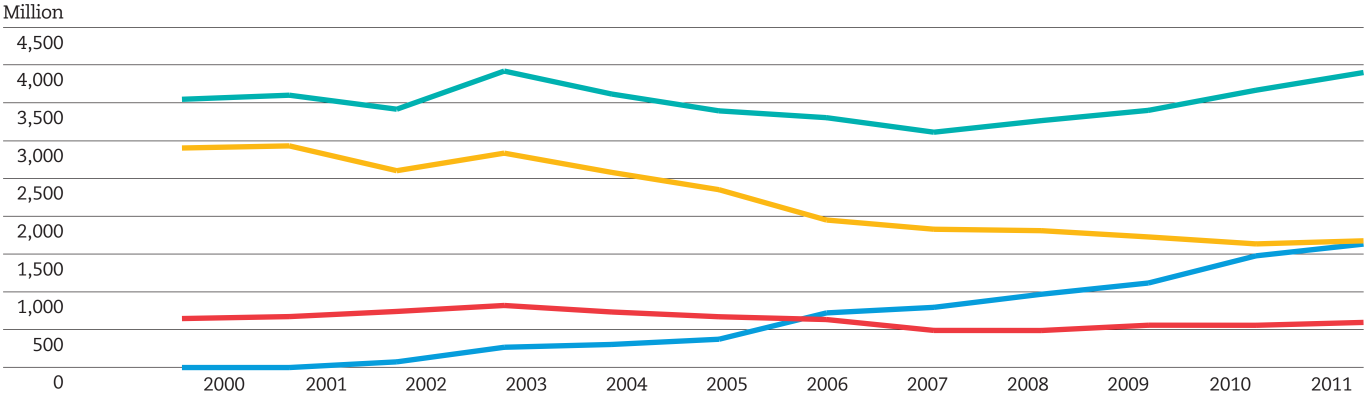
Source: Attentional, BARB.

* Audience figures refer to total audience for all transmissions of that film across all subscription film channels in 2011.

13.6 The audience for film on all television channels, 2000–2011

In 2011, there were 3.9 billion viewings of film on television, compared with cinema admissions of 172 million. This represents approximately 68 film viewings per person per year (Figure 13.4). Following six years of steady growth, the audience for digital multi-channel film screenings is now almost equal to the number of terrestrial television viewings.

Figure 13.4 Total audience for feature film on television (except pay-per-view), 2000–2011

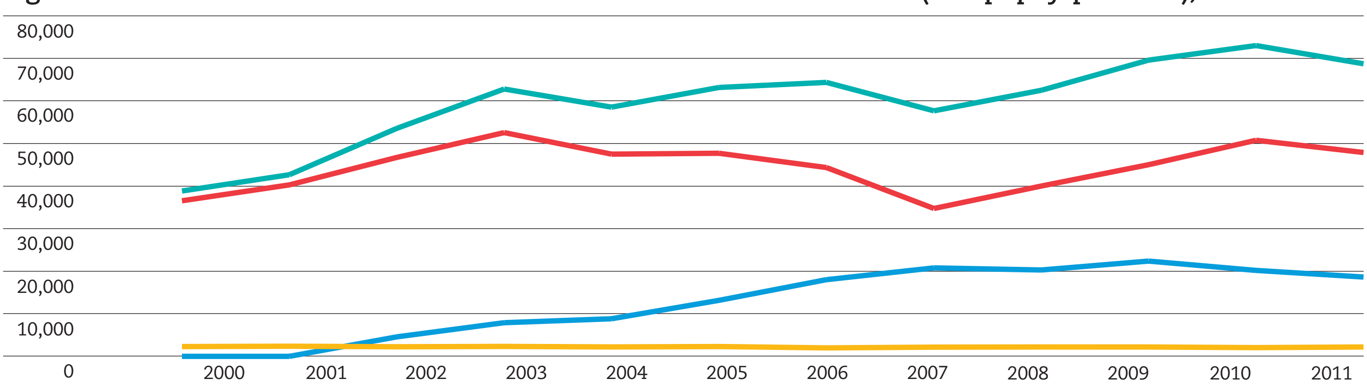


	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Terrestrial	2,901	2,929	2,601	2,833	2,579	2,350	1,949	1,827	1,808	1,725	1,633	1,674
Pay TV film channels	647	673	741	820	734	671	634	490	489	559	558	596
Other digital multi-channel	0	0	75	268	305	374	722	796	969	1,118	1,477	1,632
Total	3,548	3,602	3,417	3,921	3,618	3,395	3,305	3,113	3,266	3,402	3,668	3,902

Source: BFI RSU, Attentional, BARB.

Figure 13.5 shows the total number of films shown on television since 2000. The total number of screenings declined in 2011 following three years of growth led by the increase in transmissions on the pay TV channels. In terms of unique film titles, there were 2,013 films broadcast on terrestrial, 1,475 titles on the pay TV film channels and 3,527 on other digital channels. Overall, 5,570 individual film titles were shown across all television channels in 2011.

Figure 13.5 Total number of film transmissions on all television channels (except pay-per-view), 2000–2011



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Terrestrial	2,318	2,405	2,275	2,355	2,234	2,326	2,011	2,182	2,221	2,218	2,075	2,221
Pay TV film channels	36,547	40,277	46,720	52,552	47,499	47,698	44,346	34,737	40,014	45,015	50,756	47,889
Other digital multi-channel	0	0	4,573	7,900	8,821	13,144	17,998	20,765	20,274	22,359	20,174	18,622
Total	38,865	42,682	53,568	62,807	58,554	63,168	64,355	57,684	62,509	69,592	73,005	68,732

Source: BFI RSU, Attentional.

13.7 The value of feature film to broadcasters

Based on a model developed by Attentional, the BFI Research and Statistics Unit has estimated the value of feature film to UK broadcasters to be approximately £1.4 billion in 2011. This figure is derived from the annual revenue per channel – ie net advertising revenue for the commercial channels, subscription revenues for the pay TV channels and the proportion of licence fee applied to programming on the BBC channels – multiplied by the percentage of broadcast hours for feature film.

- For cinema admissions see Chapter 1 (page 8)
- For an overview of the film market as a whole see Chapter 14 (page 134)

Chapter 14:

The UK film market as a whole

The UK is the third largest film market in the world, generating revenues in excess of £4 billion. Theatrical and overall television income has grown in recent years but physical video remains the largest single revenue source.

Facts in focus:

- The total filmed entertainment market in the UK in 2011 is estimated to have been worth £4 billion, up 5% on 2010.
- In 2011, theatrical, multi-channel, pay TV and VoD revenues all recorded increases, but physical video and terrestrial television revenues declined.
- In 2011, sell-through video on physical media was still the largest single revenue source for film in the UK market, accounting for 29% of total revenues.
- Gross revenues for UK film were an estimated £997 million.
- In 2011, the UK had the third largest filmed entertainment market in the world after the USA and Japan.

14.1 The UK filmed entertainment market as a whole

As Table 14.1 shows, in 2011 physical video retail was the most significant component of the film value chain accounting for 29% of total revenues (£1.2 billion). Revenues from video retail were down 8% from 2010 when takings of £1.3 billion accounted for one third of total revenues. Theatrical revenues in 2011 increased by 5% to £1,040 million, compared with £988 million in 2010. Gross television revenues increased by 19% from £1,173 million to £1,398 million, due mostly to a rise in digital multi-channel income, although much of this accrued to the television industry rather than to the suppliers of film.

Gross revenues for UK films were estimated to be £997 million, with market share for UK films highest in the theatrical market (36%) and lowest in film on pay TV (17%).

Table 14.1 UK filmed entertainment market, 2010 and 2011

Window	Total gross value £ million 2010	Attributable to UK films £ million 2010	Total gross value £ million 2011	Attributable to UK films £ million 2011
Theatrical	988	237	1,040	374
Video rental (physical)	253	51	246	54
Video retail (physical)	1,267	253	1,165	256
Pay-TV	605	74	676	117
Terrestrial television	215	51	150	36
Other multi-channel television	353	74	572	123
nVoD and VoD	146	29	166	37
Total UK	**3,827**	**769**	**4,015**	**997**

Sources: Rentrak, BVA, Official Charts Company, Attentional, *Screen Digest*, BFI RSU analysis.

Notes:
'Theatrical' is the total gross UK theatrical revenues (including VAT) in the calendar years 2010 and 2011 for all films exhibited in the UK. See Chapter 1.
'Video rental (physical)' is the total revenue from physical video rental (DVD, Blu-ray, etc) transactions in the calendar years 2010 and 2011. 2010 figures revised since 2011 Yearbook, see Chapter 11.
'Video retail (physical)' is the total revenue from physical video retail transactions in the calendar years 2010 and 2011. See Chapter 11.
The television values are retail equivalent values calculated from the dataset of films shown on UK television. Values are estimated by multiplying the film share of the total channel time by the total revenue applicable to that channel (licence fee, subscription or advertising revenue). Television values cover terrestrial, pay TV and other digital multi-channel. See Chapter 12. An estimate for pay-per-view is included in nVoD.
Video on Demand and near-Video on Demand revenues are derived from *Screen Digest* estimates of the combined size of the television and internet-based markets. UK share is based on an estimate derived from knowledge of UK film share in the pay TV and video markets.
The above values are gross values and include distributor and exhibitor margins, VAT, prints and advertising costs, DVD/video retail margins, broadcaster and multi-channel television operator margins in addition to net returns to the film production sector and film investors.
The revenues shown here are revenues earned by film in the UK market, whether UK or foreign films. The table does not include export revenues for the UK film industry. See Chapter 21 for UK film export revenues.

14.2 The UK market in the global context

In 2011, the UK had the third largest filmed entertainment market in the world, after the USA and Japan (Table 14.2). The USA accounted for 35% of the world market, Japan accounted for 10% and the UK for 7%. The next biggest individual territories were France, Australia, Canada, Germany and China.

Table 14.2 Filmed entertainment revenues by country/region, US$ million, 2011

Country/region	Revenue in $US million	% of total
USA	29,953	35.1
Japan	8,175	9.6
UK	6,022	7.0
Other Western Europe	5,475	6.4
France	4,407	5.2
Australia	4,039	4.7
Canada	3,897	4.6
Germany	3,794	4.4
Other Asia Pacific	3,606	4.2
China	2,719	3.2
Italy	1,917	2.2
South Korea	1,794	2.1
India	1,658	1.9
Brazil	1,648	1.9
Russia	1,594	1.9
Mexico	1,186	1.4
Spain	1,145	1.3
Other Central and Eastern Europe	957	1.1
Other Latin America	763	0.9
Middle East and Africa	684	0.8
Total	**85,433**	**100.0**

Source: PricewaterhouseCoopers, *Global entertainment and media outlook 2012–2016*, June 2012.

Notes:
'Filmed entertainment revenue' includes box office receipts, home DVD/video (rental and retail) and online download and streaming revenues. It does not include television revenues.
Percentages may not sum to 100 due to rounding.

According to PricewaterhouseCoopers, the ranking of filmed entertainment by territory is forecast to change significantly by 2016 (Table 14.3), with China becoming the third largest individual territory, ahead of the UK, France and Australia. India's share of the global filmed entertainment market is forecast to increase to 2.7% and Brazil's to 2.3%.

Table 14.3 Filmed entertainment revenues by country/region, US$ million, forecast for 2016

Country/region	Revenue in $US million	% of total
USA	30,933	31.0
Japan	8,667	8.7
China	7,374	7.4
UK	6,199	6.2
Other Western Europe	5,777	5.8
France	5,445	5.5
Australia	4,509	4.5
Germany	4,479	4.5
Canada	4,412	4.4
Other Asia Pacific	4,401	4.4
India	2,688	2.7
Brazil	2,274	2.3
Russia	2,264	2.3
South Korea	2,231	2.2
Italy	2,098	2.1
Mexico	1,530	1.5
Spain	1,272	1.3
Other Central and Eastern Europe	1,186	1.2
Other Latin America	1,095	1.1
Middle East and Africa	823	0.8
Total	**99,657**	**100.0**

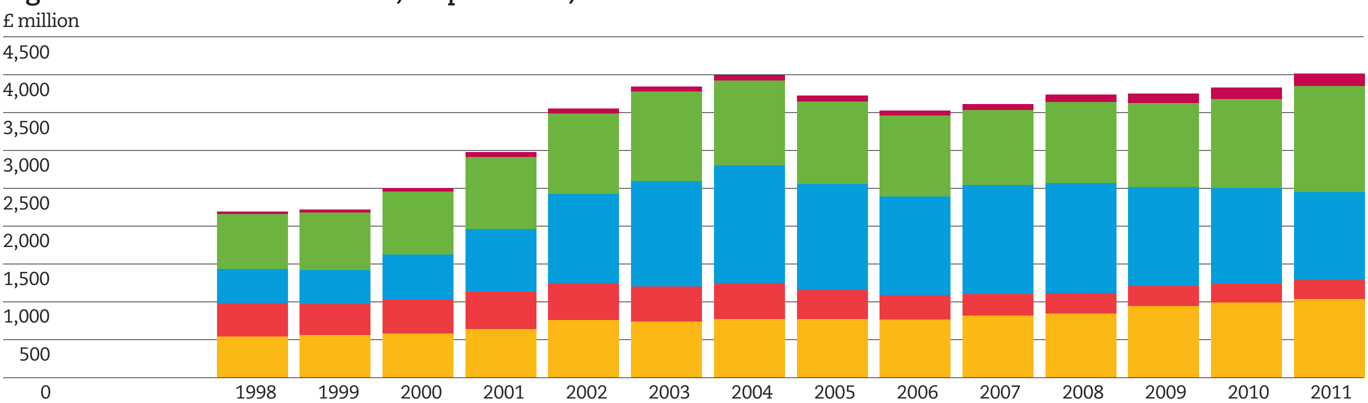
Source: PricewaterhouseCoopers, *Global Entertainment and Media Outlook 2012–2016*, June 2012.

Notes:
'Filmed entertainment revenue' includes box office receipts, physical video (rental and retail) and online download and streaming revenues. It does not include television revenues.
Forecasts are in nominal US dollars at the average 2011 exchange rate and therefore do not estimate the impact of any changes in exchange rates between 2011 and 2016.
Percentages may not sum to 100 due to rounding.

14.3 The evolution of UK film revenues, 1998–2011

Aggregate film revenues increased rapidly from 1999 to 2004 with the emergence of the DVD format before falling in 2005 and 2006 (Figure 14.1). Growth resumed in 2007, with increased theatrical and television revenues compensating for a decline in the value of the physical rental and retail markets. Combined revenues from television-based and online on-demand services remain a small component of the overall film value chain.

Figure 14.1 Gross film revenues, all platforms, 1998–2011



	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Theatrical	547	563	583	645	755	742	770	770	762	821	850	944	988	1,040
Rental video (physical)	437	408	444	494	494	462	476	389	327	280	265	263	253	246
Retail video (physical)	453	451	601	821	1,175	1,392	1,557	1,399	1,302	1,440	1,454	1,311	1,267	1,165
Film on television	726	755	826	954	1,066	1,182	1,119	1,089	1,066	994	1,067	1,108	1,173	1,398
Film on VoD and nVoD	33	40	50	65	63	68	73	74	67	75	102	123	146	166
Total	**2,196**	**2,217**	**2,504**	**2,979**	**3,553**	**3,846**	**3,995**	**3,721**	**3,524**	**3,610**	**3,738**	**3,749**	**3,827**	**4,015**

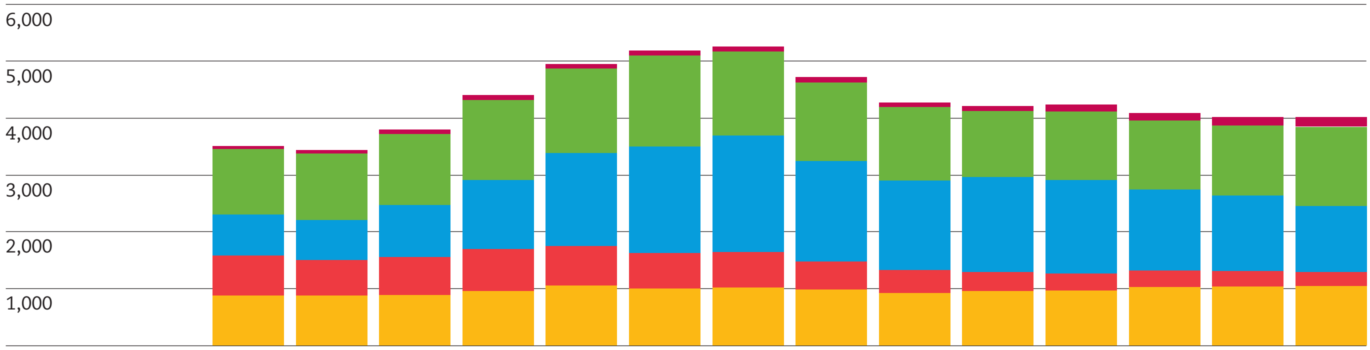
Source: Rentrak, BVA, Official Charts Company, Attentional, *Screen Digest*, BFI RSU analysis.

Note: 'Film on television' covers terrestrial, pay TV and other digital multi-channel. Television-based nVoD and VoD are included within the VoD total.

The revenues shown in Figure 14.1 are the actual figures. However, if adjusted for inflation using the recreational and cultural services price index (Figure 14.2), the decline in revenues from 2004 is clear, with the 2011 market down 23% from the peak.

Figure 14.2 Gross inflation-adjusted film revenues, all platforms, 1998–2011 (expressed in 2011 pounds)

2011 £ million



	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Theatrical	874	872	883	955	1,053	1,001	1,014	977	924	958	962	1,029	1,037	1,040
Rental video (physical)	698	632	672	731	689	623	627	494	397	327	300	287	266	246
Retail video (physical)	724	699	911	1,216	1,639	1,877	2,050	1,775	1,579	1,680	1,646	1,429	1,330	1,165
Film on television	1,160	1,170	1,251	1,413	1,487	1,594	1,473	1,382	1,293	1,159	1,208	1,208	1,231	1,398
Film on VoD and nVoD	53	62	76	96	88	92	96	94	81	87	115	134	153	166
Total	**3,510**	**3,436**	**3,792**	**4,411**	**4,955**	**5,186**	**5,259**	**4,722**	**4,275**	**4,211**	**4,232**	**4,087**	**4,017**	**4,015**

Source: Rentrak, BVA, Official Charts Company, Attentional, ONS, *Screen Digest*, BFI RSU analysis.

Notes:
Actual revenues deflated by the UK recreational and cultural services price index.
'Film on television' covers terrestrial, pay TV and other digital multi-channel. Television-based nVoD and VoD are included in the VoD total.

▸ For more information on the box office see Chapter 1 (page 8)
▸ For more information on physical video see Chapter 11 (page 111)
▸ For further details about the Video on Demand market see Chapter 12 (page 120)
▸ For more information on film on television see Chapter 13 (page 124)
▸ For information on the export revenues of the UK film industry see Chapter 21 (page 189)

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 15:

Audiences

The appetite for watching films in the UK continues to grow. Films were viewed by British audiences on over five billion occasions in 2011, with British films attracting over one billion viewings. Television remained the most popular platform for watching films.

Facts in focus:

- Total ‘film viewing occasions’ numbered 5.1 billion, which means an average of 87 film viewings per person in 2011.
- 77% of film viewing occasions were via television.
- Estimated total viewings of UK films numbered 1.1 billion occasions.
- The proportion of over-45s in the cinema audience increased to 28%.
- UK films appealed across all age groups with 67% of the audience for *The Inbetweeners Movie* drawn from the 16–24 category and 45% of *The King’s Speech* audience made up of the over-55s.

15.1 Total size of the UK film audience

The total size of the film audience in the UK in 2011 was estimated to be 5.1 billion, calculated from all the sources available (Table 15.1). Television accounted for 77% of the total film audience, followed by video (14%), downloading and streaming via all sources (5.5%) and cinema (4%).

Taking the total film viewing figure of 5.1 billion occasions and dividing it by an estimated viewing population (excluding the very young), there were 87 film viewing occasions per person in 2011, an average of just over seven films per month.

Figure 15.1 Estimated proportion of annual film viewing in the UK, 2011

	%
Film on television	77.0
DVD/Blu-ray	14.2
Downloaded/streamed	5.5
Cinema	3.4

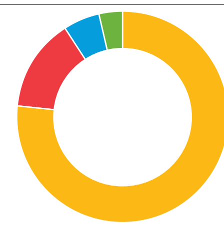


Table 15.1 Estimated total audience for film in the UK, all modes, 2011

Mode	Audience size (million)	% of total film audience	Estimated audience for UK film (million)
Cinema	172	3.4	62
DVD/Blu-ray	719	14.2	158
Downloaded/streamed	277	5.5	61
Film on television	3,902	77.0	817
Total	**5,070**	**100.0**	**1,098**

Sources: Attentional, BFI, CAA, Rentrak, *Screen Digest*, RSU analysis.

Notes:
'DVD/Blu-ray' includes occasions watching previously purchased feature film DVD/Blu-ray as well as current purchases. The DVD/Blu-ray and downloaded/streamed estimates are derived from the BFI *Opening our eyes* survey conducted in 2011.
'Film on television' includes terrestrial, pay TV and free-to-air multi-channel.
Percentages may not sum to 100 due to rounding.

15.2 The UK cinema audience

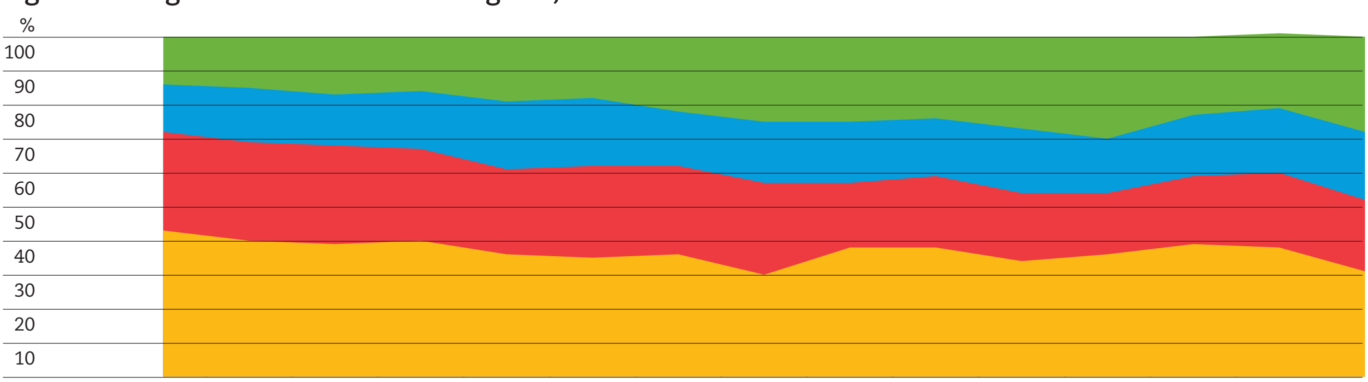
Opening our eyes[1], the recent report on the UK public's views on the cultural contribution of film, revealed that there was strong support for British film and filmmaking amongst the British public with comparatively minor variations across age, gender and ethnicity. In this chapter we look at British cinema-goers' film preferences by age, gender and social group in 2011.

As shown in Chapter 2, the top four films at the UK box office in 2011 were British films and two of these were independent UK films. It is interesting to note how many of the films with above average appeal to individual age groups are UK films (Tables 15.2 – 15.7).

15.3 Cinema audience by age

Figure 15.2 shows the age trends of cinema-goers from 1997 to 2011. The proportion of people aged 45 or above going to the cinema increased gradually at the expense of younger cinema-goers from 1997 to 2008 and increased again in 2011 following two years of decline. This was due to the number of box office successes with particular appeal to this older category of cinema-goer, such as *The King's Speech*, *Tinker*, *Tailor*, *Soldier*, *Spy* and *Jane Eyre*.

Figure 15.2 Age distribution of cinema-goers, 1997–2011



	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
15–24	43	40	39	40	36	35	36	30	38	38	34	36	39	38	31
25–34	29	29	29	27	25	27	26	27	19	21	20	18	20	22	21
35–44	14	16	15	17	20	20	16	18	18	17	19	16	18	19	20
45+	14	15	17	16	19	18	22	25	25	24	27	30	23	22	28

Source: National Readership Survey (NRS), Cinema Advertising Association.

Note: Cinema-goers are defined as those who reported to have 'ever gone' to the cinema in the surveys. Figures for any given year may have included audiences for a small number of titles released in the latter part of the previous year.

1 *Opening our eyes: How film contributes to the culture of the UK*, a report for the BFI by Northern Alliance and Ipsos MediaCT, 2011.

15.4 Film preferences by age

Animations and family films such as *Arthur Christmas*, *Gnomeo & Juliet*, *Horrid Henry: The Movie*, *The Smurfs* and *Tangled* were of particular appeal to the 7–14 audience (Table 15.2). Comedies *The Hangover Part II*, *The Inbetweeners Movie* and *Paul* and action films such as *Fast & Furious 5* appealed to the 15–24 age group (Table 15.3). *Captain America: The First Avenger* and *Senna* were of particular appeal to the 25–34 audience (Table 15.4). Parents and carers in the 35–44 audience meant that shares for *Arthur Christmas*, *Kung Fu Panda 2* and *Tangled* were higher than average (Table 15.5). *The King's Speech*, *Sherlock Holmes: A Game of Shadows* and *Tinker, Tailor, Soldier, Spy* attracted a greater proportion of cinema-goers in the 45–54 age group (Table 15.6). As in previous years, UK films appealed strongly to the over-55 audience (Table 15.7) with *Jane Eyre*, *The King's Speech* and *Tinker, Tailor, Soldier, Spy* all featuring in the list.

Table 15.2 Films with an above-average audience in the 7–14 age group, 2011 top 20 films and top UK films

Title	Age group % of the film's total audience
Horrid Henry: The Movie (UK)	42
The Smurfs	42
Gnomeo & Juliet (UK)	41
Arthur Christmas (UK)	39
Tangled	31
The Adventures of Tintin: The Secret of the Unicorn	31
Kung Fu Panda 2	29
Johnny English Reborn (UK)	22
7–14 age group in top 20 and top UK audience (%)	13
7–14 age group in total survey population (%)	13

Source: CAA Film Monitor.

Notes:
* Audience data were only available for 18 of the top 20 UK films released in 2011.
'Audience' in this table and throughout this chapter refers to film-going occasions. That is, if a person went to the cinema to see 10 films in 2011, that person would have contributed 10 film-going occasions to the audience figures above, unless otherwise stated. Repeat visits to the same films are not recorded in CAA Film Monitor.
CAA Film Monitor included 92 film titles (mostly mainstream) of the 558 theatrical releases in 2011. The Film Monitor survey is carried out via a fortnightly omnibus survey of over 1,000 adults and children aged 7+.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 15.3 Films with an above-average audience in the 15–24 age group, 2011 top 20 films and top UK films

Title	Age group % of the film's total audience
The Inbetweeners Movie (UK)	67
The Hangover Part II	54
Paul (UK)	53
Fast & Furious 5	53
The Twilight Saga: Breaking Dawn – Part 1	51
127 Hours (UK)	46
X-Men: First Class (UK)	46
One Day (UK)	45
Bridesmaids	43
Black Swan	43
15–24 age group in top 20 and top UK audience (%)	33
15–24 age group in total survey population (%)	31

Source: CAA Film Monitor.

Table 15.4 Films with an above-average audience in the 25–34 age group, 2011 top 20 films and top UK films

Title	Age group % of the film's total audience
Captain America: The First Avenger (UK)	33
Senna (UK)	30
Transformers: Dark of the Moon	28
25–34 age group in top 20 and top UK audience (%)	19
25–34 age group in total survey population (%)	21

Source: CAA Film Monitor.

Table 15.5 Films with an above-average audience in the 35–44 age group, 2011 top 20 films and top UK films

Title	Age group % of the film's total audience
Tangled	25
Kung Fu Panda 2	23
Arthur Christmas (UK)	22
Gnomeo & Juliet (UK)	21
127 Hours (UK)	20
35–44 age group in top 20 and top UK audience (%)	14
35–44 age group in total survey population (%)	16

Source: CAA Film Monitor.

Table 15.6 Films with an above-average audience in the 45–54 age group, 2011 top 20 films and top UK films

Title	Age group % of the film's total audience
Sherlock Holmes: A Game of Shadows (UK)	17
Tinker, Tailor, Soldier, Spy (UK)	14
The King's Speech (UK)	14
45–54 age group in top 20 and top UK audience (%)	9
45–54 age group in total survey population (%)	9

Source: CAA Film Monitor.

Table 15.7 Films with an above-average audience in the 55+ age group, 2011 top 20 films and top UK films

Title	Age group % of the film's total audience
Jane Eyre (UK)	54
The King's Speech (UK)	45
Tinker, Tailor, Soldier, Spy (UK)	40
55+ age group in top 20 and top UK audience (%)	11
55+ age group in total survey population (%)	11

Source: CAA Film Monitor.

15.5 Film preferences by gender

Some films attracted substantially more of one gender than the other (Table 15.8). Men preferred action (*Captain America: The First Avenger*, *Mission: Impossible – Ghost Protocol* and *Transformers: Dark of the Moon*). *Bridesmaids*, *Jane Eyre*, *One Day* and *Twilight Saga: Breaking Dawn – Part 1* featured in the list of films with greater female audience share.

Table 15.8 Audience gender split of top performing films released in the UK and Republic of Ireland, 2011 top 20 films and top UK films

Greater female audience share	Male %	Female %
Jane Eyre (UK)	14	86
One Day (UK)	19	81
Bridesmaids	21	79
The Twilight Saga: Breaking Dawn – Part 1	30	70
Arthur Christmas (UK)	32	68
Horrid Henry: The Movie (UK)	34	66
The Smurfs	38	62
Black Swan	39	61

Greater male audience share	Male %	Female %
Captain America: The First Avenger (UK)	78	22
Senna (UK)	73	27
Transformers: Dark of the Moon	73	27
Mission: Impossible – Ghost Protocol	73	27
127 Hours (UK)	68	32
Fast & Furious 5	66	37
The Three Musketeers (UK)	65	35
X-Men: First Class (UK)	63	37

Gender difference not significant	Male %	Female %
Pirates of the Caribbean: On Stranger Tides (UK)	52	48
Tinker, Tailor, Soldier, Spy (UK)	52	48
Harry Potter and the Deathly Hallows: Part 2 (UK)	48	52

Source: CAA Film Monitor.

15.6 Film preferences by social group

Eight films, including *Jayne Eyre*, *The King's Speech*, *One Day*, *Senna* and *Tinker*, *Tailor*, *Soldier*, *Spy* had a particularly strong appeal to the AB audience in 2011 (Table 15.9) while two films – *Fast & Furious* 5 and *Johnny English Reborn* – had a significant appeal to the DE audience (Table 15.10).

Table 15.9 Films with above-average AB audience share, 2011 top 20 films and top UK films

Title	AB group % of film's total audience
One Day (UK)	50
Tinker, Tailor, Soldier, Spy (UK)	47
The King's Speech (UK)	47
Senna (UK)	47
Jane Eyre (UK)	43
Harry Potter and the Deathly Hallows: Part 2 (UK)	35
Black Swan	35
Gnomeo & Juliet (UK)	34
AB share of top 20 and top UK audience (%)	31
AB in total survey population (%)	30

Source: CAA Film Monitor.

Table 15.10 Films with above-average DE audience share, 2011 top 20 films and top UK films

Title	DE group % of film's total audience
Johnny English Reborn (UK)	28
Fast & Furious 5	28
DE share of top 20 and top UK audience (%)	17
DE in total survey population (%)	19

Source: CAA Film Monitor.

- For more information about top films at the box office in 2011 see Chapter 2 (page 18)
- For further details about film on video see Chapter 11 (page 111)
- For more information on audiences for films on demand and on mobile devices see Chapter 12 (page 120)
- For further information about film on television see Chapter 13 (page 124)

Image: ***Wuthering Heights*** *courtesy of Artificial Eye*

Chapter 16:

Films certified as British 1998–2011

In 2011, 203 films were certified as British, the highest number since our records began. The total production value of these films also hit a record high at £2,250 million, £1,533 million of which was attributed to UK spend.

Facts in focus:

- A total of 203 UK films (189 in 2010) received final certification as British films in 2011. Of these, 189 were films which passed the Cultural Test and 14 were official co-productions.
- The total production budget of finally certified Cultural Test films was £2,119 million in 2011 (£1,002 million in 2010) and the combined production budget of finally certified co-productions was £131.4 million (£137.4 million in 2010).
- There were 151 interim Cultural Test approvals in 2011, with a predicted production value of £1,615 million and 19 interim co-production approvals with an anticipated production value of £68 million.
- In 2011, the median budget of Cultural Test films was £0.5 million while that of co-productions was £3.8 million.

16.1 Qualifying as an official British film

To access UK film tax relief or be eligible for Lottery funding, a film must be certified as British. To qualify as British, a film must either pass the Cultural Test under Schedule 1 of the Films Act 1985 or be certified as an official co-production under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production.

The Secretary of State for Culture, Olympics, Media and Sport is responsible for approving the issuing of British Film Certificates on the basis of recommendations made by the BFI Certification Unit. At the start of 2011 this Unit was part of the UK Film Council, but became part of the BFI in April 2011 when the BFI assumed responsibility for the majority of the UK Film Council's core functions. An 'interim approval' is granted prior to the start of principal photography to those films that meet the criteria, and 'final certification' is awarded once the film has been completed and final documents submitted. (There is more information about public investment in film in Chapter 18.)

To qualify as a British film under the Schedule 1 Cultural Test, films have to achieve a requisite number of points based on the UK elements in the story, setting and characters and for where and by whom the film was made (see the links at the end of the chapter for details of the Cultural Test). A wide variety of films qualified as British under the Cultural Test in 2011, from *The Chronicles of Narnia: The Voyage of the Dawn Treader, The Eagle* and *Jane Eyre* to *We Need to Talk About Kevin* and *Wuthering Heights*.

Films can also qualify as British under one of the various official UK co-production agreements. Official co-productions must be certified by the competent authorities in each co-producing country as meeting the certifying criteria, which include the creative, artistic, technical and financial input from each co-producer. Once certified, a film counts as a national film in each of the territories and may qualify for public support on the same basis as national films in that territory. British films certified as official co-productions are not required to pass the Cultural Test. Films which received final co-production certification in 2011 include *Africa United, The Imaginarium of Dr Parnassus* and *Route Irish*.

At the end of 2011, the UK had eight active bilateral treaties in place, with Australia, Canada, France, India, Israel, Jamaica, New Zealand and South Africa. At that time the UK had also signed treaties with Morocco and Palestine which were subject to constitutional procedures and ratification before they could come into force. (The UK-Palestine treaty was ratified in April 2012.) Official UK co-productions can also be certified under the European Convention on Cinematographic Co-production of which the UK is one of 42 signatories.

16.2 Cultural Test certifications, 2010 and 2011

In 2011, a total of 189 films (170 in 2010) received final certification as British under the Cultural Test (Table 16.1). The total budget of finally certified films increased from £1,002 million in 2010 to £2,119 million in 2011. This increase reflects the higher number of big budget inward investment films made in 2010 feeding through to a higher value of final certifications in 2011. The number of interim Cultural Test approvals also increased in 2011, albeit slightly, compared with 2010 (142 in 2010 and 151 in 2011), but the combined production value increased from £959 million in 2010 to £1,615 million in 2011. As with final certifications the increase in the aggregate production budget is due to a greater number of high value inward investment productions receiving interim certification in 2011.

Table 16.1 Cultural Test certifications, 2010 and 2011

	2010		2011	
Type of certification	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	142	959.3	151	1,614.8
Final certification	170	1,001.7	189	2,118.9

Source: DCMS, BFI.

16.3 Co-production certifications, 2010 and 2011

In 2011, with 14 final certifications (£131 million) and 19 interim approvals (£68 million), the number of official co-productions was slightly lower than in 2010.

In 2011, eight of the 14 final co-production certifications were under the European Convention on Cinematic Co-production, three were under the UK-Canada agreement and one each were under the UK-Australia, the UK-New Zealand and the UK-South Africa agreements.

Of the 19 interim co-production certifications, 15 were under the European Convention, three were under the UK-Canada agreement and one was under the UK-South Africa agreement.

Table 16.2 Co-production certifications, 2010 and 2011

	2010		2011	
Type of certification	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	23	187.8	19	68.1
Final certification	19	137.4	14	131.4

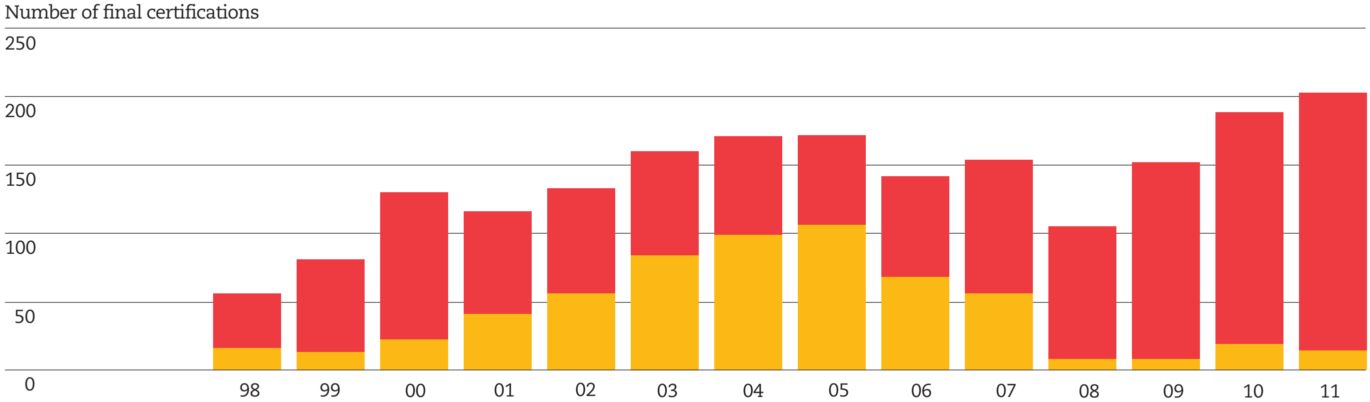
Source: DCMS, BFI.

16.4 Finally certified British films, 1998–2011

Thanks in part to a competitive tax regime, the number of UK films (Cultural Test and co-productions) receiving final certification has risen sharply in the past few years. The high figures of 2010 (189) and 2011 (203) contrast sharply with the low totals of 1998 (56) and 1999 (81). As Figure 16.1 shows, in the first half of the 2000s the number of Cultural Test films remained fairly constant while co-productions increased to become the dominant financing model for production. The decline in co-production numbers since then has been influenced by the closing of tax loopholes and the redesign of the post-2006 tax relief to accrue more benefit to the UK economy (see below).

Figure 16.1 Number of finally certified (Cultural Test and co-production) UK films, calendar years 1998–2011

Number of final certifications



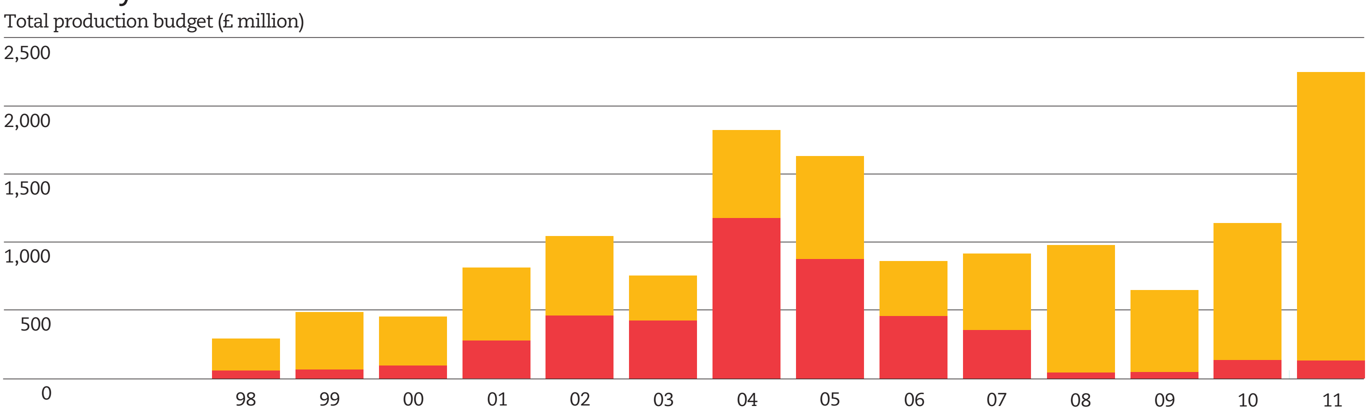
	98	99	00	01	02	03	04	05	06	07	08	09	10	11
Cultural Test	40	68	108	75	77	76	72	66	74	98	97	144	170	189
Co-production	16	13	22	41	56	84	99	106	68	56	8	8	19	14
Total	**56**	**81**	**130**	**116**	**133**	**160**	**171**	**172**	**142**	**154**	**105**	**152**	**189**	**203**

Source: DCMS, BFI.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

The total production budget of finally certified British films in 2011 was the highest on record at £2,250 million (Figure 16.2). The previous highest was £1,822 million in 2004, which was mainly due to the surge in official UK co-productions in the early 2000s. In 2004/05 a series of cooling measures designed to restore balance in co-production relations were introduced by the DCMS and Her Majesty's Revenue and Customs (HMRC) and in 2007 the basis of tax relief was shifted from total budget to UK spend. This intervention reduced the incentive to structure films as co-productions as these films generally have lower levels of UK spend than Cultural Test films. The value of official co-productions in 2008 and 2009 fell back to the pre-2000s level, but increased slightly in 2010 and 2011. The record level of aggregate budget in 2011 is mainly due to a high number of high budget inward investment films receiving final Cultural Test certification during the year.

Figure 16.2 Total production budget of finally certified (Cultural Test and co-production) UK films, calendar years 1998–2011



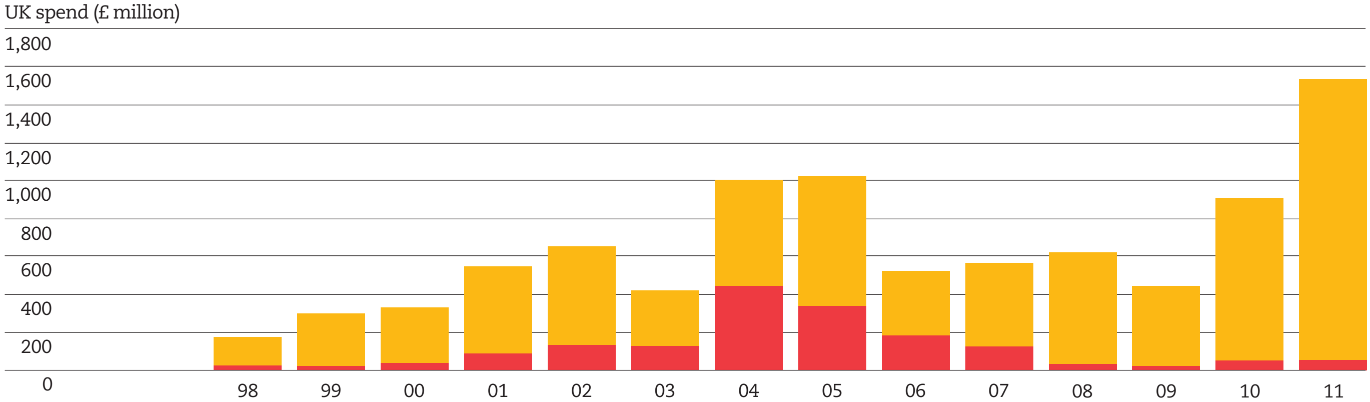
	98	99	00	01	02	03	04	05	06	07	08	09	10	11
Cultural Test	232.1	407.8	361.2	538.5	585.4	330.0	643.5	757.7	402.0	561.4	935.4	603.9	1,001.7	2,118.9
Co-production	59.5	66.3	95.5	277.7	462.2	427.6	1,178.2	877.1	459.5	356.7	45.2	48.0	137.4	131.4
Total	**291.6**	**474.1**	**456.7**	**816.1**	**1,047.5**	**757.6**	**1,821.7**	**1,634.8**	**861.6**	**918.1**	**980.6**	**651.8**	**1,139.1**	**2,250.3**

Source: DCMS, BFI.

Notes: Total production budget is the sum of production activity in the UK and production activity outside the UK for Cultural Test films and total investment for co-productions.
Figures may not sum to totals due to rounding.

Figure 16.3 shows the levels of UK spend over the same period. UK spend is generally that part of the production budget spent in the UK (see notes to Figure 16.3). As with aggregate budgets, 2011 saw a record level of UK spend (£1,533 million), due mainly to the high budget inward investment films certified during the year. The previous peak of UK spend was £1,023 million in 2005, but by 2009 it had dropped to £445 million before increasing to £905 million in 2010. Although over half the total production budget was contributed by co-productions at their peak in 2004–2005, the UK spend of co-productions was considerably less than that of the Cultural Test films. Since then, the contribution of co-productions to the total UK spend has continued to fall. In 2011, Cultural Test films accounted for 96% of the UK spend of finally certified films.

Figure 16.3 UK spend of finally certified (Cultural Test and co-production) UK films, calendar years 1998–2011



	98	99	00	01	02	03	04	05	06	07	08	09	10	11
Cultural Test	151.4	269.3	292.4	459.3	522.5	293.3	560.2	685.4	341.1	442.4	588.5	422.9	853.8	1,478.5
Co-production	22.9	21.6	37.8	88.2	132.2	127.3	442.7	337.4	183.1	123.1	34.0	21.6	51.3	55.0
Total	**174.4**	**290.9**	**330.3**	**547.5**	**654.7**	**420.6**	**1,002.9**	**1,022.8**	**524.2**	**565.5**	**622.5**	**444.6**	**905.1**	**1,533.5**

Source: DCMS, BFI.

Notes:
'UK spend' is the 'value of the production activities in the UK' for Cultural Test films and 'UK expenditure' for co-productions (bilateral and European Convention). UK spend for co-productions may include some expenditure on UK goods and services which took place outside the UK.
Figures may not sum to totals due to rounding.

UK spend as a percentage of total budget is typically lower for co-productions than for Cultural Test films (Table 16.3). The co-production UK spend share is usually around one third, though it did rise in 2008 and 2009 as the number of co-productions fell away. The UK spend share was as high as 75% in 2008 and 45% in 2009, but in 2010 fell to the more 'typical' level of 37%, before increasing slightly to 42% in 2011. The annual average UK spend share of Cultural Test films has ranged from 63% to 91% and in 2011 was 70%. Tax relief for British films is based on UK spend up to a maximum of 80% of the qualifying budget.

Table 16.3 UK spend as % of total production budget, 1998–2011

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Cultural Test	65.2	66.0	81.0	85.3	89.3	88.9	87.1	90.5	84.8	78.8	62.9	70.0	85.2	69.8
Co-production	38.5	32.5	39.6	31.8	28.6	29.8	37.6	38.5	39.8	34.5	75.2	45.0	37.3	41.9
Total	**59.8**	**61.3**	**72.3**	**67.1**	**62.5**	**55.5**	**55.1**	**62.6**	**60.8**	**61.6**	**63.5**	**68.2**	**79.5**	**68.1**

Source: BFI.

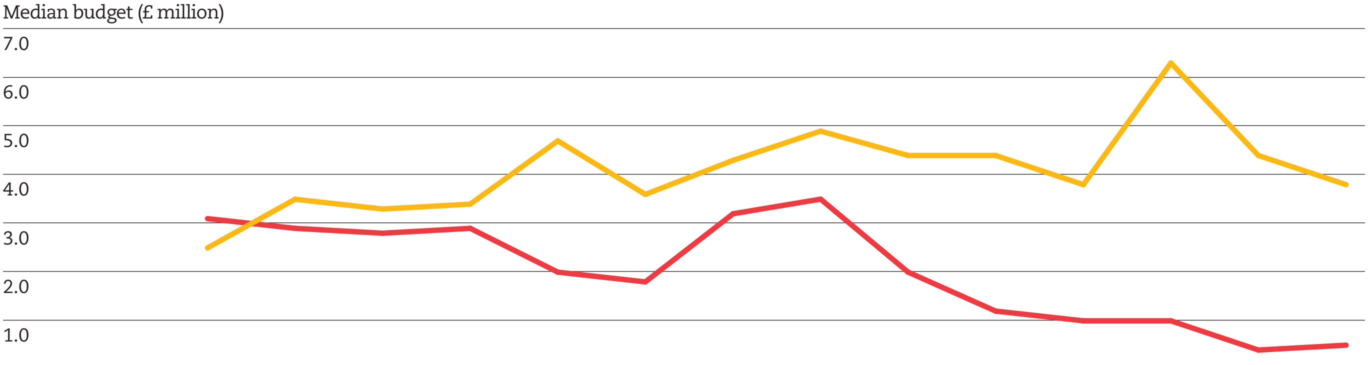
16.5 Median budgets, 1998–2011

Median budgets for final certifications are shown in Figure 16.4. From 1998 to 2005 the median budget for co-productions was on a rising trend, increasing to £4.9 million. This was followed by a drop in 2006–2008 to £3.8 million then a steep rise in 2009 to £6.3 million followed by falls in 2010 and 2011 to £4.4 million and £3.8 million respectively. The sharp rise in the median budget for 2009 is likely to be at least partly due to the very low numbers of films certified in that year, as with low numbers the median is more susceptible to the effects of individual budgets.

From 1998 to 2001, the median budget of Cultural Test films was around £3 million. This dipped in 2002 and 2003 to around £2 million, but then rose to over £3 million in 2004 and 2005. Since then, as the number of Cultural Test films has increased, the median budget has fallen to £1 million in 2008 and 2009 and to just £0.4 million and £0.5 million in 2010 and 2011 respectively.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 16.4 Median budgets of final certifications, 1998–2011



	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Cultural Test	3.1	2.8	2.8	2.9	2.0	1.8	3.2	3.5	2.0	1.2	1.0	1.0	0.4	0.5
Co-production	2.5	3.5	3.3	3.4	4.7	3.6	4.3	4.9	4.4	4.4	3.8	6.3	4.4	3.8

Source: BFI.

Note: The median is the middle value, ie there are equal numbers of films above and below the median.

16.6 Final certifications by budget band, 1998–2011

Table 16.4 shows that the reason for the decline in the Cultural Test median budget is the growth in the number of very low budget (under £2 million) films being certified. This growth has been particularly marked since 2006, suggesting that UK tax relief has become more accessible to low budget filmmakers, following the introduction of the new rules in 2007. The total number of medium and high budget Cultural Test films had remained fairly consistent from year to year over the last decade to 2010, but the number of high budget films (over £30 million) receiving final Cultural Test certification more than doubled in 2011 compared with 2010.

Table 16.4 Final Cultural Test certifications by budget band, 1998–2011

Budget band £ million	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
>30	2	3	1	3	2	2	5	5	2	3	9	4	6	13
10 – 30	2	3	3	10	13	3	7	9	7	7	6	7	9	7
5 – 10	5	12	14	7	10	5	13	7	9	9	11	8	10	15
2 – 5	20	26	43	24	13	25	23	25	21	18	9	24	16	20
=<2	11	24	47	31	39	41	24	20	35	61	62	101	129	134
Total	**40**	**68**	**108**	**75**	**77**	**76**	**72**	**66**	**74**	**98**	**97**	**144**	**170**	**189**

Source: DCMS, BFI.

Table 16.5 shows the distribution of Cultural Test budgets by budget band for all films certified in the years 2007 to 2011. The 5% of films with budgets over £30 million accounted for 72% of the aggregate budget, while the 70% of films with budgets under £2 million accounted for only 5% of the aggregate budget. This reflects both the growth in the number of low budget Cultural Test films and of big budget inward investment UK/USA titles in the top budget band.

Table 16.5 Final Cultural Test certifications, budget distribution by budget band, 2007–2011

Budget band £ million	Number	Total budget (£ million)	% number	% budget
>30	35	3,742.2	5.0	71.7
10 – 30	36	584.0	5.2	11.2
5 – 10	53	366.4	7.6	7.0
2 – 5	87	271.1	12.5	5.2
=<2	487	257.6	69.8	4.9
Total	**698**	**5,221.2**	**100.0**	**100.0**

Source: DCMS, BFI.

Note: Figures may not sum to totals due to rounding.

For co-productions the pattern is different. The rise and fall in co-production numbers is clear from Table 16.6, which also shows a disproportionate increase in large budget co-production certifications in 2004–2005. This reflects the structuring of some large budget UK/USA inward investment films as co-productions at that time, a practice that has fallen away since the tax rules changed.

Table 16.6 Final co-production certifications by budget band, 1998–2011

Budget band £ million	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
>30	–	–	–	1	1	–	8	4	2	2	–	–	–	1
10 – 30	–	2	2	7	14	11	20	15	5	7	2	1	3	3
5 – 10	5	2	4	8	12	18	14	32	20	13	1	4	5	1
2 – 5	6	6	13	19	21	39	40	39	28	25	4	1	7	8
=<2	5	3	3	6	8	16	17	16	13	9	1	2	4	1
Total	**16**	**13**	**22**	**41**	**56**	**84**	**99**	**106**	**68**	**56**	**8**	**8**	**19**	**14**

Source: DCMS, BFI.

The budget distribution for co-productions, for all films certified in 2007 to 2011, was much more even than for Cultural Test films, with just over 80% of films having budgets between £2 million and £30 million and accounting for 80% of the total budget, as shown in Table 16.7.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 16.7 Final co-production certifications, budget distribution by budget band, 2007–2011

Budget band £ million	Number	Total budget (£ million)	% number	% budget
>30	3	118.3	2.9	16.5
10 – 30	16	242.6	15.2	33.8
5 – 10	24	176.7	22.9	24.6
2 – 5	45	156.9	42.9	21.8
=<2	17	24.1	16.2	3.4
Total	**105**	**718.7**	**100.0**	**100.0**

Source: DCMS, BFI.

Note: Figures may not sum to totals due to rounding.

- For information on UK film production, see Chapter 17 (page 155)
- For details of the UK film economy, see Chapter 21 (page 189)
- For information on public investment in film in the UK see Chapter 18 (page 164)

- For information about British films, tax relief and the Cultural Test, see www.bfi.org.uk/film-industry/british-film-certification-and-tax-relief
- For more information on the European Convention on Cinematographic Co-production, see the Council of Europe website: http://conventions.coe.int (number 147 under the full list of treaties)

*Image: **The Iron Lady** courtesy of Pathé*

Chapter 17:

Film production in 2011

The value of production spend in the UK reached over £1.2 billion in 2011, due to record levels of inward investment. However, the overall spend on production was concentrated on a small number of films, with 62% of British domestic films made with budgets of less than £500,000.

Facts in focus:

- Total UK production activity in 2011 was £1,272 million, compared with £1,254 million in 2010.
- The UK spend associated with inward investment features was £1,012 million, the highest yet recorded, up 4% from £975 million in 2010.
- There were 200 UK domestic features (282 in 2010) and 42 co-productions (32 in 2010).
- 62% of UK domestic features were made with budgets of less than £500,000.
- Eighteen big budget films accounted for 78% of the total UK production spend in 2011.

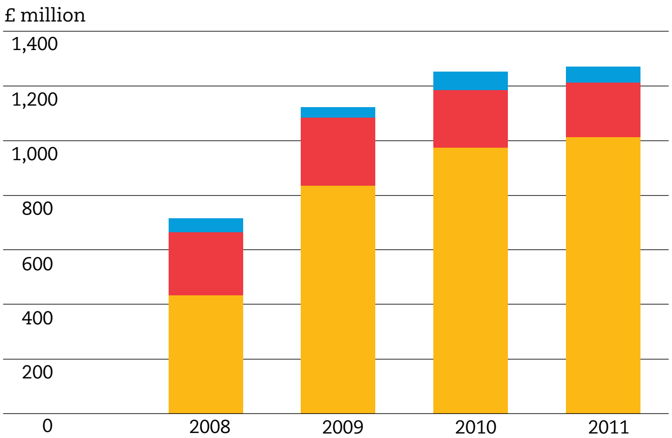
17.1 The value of UK production in 2011

The aggregate UK spend of features that commenced principal photography in 2011 was £1,272 million, the highest figure recorded (Figure 17.1).

Inward investment films contributed £1,012 million (80%) towards the total UK production spend in 2011, also the highest figure recorded. Some of the big budget films contributing to this figure were *The Dark Knight Rises, Dark Shadows, Prometheus, Skyfall, Snow White and the Huntsman, World War Z* and *Wrath of the Titans*.

Domestic UK features, including *Anna Karenina, Great Expectations, The Iron Lady, Now Is Good, The Sweeney* and *Welcome to the Punch*, spent £200 million in the UK, the lowest figure of the last four years. Official and unofficial co-productions contributed £60 million, down from almost £70 million in 2010. Co-productions in 2011 included *360, The Angels' Share, Byzantium, Shadow Dancer* and *StreetDance 2 3D*.

Figure 17.1 UK spend of features produced in the UK, 2008–2011, £ million



	2008	2009	2010	2011
Co-productions	51.0	38.6	69.6	60.2
Domestic UK films	231.7	249.4	209.1	199.9
Inward investment films	432.9	834.6	975.1	1,012.3
Total	**715.7**	**1,122.6**	**1,253.7**	**1,272.4**

Source: BFI.

Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
Films are allocated to the calendar year in which principal photography commenced.
Films with budgets under £500,000 are included in this analysis.

Notes:
Numbers have been revised on the basis of new information received since publication of the 2011 Statistical Yearbook.
Inward investment feature films include three non-USA films in 2009 and two non-USA films in 2010 and 2011. The category also includes five VFX-only films in 2011.

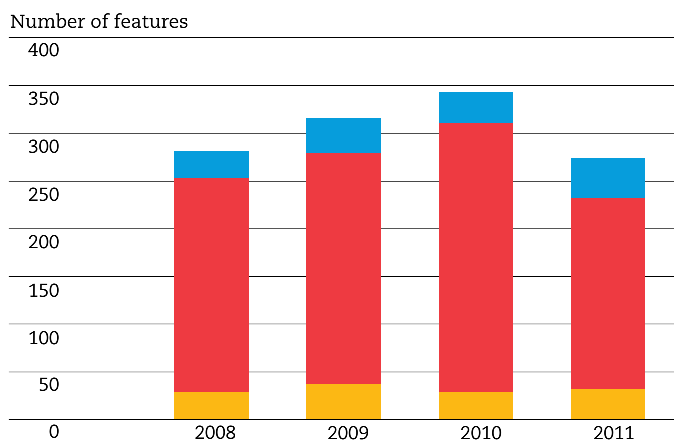
Definitions:
An inward investment film is defined as a feature film which is substantially financed and controlled from outside the UK and where the production is attracted to the UK because of script requirements, the UK's infrastructure or UK tax relief.
A domestic (indigenous) UK film is a feature made by a UK production company that is produced wholly or partly in the UK.
A co-production is a production (other than an inward co-production) involving various country partners usually under the terms of a bilateral co-production agreement or the European Convention on Cinematographic Co-production.

Measurement:
The above numbers include only the UK spend associated with productions shot or post-produced in whole or in part in the UK.
Spend is allocated to the year in which principal photography started or to the year in which the visual effects were undertaken in the case of VFX-only films.

17.2 The volume of UK production in 2011

In 2011, 274 films were produced wholly or in part in the UK, down from 343 in 2010. Of these, 42 were co-productions, 200 were domestic UK features (of which 124 had budgets under £500,000) and 32 were inward investment films (Figure 17.2).

Figure 17.2 Number of features produced in the UK, 2008–2011



	2008	2009	2010	2011
Co-productions	28	37	32	42
Domestic UK films	224	242	282	200
... of which budgets under £500,000	142	154	203	124
Inward investment films	29	37	29	32
Total	**281**	**316**	**343**	**274**

Source: BFI.

See notes to Figure 17.1.

According to the European Audiovisual Observatory, the UK is ranked sixth in the world in terms of the number of feature films produced.[1]

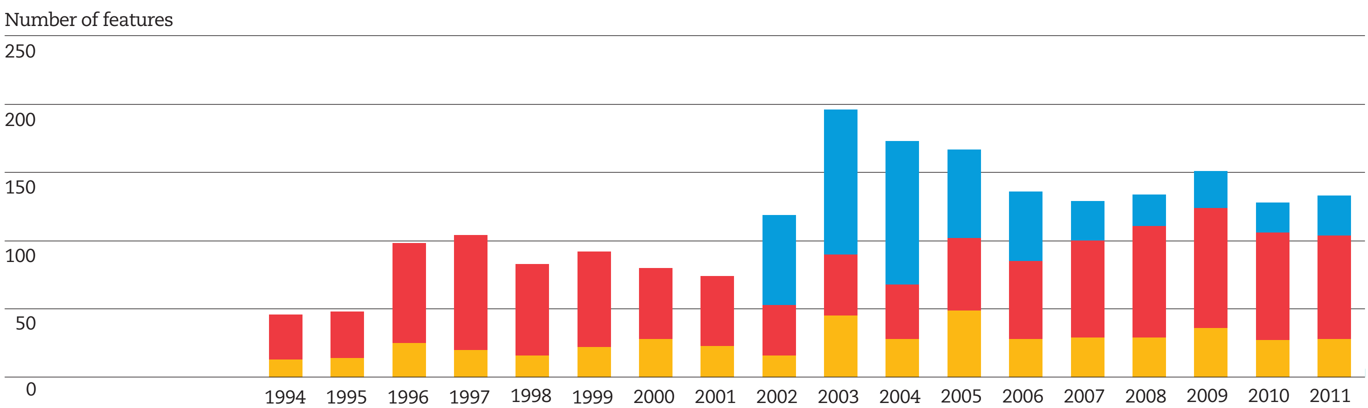
1 *Focus 2012 World Film Market Trends*, European Audiovisual Observatory and Marché du Film, Festival de Cannes

17.3 Trends in UK film production, 1994–2011

Prior to 2010, the Research and Statistics Unit tracked all features shooting in the UK with a minimum budget of £500,000. However, evidence from a variety of sources (data on British film certification and the 2008 UK Film Council report *Low and Micro-Budget Film Production in the UK*) revealed a substantial number of films produced below this budget level. In order to broaden the evidence base, production tracking was extended to include feature films with budgets under £500,000 and data was collected from 2008 onwards.

Figure 17.3 puts the 2011 figures in a longer time perspective, excluding those films made with budgets of less than £500,000. The decline in domestic features between 1997 and 2004 occurred alongside a substantial growth in co-production activity, suggesting it was easier at that time to make films as official co-productions than as stand-alone UK productions. From 2005 to 2008 this trend was reversed, reflecting a tightening in co-production certification requirements followed by the introduction of the new UK film production tax relief based on a film's UK spend rather than the entirety of the production budget. Minority co-productions saw the greatest reduction.

Figure 17.3 Number of inward, domestic, co-production and total features, 1994–2011



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Inward	13	14	25	20	16	22	28	23	16	45	28	49	28	29	29	36	27	28
Domestic	33	34	73	84	67	70	52	51	37	45	40	53	57	71	82	88	79	76
Co-production	–	–	–	–	–	–	–	–	66	106	105	65	51	29	23	27	22	29
Of which… majority and parity co-production	–	–	–	–	–	–	–	–	–	23	22	12	18	16	10	6	13	14
minority co-production	–	–	–	–	–	–	–	–	–	83	83	53	33	13	13	21	9	15
Total	**46**	**48**	**98**	**104**	**83**	**92**	**80**	**74**	**119**	**196**	**173**	**167**	**136**	**129**	**134**	**151**	**128**	**133**

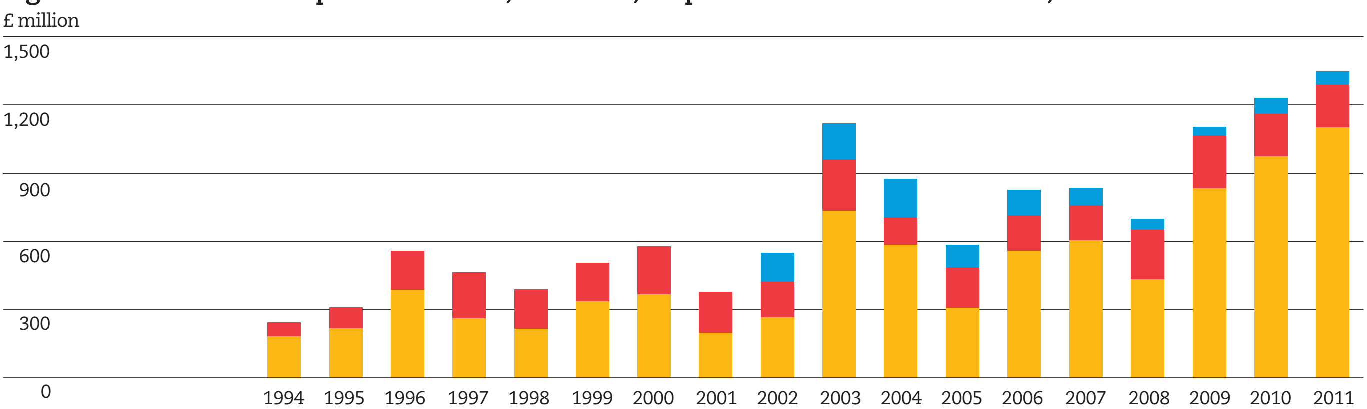
Source: BFI.

Notes:
Inward features include inward investment co-productions from 2002 and a small number of visual effects (VFX) only titles from 2007.
UK co-productions not available by shoot date prior to 2002.
Data for 2003–2011 updated since publication of the 2011 Statistical Yearbook.
Inward investment includes a spike in the number of non-USA (mainly Indian) inward investment films in 2005.
Majority co-production means a co-production in which the UK investment is the largest single national investment (not necessarily an absolute majority).
Parity co-production means a co-production in which the UK and at least one other country contributed equal largest investments.
Minority co-production means a co-production in which at least one other country made a larger investment than the UK.
Data for films with budgets greater than or equal to £500,000.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Since 1994, the variation in the total value of UK spend has principally been driven by fluctuations in inward investment. In contrast, the combined UK spend of co-productions and UK domestic films declined from £386 million in 2003 to £247 million in 2011, reflecting tougher economic conditions and changing arrangements for film tax relief. The majority of the fall is due to the decline in co-productions, the UK spend of which fell from £169 million in 2004 to £38 million in 2009, although this recovered to £59 million in 2011.

Figure 17.4 Value of UK spend of inward, domestic, co-production and total features, 1994–2011



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Inward	182.7	216.5	387.1	261.9	214.2	336.4	366.6	198.5	265.9	732.9	583.8	307.0	558.7	604.1	432.9	834.6	974.9	1,012.3
Domestic	59.5	94.0	172.2	202.9	175.0	170.3	211.7	180.1	156.4	227.8	122.3	180.1	156.6	154.4	217.7	232.7	187.3	187.7
Co-production	–	–	–	–	–	–	–	–	128.2	158.3	169.2	97.3	110.4	78.0	50.4	37.5	68.7	59.0
Of which… majority and parity co-production	–	–	–	–	–	–	–	–	–	62.1	52.0	34.6	67.3	52.6	32.5	14.1	53.6	30.0
minority co-production	–	–	–	–	–	–	–	–	–	96.2	117.2	62.6	43.1	25.4	17.9	22.0	15.1	29.0
Total	**242.2**	**310.5**	**559.3**	**464.8**	**389.2**	**506.7**	**578.3**	**378.6**	**550.5**	**1,119.0**	**875.3**	**584.4**	**825.6**	**836.5**	**700.9**	**1,104.8**	**1,230.9**	**1,258.9**

Source: BFI.

See notes to Figure 17.3.

17.4 Productions by genre, 2009–2011

Table 17.1 shows a breakdown of production by genre for the years 2009–2011. Drama accounted for 22% of the films, but only 7% of the budget and comedy accounted for 17% of the films and 9% of the budget. The biggest spending genres were action, fantasy, adventure and comedy. After drama and comedy, the most numerous genres were documentaries (16%), thriller (11.5%) and horror (11%).

Table 17.1 Genre of production in the UK, 2009–2011

Genre	Number of films	% of total	Budget £ million	% of total	UK spend £ million	% of total
Action	48	5.2	1,457.5	27.7	916.9	25.5
Adventure	9	1.0	563.3	10.7	426.4	11.9
Animation	17	1.8	222.1	4.2	135.5	3.8
Biopic	16	1.7	93.8	1.8	42.1	1.2
Comedy	155	16.9	489.9	9.3	337.8	9.4
Crime	30	3.3	51.9	1.0	49.0	1.4
Documentary	144	15.7	103.4	2.0	50.9	1.4
Drama	203	22.1	369.5	7.0	268.7	7.5
Family	7	0.8	14.1	0.3	12.7	0.4
Fantasy	13	1.4	749.4	14.2	662.2	18.4
Horror	100	10.9	300.4	5.7	248.3	6.9
Romance	48	5.2	138.7	2.6	87.9	2.4
Sci-fi	14	1.5	350.8	6.7	148.7	4.1
Thriller	106	11.5	356.9	6.8	197.9	5.5
War	5	0.5	8.1	0.2	4.9	0.1
Other	4	0.4	0.9	0.0	0.9	0.0
Total	**919**	**100.0**	**5,270.7**	**100.0**	**3,590.9**	**100.0**

Source: BFI.

Notes:
The data have been presented for a three-year period to show as many genres as possible without disclosing the budgets of individual films.
The category 'other' contains musical and western films, grouped because of their low numbers.
Percentages may not sum to 100 due to rounding.
Does not include VFX films.

Looking at UK independent films alone (Table 17.2) the top three genres in terms of numbers and budget were drama, comedy and documentary. Drama accounted for 23% of the films and 18% of the budget, followed by comedy (17% of films and 19% of the budget) but there was a reasonable representation of other genres, for example documentaries (16% of the films, 4% of the budget) thriller (12% of films, 15% of the budget) and horror (11% of the films, 4% of the budget).

Table 17.2 Independent UK productions by genre, 2009–2011

Genre	Number of films	% of total	Budget £ million	% of total	UK spend £ million	% of total
Action	38	4.4	197.0	15.0	67.2	7.8
Adventure	4	0.5	7.3	0.6	3.6	0.4
Animation	13	1.5	45.8	3.5	38.2	4.4
Biopic	14	1.6	47.7	3.6	37.3	4.3
Comedy	149	17.2	249.0	19.0	194.2	22.5
Crime	29	3.3	40.5	3.1	38.1	4.4
Documentary	142	16.4	56.3	4.3	39.0	4.5
Drama	198	22.8	237.2	18.1	170.0	19.7
Family	7	0.8	14.1	1.1	12.7	1.5
Fantasy	8	0.9	2.2	0.2	2.1	0.2
Horror	97	11.2	53.6	4.1	45.6	5.3
Romance	47	5.4	126.1	9.6	77.8	9.0
Sci-fi	9	1.0	31.1	2.4	19.4	2.2
Thriller	103	11.9	196.5	15.0	113.8	13.2
War	5	0.6	8.1	0.6	4.9	0.6
Other	4	0.5	0.9	0.1	0.9	0.1
Total	**867**	**100.0**	**1,313.4**	**100.0**	**864.8**	**100.0**

Source: BFI.

The category 'other' contains musical and western.
Percentages may not sum to 100 due to rounding.

17.5 Budget trends

The median budget of domestic UK features rose to £200,000 in 2011, compared with £100,000 in 2010 (Table 17.3). The median budgets for inward investment features and co-productions both fell compared with 2010; inward investment features decreased from £20 million to £15.4 million, while co-productions decreased from £2.8 million to £1.5 million.

Table 17.3 Median feature film budgets, £ million, 2008–2011

Production category	2008	2009	2010	2011
Inward investment films	10.4	12.1	20.0	15.4
Domestic UK films	0.2	0.2	0.1	0.2
Co-productions	1.6	1.4	2.8	1.5

Source: BFI.

Notes:
Median budget is the middle value (ie there are equal numbers of films above and below the median). The median in this case is a better measure of central tendency than the average as it avoids the upward skew of a small number of high budget productions.
Includes films with budgets of less than £500,000.

17.6 Size distribution of budgets

The budget size distribution for the three main categories of films made in 2011 is shown in Tables 17.4 to 17.6. Fifteen features with budgets of over £30 million accounted for 92% of the total budget for inward investment features. Only six of 32 inward features had budgets between £500,000 and £5 million.

Table 17.4 Size distribution of budgets, inward investment features, 2011

Budget band	Number	Total budget in band (£ million)	% of total budget
>£30 million	15	1,653.6	92.1
£10–£30 million	7	105.2	5.9
£5–£10 million	4	30.3	1.7
£0.5–£5 million	6	5.6	0.3
Total	**32**	**1,794.6**	**100.0**

Source: BFI.

Note: Figures may not sum to totals due to rounding.

In contrast, the majority of domestic UK features (62%) had budgets under £500,000 (Table 17.5).

Table 17.5 Size distribution of budgets, domestic UK features, 2011

Budget band	Number	Total budget in band (£ million)	% of total budget
>£5 million	9	102.7	45.6
£2–£5 million	24	65.5	29.1
£0.5–£2 million	43	44.2	19.6
Under £0.5 million	124	12.9	5.7
Total	**200**	**225.3**	**100.0**

Source: BFI.

Ten out of 42 co-productions had budgets over £5 million, accounting for over 75% of the total budget (Table 17.6). The 13 co-productions with budgets under £500,000 accounted for 1% of the total budget.

Table 17.6 Size distribution of budgets, co-productions, 2011

Budget band	Number	Total budget in band (£ million)	% of total budget
>£5 million	10	139.7	75.6
£2–£5 million	10	32.6	17.7
£0.5–£2 million	9	10.0	5.4
Under £0.5 million	13	2.4	1.3
Total	**42**	**184.7**	**100.0**

Source: BFI.

17.7 Big budget productions, 2008–2011

The importance to UK spend of a small number of big budget productions – usually inward investment films – is demonstrated in Table 17.7. In 2011, the 18 films with budgets greater than £30 million accounted for 78% of UK production spend.

Table 17.7 Big budget films' contribution to UK spend, 2008–2011

	2008	2009	2010	2011
Number of films with budgets >£30 million	13	16	13	18
Value of associated UK spend (£ million)	410.8	748.9	926.3	990.8
Total UK spend (£ million)	690.7	1,087.9	1,165.4	1,272.4
Big budget film % of UK spend	59.5	68.8	79.5	77.9

Source: BFI.

Data for 2008–2010 updated since publication of the 2011 Statistical Yearbook.

17.8 UK spend as percentage of total production budget

Table 17.8 shows UK spend as a percentage of production budget for inward investment films, UK domestic productions and co-productions. UK domestic productions had the highest UK spend percentage in 2011 (89%), followed by inward investment films at 64%. Co-productions had the lowest UK spend percentage (33%).

Table 17.8 UK spend as percentage of total production budget, 2008–2011

Production category	2008	2009	2010	2011
Inward investment films	66.6	66.6	75.5	63.6
UK domestic films	76.7	82.4	87.6	88.7
Co-productions	43.5	37.6	41.2	32.6

Source: BFI.

Notes:
Data for 2008–2010 updated since the publication of the 2011 Statistical Yearbook.
VFX-only films not included in 'Inward investment films'.

17.9 UK domestic productions by territory of shoot

Table 17.9 analyses UK domestic productions in 2011 according to whether they were wholly or partly shot in the UK, or wholly shot abroad. The majority (165 out of 200) were shot exclusively in the UK, while 19 films were shot partly abroad and 16 films were shot wholly abroad. The non-UK spend as a proportion of budget was 11%.

Table 17.9 UK domestic productions by territory of shoot, 2011

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	165	171.9	6.2	3.6
UK and other	19	46.5	15.4	33.1
Other only	16	6.9	3.8	55.1
Total UK domestic films	**200**	**225.3**	**25.4**	**11.3**

Source: BFI.

Table 17.10 shows the number of shoots by territory for UK domestic films. Because some films were shot in two or more territories, the total number of shoots was greater than the total number of films. There were four shoots in France, four in Spain, three in the USA, and single shoots in various other international territories.

Table 17.10 UK domestic productions, shoots by territory, 2011

Territory of shoot	Number of shoots
UK	195
France	4
Spain	4
USA	3
Other Europe	5
Other	9
Total shoots	**230**

Source: BFI.

17.10 Co-productions by territory of shoot

In contrast to UK domestic productions, co-productions were usually shot partly or wholly abroad, as Table 17.11 shows. Only four out of 42 films, with a total budget of £9 million, were shot wholly in the UK. Non-UK spend accounted for 67% of the total budget of co-productions in 2011.

Table 17.11 Co-productions by territory of shoot, 2011

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	4	8.9	0.6	6.7
UK and other	16	78.6	51.4	65.4
Other only	22	97.2	72.4	74.5
Total co-productions	**42**	**184.7**	**124.5**	**67.4**

Source: BFI.

The country distribution of co-production shoots is shown in Table 17.12. The majority of shoots were in the UK or elsewhere in Europe. Of the non-European shoots, three were in Canada and two each in Australia and South Africa.

Table 17.12 Co-productions, shoots by territory or region, 2011

Country	Number of shoots
UK	26
Republic of Ireland	8
Germany	7
Bulgaria	6
USA	6
Jamaica	5
Slovakia	5
Belgium	4
France	3
Switzerland	3
Mexico	2
Philippines	2
Spain	2
Sri Lanka	2
Other Europe	1
Other	7
Total shoots	**89**

Source: BFI.

Note: The majority of co-productions were shot in at least two territories. Hence the total in Table 17.12 is more than the number of co-productions in 2011.

- Information about film companies is given in Chapter 20 (page 179)
- For details about employment in the film production sector see Chapter 22 (page 198)
- For more information about the UK film economy see Chapter 21 (page 189)

Chapter 18:

Public investment in film in the UK

In recognition of the cultural and economic value of film, the UK Government and the European Union provide financial support to film in the UK through a variety of channels. The single biggest source of public funding in 2010/11 was film tax relief, followed by Department for Culture, Media and Sport grant-in-aid and National Lottery funding.

Facts in focus:

- Total measured public funding for film in the financial year 2010/11 was £358 million.
- The principal sources of public funding for UK film in 2010/11 were the film production tax relief (56% of public funding), grant-in-aid from central government (14%) and the National Lottery (12%).
- Film production took 73% of the total financial support, followed by archives and heritage (6%) then education, young people and lifelong learning (5.5%).

18.1 Public funding for film in the UK by source

Public funding for film identified in Table 18.1 is estimated to have been £358 million in the financial year 2010/11, up 35% from £266 million in 2009/10. The estimate does not include Scottish funding, some local authority, research council, higher or further education funding.

The largest source of public funding was the UK film tax relief, which provided £200 million in 2010/11 (56% of the total). The second largest source was Department for Culture, Media and Sport (DCMS) grant-in-aid to the UK Film Council and the National Film and Television School (NFTS) (£49 million, 14% of the total) and the third largest was the National Lottery (£42 million, 12% of the total). BBC Films contributed £12.3 million and Film4 £10 million. The European Union (EU) contributed £10.7 million, of which £6.5 million (£5.1 million in 2009/10) came from the MEDIA Programme.

Table 18.1 Public funding for film in the UK by source, 2010/11

Source	Amount £ million	% of total	Notes
DCMS grant-in-aid to the UK Film Council and NFTS	48.7	13.6	Awards to the UK Film Council and NFTS
National Lottery Distribution Fund (DCMS) – Film	42.0	11.7	National Lottery allocations to the UK Film Council, Scottish Screen/Creative Scotland(1), Film Agency for Wales, Northern Ireland Screen, plus Heritage Lottery Fund and award from the London Organising Committee of the Olympic and Paralympic Games for Film Nation
BBC Films	12.3	3.4	BBC Films' production investment – excludes acquisitions, etc made by other BBC departments
National and Regional Development Agencies	10.0	2.8	Contributions to the National and Regional Screen Agencies (N/RSAs)
Film4	10.0	2.8	Film4 (Channel 4's film production company) investment in film development and production
Department for Education	8.3	2.3	
EU MEDIA Programme(2)	6.5	1.8	
Other public sector	6.1	1.7	Very small awards (under £10,000) from a range of public sector agencies
Northern Ireland Executive	6.0	1.7	Includes spend from all Northern Ireland government agencies into strategic bodies/projects
Other EU	4.2	1.2	European Regional Development Fund and European Social Fund
Welsh Assembly Government	2.0	0.6	Includes spend from all Welsh government agencies into strategic bodies/projects
Skills Investment Fund Training Levy	0.6	0.2	Made up of contributions from all film productions either based in the UK or in receipt of UK public funding, collected and re-distributed by Creative Skillset.
Higher Education Funding Councils (HEFC)	0.4	0.1	HEFC investment in Creative Skillset film academies and a small number of projects by strategic agencies(3)

*Image: **The Angels' Share** courtesy of Entertainment One UK*

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 18.1 Public funding for film in the UK by source, 2010/11 (continued)

Source	Amount £ million	% of total	Notes
Local government	0.4	0.1	Investment by local authorities in N/RSA activities
Arts Councils[(4)]	0.3	0.1	
Foreign and Commonwealth Office	0.1	<0.1	Funding for UK originated British Council activity. Excludes partnership funding of 'in country' events (outside the UK)
Total public sector selective investment	**157.8**	**44.1**	National Lottery and grant-in-aid from all sources as above
UK film production tax relief (HMRC)[(5)]	200.0	55.9	Cost of film tax relief in 2010/11
Total public sector selective and automatic investment	**357.8**	**100.0**	Sum of all the above

Source: BFI.

Notes:
1. Scottish Screen merged with the Scottish Arts Council on 1 July 2010 to become Creative Scotland.
2. Investment for the MEDIA Programme is for awards made from 1 April 2010 to 31 March 2011.
3. Includes the Higher Education Funding Councils for England, Scotland and Wales, and investment from the Joint Information Systems Committee (JISC) which is HEFCE-funded.
4. Arts Council England, Arts Council of Wales, Arts Council Northern Ireland, Creative Scotland. Does not include Arts Councils' direct investments in artists' film and video.
5. *Film Tax Relief Summary,* HMRC, August 2011.

18.2 Activities supported by public spend on film

The various activities supported by public spend on film in the UK in 2010/11 are shown in Table 18.2. As in previous years, film production took the largest share accounting for £250 million (73% of the total). Film archives and heritage was second with £19 million (6%), followed by education, young people and lifelong learning (5.5%) and distribution and exhibition (5%).

Table 18.2 Activities supported by public spend on film, 2010/11

Activity	Amount £ million	% of total
Production[(1)]	249.9	73.4
Film archives and heritage[(2)]	19.3	5.7
Education, young people and lifelong learning	18.6	5.5
Distribution and exhibition	16.7	4.9
Training and skills[(3)]	11.6	3.4
Administration and services to the public	10.5	3.1
Export and inward investment promotion[(4)]	3.3	1.0
Other	10.6	3.1
Total public film expenditure	**340.5**	**100.0**

Source: BFI.
Percentages may not sum to 100 due to rounding.

Notes:
1. Non-tax relief production spend in 2010/11 was £49.9 million.
2. BFI National Archive, National/Regional Screen Archives, Heritage Lottery Fund investments.
3. Skills Investment Fund, National/Regional Screen Agency training investment, film/craft and technical skills academies.
4. British Film Commission; British Council, locations services in the nations and regions.

18.3 BFI and UK Film Council Lottery awards, 2011

Table 18.3 shows the Lottery awards made by the BFI and the UK Film Council in 2011. (The BFI became the Lottery distributor for film funding on 1 April 2011, when it took over the majority of the UK Film Council's previous functions.) There were 275 awards in total (251 in 2010), to a combined value of £24.6 million (£18.2 million in 2010). Most of the awards were for relatively low amounts (£50,000 and under) made by the Transition Fund and the development arm of the Film Fund.

Table 18.3 BFI and UK Film Council Lottery awards, 2011

	Number of awards	Total value £ million
Film Fund – development	131	3.0
Transition Fund	60	1.3
Film Fund – production	35	15.3
Prints and Advertising Fund	35	4.2
Film Fund – short film	7	0.1
New Cinema Fund	2	0.3
Film Fund – completion	2	0.4
Film Export Festival Support Fund	2	<0.1
Film Fund – pilots	1	<0.1
Total awards	**275**	**24.6**

Source: BFI.

Note: BFI and UK Film Council awards data are for calendar year 2011.

The large awards (£250,000+) made by the BFI and the UK Film Council in 2011 are shown in Table 18.4. The biggest award (£2 million) was for the Film Fund film *Great Expectations*.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 18.4 Large awards (£250,000+) made by BFI and UK Film Council, 2011

	Project (total = 25)	Amount of award £
Prints and Advertising Fund	A Lonely Place to Die	299,900
	Shame	250,000
	The Skin I Live In	250,000
Film Fund	Great Expectations	2,000,000
	Under the Skin	1,673,744
	Seven Psychopaths	1,000,000
	360	950,000
	Spike Island	900,000
	Trap for Cinderella	800,000
	Shadow Dancer	750,000
	The Angels' Share	750,000
	Now is Good	674,750
	Trishna	650,000
	Fast Girls	630,000
	StreetDance 2 3D	500,000
	Welcome to the Punch	500,000
	Last Passenger	428,000
	Shell	400,000
	This is London	355,000
	Mister John	300,000
	The Sightseers	300,000
	The Pervert's Guide to Ideology	270,000
	Broken	267,500
	Wuthering Heights	260,000
New Cinema Fund	The Berberian Sound Studio	329,500

Source: BFI.

Note: BFI and UK Film Council awards data are for calendar year 2011.

18.4 Leading public investors in British film production, 2009–2011

Table 18.5 shows the leading public agency and public service broadcaster investment in British films for the calendar years 2009–2011. The most frequent public investor was the UK Film Council and the BFI with 69 projects (combined budget £241 million), followed by BBC Films/BBC (62 projects, combined budget £243 million) and Film4/Channel 4 (56 projects, £154 million). These budget figures are for the total budget of the films, including the share of the budget provided by private investors and pre-sales.

Table 18.5 Leading public investors in British film production, 2009–2011

Public funder	Number	Estimated budget £ million	Selected titles
UK Film Council/BFI	69	241	The Angels' Share, Fast Girls, Great Expectations, The Iron Lady, The King's Speech, Salmon Fishing in the Yemen, StreetDance 2 3D, We Need to Talk About Kevin, Welcome to the Punch, The Woman in Black
BBC Films/BBC	62	243	360, The Awakening, Brighton Rock, Jane Eyre, My Week with Marilyn, Oranges and Sunshine, Tamara Drewe, West is West
Film4/Channel 4	56	154	127 Hours, Another Year, The Eagle, Four Lions, The Inbetweeners Movie, Kill List, Neds, One Day, Submarine
Scottish Agencies	22	55	Citadel, The Decoy Bride, Lore, Outcast, Perfect Sense, Under the Skin
Northern Film and Media	21	19	All in Good Time, Flutter, Song for Marion, Ways to Live Forever
Irish Film Board(1)	20	48	The Guard, Good Vibrations, Dreams of a Life
Welsh Agencies	18	33	Hunky Dory, Mr Nice, Patagonia, Resistance, Submarine
Northern Ireland Screen	9	59	Killing Bono, Jump, Whole Lotta Sole, Your Highness
EM Media	9	6	Best Laid Plans, High Hopes, Weekender
Film London	9	1	The British Guide to Showing Off, Ill Manors, Strawberry Fields
Screen Yorkshire	6	11	Kill List, Tyrannosaur, Wuthering Heights

Source: BFI production tracking. In some cases more than one public agency contributed funding to the same film, so there is some double counting of budgets in the above table. Hence there is no 'total budget' row.
Data in this table are for the calendar years 2009–11.

Note:
1. The Irish Film Board was one of a number of overseas public agencies that part-funded British films during the period. Others included Screen Australia, Icelandic Film Centre, Isle of Man Film, Filmburo Bremen, Medienboard Berlin-Brandenburg, Filmstiftung Nordrhein-Westfalen, FondsSud (France) and the New Zealand Film Fund.

- For more information on film production in the UK see Chapter 17 (page 155)
- For more information on the UK film economy see Chapter 21 (page 189)
- For more information on UK film companies see Chapter 20 (page 179)

Chapter 19:

Film education

Film education gives children and young people opportunities to watch, understand and make films to enrich their lives, express their creativity and gain practical skills. For older learners film education can also be a stimulating part of lifelong learning.

Facts in focus:

- Almost 68,000 students were entered for GCSE media studies related subjects in 2010/11, up 48% in six years.
- There were 4,500 students enrolled in higher education film studies courses in 2010/11, an increase of 202% on 2003/04, and the number enrolled on film production courses increased nearly fourfold over the same period.
- Taken across the full range of its activity, the reach of Film Education is estimated to be 2.2 million pupils annually.
- By the end of 2011 there were 7,568 school film clubs in England, Wales and Northern Ireland, with an estimated 219,472 pupils involved.
- There were 39,000 admissions to BFI Southbank education events in 2010/11, and 92,000 video streaming requests were made via the Screenonline website.
- There is evidence that 381 moving image education providers were operating in the UK in 2012; nearly one quarter were production companies and one fifth were venues.

19.1 Learning about and through film

Film education takes place in both formal and informal settings, from schools and colleges to voluntary interest groups like youth clubs and film societies. Film is a rich and versatile medium for exploring subjects in the classroom and elsewhere, as well as a worthwhile and rewarding object of study in its own right. This chapter presents the most complete record of film education related data currently available, beginning with a look at activity in formal education settings.

19.2 Film education in formal education settings

Film education activity generally involves watching and listening to a range of film texts, discussing and analysing them; generating discursive and written work, storyboards and scripts; making films and re-purposing archive material.

Outside of dedicated film and media studies courses, film is also used in other parts of the curriculum, such as in English or modern languages, and recent survey research has begun to identify the benefits to teachers and pupils. In 2011, Film: 21st Century Literacy, a consortium of education providers led by the BFI, Creative Skillset, FILMCLUB, Film Education and First Light conducted a large scale survey of UK secondary and primary schoolteachers to find out what they think about the use of film in subject areas where teaching film was not already compulsory (see link at end of chapter).

A total of 387 teachers and other educators completed the survey, 63% of whom had used film as a teaching aid at least four times in the past three years. Nearly every person who responded reported at least one beneficial change in pupils' behaviour, performance at school or film industry knowledge as a result of film-based activity in the classroom. When asked which of the improvements was the most dramatic, teachers rated 'attitude towards learning' and 'motivation to learn' as the most significant.

There was overwhelming support for the provision of additional film education opportunities across the curriculum for young people, with 97% of teachers stating they would like to see more offered at their school. According to respondents, one particular area where further support is needed is initial teacher training; 96% of teachers think film related training should be included in teacher training programmes.

In terms of film and media specific subjects taught in schools and colleges, there has been a 48% increase in the number of students entering GCSE media, film or TV studies in England, Wales and Northern Ireland since 2004/05 (Table 19.1). Almost 68,000 students entered in 2010/11, 1.3% of all GCSE entries. This includes over 4,600 candidates entered for the Film Studies GCSE offered by WJEC in 2011.

Table 19.1 Entries for GCSE media/film/TV studies in England, Wales and Northern Ireland, 2004–2011

Number of media/film/TV studies entries	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	% change 2004–2011
England	42,483	54,126	62,683	65,693	63,685	63,134	62,915	+48
Northern Ireland	785	780	868	842	849	925	1,161	+48
Wales	2,415	2,615	2,874	3,288	3,438	3,705	3,357	+39
Total	**45,683**	**57,521**	**66,425**	**69,823**	**67,972**	**67,764**	**67,433**	**+48%**
All GCSE entries	5,875,373	5,736,505	5,752,152	5,827,319	5,669,077	5,469,260	5,151,970	–12%

Source: Joint Council for Qualifications (JCQ).

Notes:
These numbers, published in August 2011, are provisional and do not include the results from any appeals, declines or late cash-ins.
Scotland is not included because of separate examinations system.

The number of students taking GCE A Level media, film or TV studies in England, Wales and Northern Ireland has risen by 20% since 2004/05 (Table 19.2). There were nearly 34,000 entries in 2010/11, 4% of all A Level entries. Of these, 7,164 candidates entered examinations for the WJEC Film Studies A Level (this is a provisional number).

Image: ***War Horse*** *© 2012 DreamWorks II Distribution Co., LLC*

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 19.2 Entries for GCE A Level media/film/TV studies in England, Wales and Northern Ireland, 2004–2011

Number of media/film/TV studies entries	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	% change 2004–2011
England	26,633	29,123	30,036	30,651	31,618	31,032	31,400	+18
Northern Ireland	468	602	654	745	897	963	1,052	+125
Wales	1,160	1,239	1,252	1,353	1,307	1,380	1,403	+21
Total	**28,261**	**30,964**	**31,942**	**32,749**	**33,822**	**33,375**	**33,855**	**+20**
All GCE A Level entries	783,878	805,698	805,657	827,737	846,977	853,933	867,317	+11

Source: Joint Council for Qualifications (JCQ).

See notes to Table 19.2.

Meanwhile, the number of entries for Scottish Higher media studies has fluctuated since 2004 (Table 19.3). In 2011 there were two entries for the Scottish Advanced Higher in media studies.

Table 19.3 Entries for Scottish Higher media studies, 2004–2011

	2004	2005	2006	2007	2008	2009	2010	2011	% change 2004–2011
Number of media studies entries	827	814	843	819	797	765	803	870	+5
All entries	165,575	164,142	159,140	161,081	162,576	167,792	175,614	178,925	+8

Source: Scottish Qualifications Authority.

Film Education is an organisation funded by the film industry to provide structured programmes for the teaching of film criticism and appreciation within schools and offers professional development opportunities and resources for teachers. The organisation has 98% of primary schools and 74% of secondary and other schools on its contacts database, enabling it to reach 29,787 (95%) of the 31,496 schools in the UK.

In 2011, Film Education provided 15 disc and web-based resources, free of charge, to 20,000 schools across the UK, delivered via 88,000 DVD units, 45,000 wallcharts, 14 web-based microsites and a pilot project 'App'. These resources are estimated to have reached 2.2 million pupils.

Film Education's flagship event, National Schools Film Week, is the largest free festival for school groups and cinemas in the world. In 2011, over 469,000 schoolchildren visited the cinema for free as part of the event (Table 19.4). In 2011, 709 teachers took part in 21 events including the Film Industry Conference aimed at Film and Media Studies educators. The organisation also ran national classroom-based competitions supporting industry issues and specific film releases, including Young Film Critic (over 1,000 entries), 'Diary of a Wimpy Kid' (6,700 entries) and Be©reative (400 entries).

Table 19.4 Attendances at National Schools Film Week and other Film Education screenings, 2002–2011

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
National Schools Film Week attendances	75,490	105,392	125,761	213,794	259,964	298,586	335,733	392,452	473,000	469,000
Other Film Education screenings	n/a	25,755	24,803	12,737	35,756	34,188	23,754	13,481	5,400	12,380

Source: Film Education.

Study of the moving image and allied creative industries remains popular in UK higher education through media and film studies courses. Over 31,000 students were enrolled on media studies related courses in 2010/11, up 20% in eight years (Table 19.5). The film studies subject area saw an increase of 202% in numbers over the same period, from 1,490 first degree and postgraduate students in 2003/04 to 4,500 in 2010/11, and the number enrolled on film production courses increased nearly fourfold over the same period.

Table 19.5 Higher education students in the subject area media studies, 2003–2011

	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	% change 2003/04–2010/11
All media studies related courses	26,135	26,495	26,665	27,010	28,085	28,245	30,815	31,480	+20%
Media studies	20,215	20,200	19,785	18,995	17,860	17,595	19,190	19,690	–3%
Film studies	1,490	1,840	2,155	2,540	3,610	3,815	4,250	4,500	+202%
Film production	135	165	420	545	520	530	680	675	+396%

Source: HESA Student Record 2003/04–2010/11.

Notes:
Figures have been rounded to nearest multiple of 5.
Includes first degree, postgraduate and other degrees.
Media studies related courses include media, film, television, radio, electronic and print-based media studies courses.

In the last few years Creative Skillset, the creative industries' sector skills council, has worked with industry and further and higher education institutions to establish a network of film and media academies recognised as centres of excellence in either film or television and interactive media. The three members of the film academy network are endorsed by the film industry as providers of the highest standard of relevant vocationally orientated education, training and development at a further, higher and postgraduate level. In 2011/12 the network offered 20 courses (National Film and Television School, 13; Screen Academy Scotland, five; and London Film School, two) with 360 students enrolled.

In addition to the work of the film and media academies, recent research commissioned by Creative Skillset throws light on the employment destinations of higher education graduates, based on analysis of HESA data (see link at end of chapter).

The research found that of all students (286,971) to gain employment six months after completing their course in 2009/10, 1,891 (0.7%) found work in the film industry. Of the 17,434 students who completed film relevant courses in 2009/10 (which include a wide range of subjects that could lead to someone working within film, eg textiles technology), 692 (4%) found employment in the film industry within six months of graduating.

19.3 National and regional film education providers

The BFI aims to ensure that everyone in the UK, particularly young people, can learn about and enjoy the widest range of film. It runs programmes for learners of all ages at BFI Southbank, as well as providing resources to support film education and research across the UK. Table 19.6 provides details of some of the BFI's main education activities.

In 2010/11 there were 38,707 admissions to BFI Southbank education events (up 97% on 2004/05) and 4,825 education admissions to BFI Festivals (down 11% on 2004/05). The number of visits to the BFI National Library was higher in 2010/11 (10,983) than in the previous year, whereas the number of BFI information service enquiries was lower (18,444).

The BFI Screenonline website (www.screenonline.org.uk) is a web-based encyclopaedia of British film and television featuring hundreds of hours of clips from the BFI National Archive, supplemented by contextual material, stills, posters and press books. Users in UK schools, colleges, universities and libraries can access the entire site for free, and in 2010/11 there were over 92,000 video streaming requests.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 19.6 BFI education activity, 2004–2011

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
BFI Southbank education event admissions	19,625	15,149	12,648	33,945	30,999	32, 954	38,707
BFI Festivals education admissions	5,451	4,881	4,106	3,733	5,698	5,615	4,825
BFI National Library visits	n/a	12,331	11,919	11,905	12,024	10,969	10,983
BFI information service enquiries	n/a	27,044	25,655	25,711	19,539	29,341	18,444
BFI Screenonline video streaming requests	n/a	n/a	n/a	n/a	172,142	115,194	92,020
Sales of BFI education resources*							
copies of short film resources	n/a	n/a	n/a	n/a	3,618	908	1,128
copies of other resources	n/a	n/a	n/a	n/a	1,301	1,314	743

Source: BFI.

* Each resource reaches an average of 50 students or pupils.

FILMCLUB, an education charity supported by the Department for Education, the Welsh Assembly and LOVEFiLM, has developed a network of school film clubs across England, Wales and Northern Ireland which currently run in 7,568 primary and secondary schools, reaching 219,472 pupils weekly during term time.

FILMCLUB encourages children and young people to learn through film and to develop their critical thinking, literacy and discussion skills as well as a long-term relationship with film. Since its national roll out in 2008, FILMCLUB has helped teachers and their pupils watch and discuss a diverse range of films from around the world. Although schools within the scheme can use their own DVDs, FILMCLUB has supplied 181,593 films including 3,053 unique titles, covering 46 languages and 130 countries. Table 19.7 outlines the national and regional distribution of film clubs in England, Wales and Northern Ireland.

Table 19.7 National and regional distribution of FILMCLUB schools in England, Wales and Northern Ireland, 2011

	Number of schools with FILMCLUB	% of FILMCLUB schools	% of English schools	Number of members
East Midlands	853	11.3	9.4	24,737
East of England	675	8.9	11.4	19,575
London	1,016	13.4	11.1	29,464
North East	441	5.8	5.4	12,789
North West	1,074	14.2	14.6	31,146
South East	982	13.0	15.5	28,478
South West	795	10.5	10.8	23,055
West Midlands	719	9.5	10.9	20,851
Yorkshire and The Humber	756	10.0	10.5	21,924
Northern Ireland	68	0.9	n/a	1,972
Wales	189	2.5	n/a	5,481
Total	**7,568**	**100.0**	**100.0**	**219,472**

Source: FILMCLUB.

Note: Percentages may not sum to 100 due to rounding.

Learning about film can be enhanced by practical involvement in filmmaking, which gives learners the opportunity to see for themselves how images and sounds are recorded and combined to create meaningful stories. There are a number of opportunities to gain filmmaking experience outside of professional film production. One of these, First Light, was established to fund and mentor children and young people aged 5 to 19 to make short digital films. Over the last decade it has supported the production of over 1,100 films involving more than 18,200 children and young people (Table 19.8).

Table 19.8 First Light Projects, 2001–2011

Year	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Number of films made	10	155	121	150	114	121	117	90	142	150
Number of young people participating	143	2,178	1,988	2,470	1,694	1,644	1,840	1,291	2,240	2,742

Source: First Light.

In the run up to the 2012 London Olympics, First Light supported Film Nation, a national short filmmaking competition. In 2010/11 1,996 young people took part in the competition, completing 245 short films.

Also during 2010/11, First Light piloted Second Light, a new talent development training scheme involving 28 young people aged 18 to 23 from diverse backgrounds. The scheme aimed to bridge the gap between First Light's digital film scheme and film industry new entrant training.

First Light was also the lead partner for the Mediabox consortium, funded by the Department for Education until 2010/11, which offered disadvantaged young people aged 13 to 19 the opportunity to develop and produce creative media projects, using film, television, print, radio, games, interactive or online platforms. Between 2007/08 and 2010/11 Mediabox enabled over 11,600 young people to participate in the making of 407 films.

19.4 Moving image education providers in the UK

A number of other organisations are involved in the delivery of film education in the UK. For the third year running the BFI compiled a database of moving image education providers from information supplied by Creative England, Creative Scotland, the Film Agency for Wales, Northern Ireland Screen, Film London, First Light, Media Education Wales, REd REx network, the MovIES network, Arts Council England's national and regional offices and others.

The database includes details of organisations actively engaged in providing moving image education directly to learners as part of their core activity. It does not include organisations that fund such activity or support it through the provision of learning resources, nor does it include schools, colleges or universities (although many of the organisations in the database work with formal education institutions). Neither does it include organisations that solely deliver industry training, but it does include training bodies that operate non-vocational educational programmes alongside their training activity. Finally, it does not include organisations that solely provide teacher training and continuing professional development (CPD).

There is evidence that 381 moving image education providers were operating in the UK as at April 2012 (Table 19.9). The largest proportion of moving image education providers is found in London (18% of the total). London, the East Midlands, West Midlands, Scotland, Wales and Northern Ireland all have a higher proportion of providers than their UK population share. The reverse is true for Yorkshire and The Humber, the South East, South West, North West and the East of England.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 19.9 Number of moving image education providers by nation/region, 2012

Nation/region	Number	%	% UK population
London	67	17.6	12.4
West Midlands	36	9.4	8.8
East Midlands	35	9.2	7.2
South West	28	7.3	8.5
Yorkshire and The Humber	27	7.1	8.5
South East	25	6.6	13.6
North West	24	6.3	11.3
North East	16	4.2	4.2
East of England	12	3.1	9.3
England sub-total	**270**	**70.8**	**83.8**
Scotland	43	11.3	8.4
Wales	38	10.0	4.9
Northern Ireland	30	7.9	2.9
UK total	**381**	**100.0**	**100.0**

Source: BFI Moving Image Education Providers Database.

Nearly one in four (23%) of all moving image education providers are production companies, one in five are venues (18%) and the same proportion are arts organisations (Table 19.10). Education/training organisations make up 13% of providers while participatory media organisations constitute a further 10%.

Table 19.10 Number of moving image education providers by type, 2012

Type	Number	%
Production company/corporate video	88	23.1
Venue	67	17.6
Arts organisation	67	17.6
Education/training	50	13.1
Participatory media	37	9.7
Festival	30	7.9
Archive	20	5.2
Community group	16	4.2
Other	6	1.6
Total	**381**	**100.0**

Source: BFI Moving Image Education Providers Database.

Notes:
'Production company/corporate video' includes feature and short film production companies and businesses offering corporate video services.
'Venue' includes cinemas, film clubs and local authority-run mixed arts venues that offer in-house education activities.
'Arts organisation' includes community arts projects, artist collectives and art galleries that offer moving image-based activity.
'Education/training' includes dedicated education and/or training providers, often working in partnership with formal education institutions.
'Participatory media' includes non-profit, community-based filmmaking enterprises.
'Festival' includes film festivals that offer a dedicated education strand.
'Archive' includes moving image archives offering dedicated education activities.
'Community group' includes youth clubs and other local groups that offer filmmaking opportunities as part of their core activity.
'Other' includes membership-based organisations that offer education opportunities (eg professional networks) and museums.

Almost two thirds (64%) of moving image education providers offer production-based learning opportunities, and a further 17% offer a mix of production and exhibition-based education (Table 19.11). Learning activity through watching films (exhibition-based) is offered by 14% of providers, while 6% offer archive-based learning.

Table 19.11 Type of provision given by moving image education providers, 2012

Type	Number	%
Production-based	242	63.5
Mixed	66	17.3
Exhibition-based	52	13.6
Archive-based	21	5.5
Total	**381**	**100.0**

Source: BFI Moving Image Education Providers Database.

Notes:
'Production-based' provision involves learning through making films or animation.
'Exhibition-based' provision involves learning through watching films.
'Mixed' provision involves learning through making and watching films (although not necessarily within the same course or workshop).
'Archive-based' provision involves learning through watching archive films and/or using them in creative activity.

Two thirds (65%) of moving image education providers offer learning opportunities to all age groups (Table 19.12). A sizeable minority (32%) specialise in providing learning opportunities for children and young people.

Table 19.12 Learner age group of moving image education providers, 2012

Type	Number	%
All ages	246	64.6
Children and young people	120	31.5
Adults	15	3.9
Total	**381**	**100.0**

Source: BFI Moving Image Education Providers Database.

Notes:
'All ages' – the provider offers learning opportunities for all ages.
'Children and young people' – the provider specialises in learning opportunities for children and young people (commonly aged up to 19 years, but can include up to 25 years).
'Adults' – the provider specialises in learning opportunities for adults (commonly aged 19+).

Table 19.13 provides a breakdown of the type of provision by learner age group. Production-based activity accounts for 81% of child focused learning activity, 60% of adult opportunities and 55% of opportunities for all ages.

Table 19.13 Type of moving image education provision by learner age group, 2012

	Production-based	Exhibition-based	Archive-based	Mixed	Total
Children and young people	97	11	0	12	120
Adults	9	4	0	2	15
All ages	136	37	21	52	246

Source: BFI Moving Image Education Providers Database.

Finally, Table 19.14 shows the national and regional breakdown of types of moving image education provision. Exhibition-based activity plays a proportionally greater role in Yorkshire (30%), North West (21%) and London (21%). Archive-based activity is a key feature of moving image education provision in Northern Ireland, accounting for 47% of all activity.

Table 19.14 Type of moving image education provision by nation/region, 2012

	Production-based	Exhibition-based	Archive-based	Mixed	Total
East Midlands	26	3	1	5	35
East England	7	1	0	4	12
London	44	14	1	8	67
North East	14	0	0	2	16
North West	16	5	1	2	24
Northern Ireland	6	3	14	7	30
Scotland	32	5	1	5	43
South East	19	2	1	3	25
South West	19	3	0	6	28
Wales	20	3	1	14	38
West Midlands	23	5	0	8	36
Yorkshire and The Humber	16	8	1	2	27

Source: BFI Moving Image Education Providers Database.

- For more information on the film education providers described in this chapter, please see the following links:
  www.21stcenturyliteracy.org.uk
  www.bfi.org.uk
  www.filmclub.org
  www.filmeducation.org
  www.firstlightonline.co.uk
  www.creativeskillset.org
- For the *Teaching Using Film* (2012) report, see www.21stcenturyliteracy.org.uk/findings.php
- For the *Creative Skillset/Research As Evidence Supply Side Mapping Project 2011* see www.creativeskillset.org
- For more information on public investment in film in the UK see Chapter 18 (page 164)

Chapter 20:

Film industry companies

In the UK the majority of film industry companies are in the production and post-production sectors although the largest companies are found in film distribution and exhibition. The US majors are prominent across Europe as are British exhibitors and French production and distribution companies.

Facts in focus:

- In 2011, there were nearly 5,000 film production companies and over 2,200 post-production companies in the UK.
- There were 420 film distributors and 210 exhibitors.
- The majority of companies were small (turnover under £250,000) but more than 73% of turnover was accounted for by the 160 companies with turnover over £5 million.
- 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, North West and Scotland.
- US majors, video distributors and exhibitors were prominent in the top 10 UK film companies in 2010 (the most recent year for which comparable data are available).

20.1 Number of companies in the film industry

The number of companies involved in the film industry has grown significantly in the last 16 years, particularly in the production sector which saw an increase of 371% between 1996 and 2011, compared with the UK average of 51%. (Part of this growth reflects the improvement in coverage in 2008 when companies registered for PAYE but not VAT were added to the totals.) In 2011, there were 8,125 film and video production companies, 465 film and video distributors and 210 exhibitors (Table 20.1).

Table 20.1 Number of companies by industry group, 1996–2011

Year	Film and video production	Film and video distribution	Film exhibition	UK all industries
1996	1,745	355	155	1,380,695
1997	2,460	360	160	1,547,175
1998	3,065	370	160	1,573,935
1999	3,460	380	165	1,595,705
2000	3,900	425	165	1,616,835
2001	4,185	485	190	1,623,025
2002	4,605	515	195	1,619,195
2003	5,065	530	205	1,623,715
2004	5,275	455	200	1,611,535
2005	5,785	445	200	1,631,540
2006	6,210	415	200	1,646,280
2007	6,575	400	200	1,673,835
2008	7,970	435	230	2,161,555
2009	7,965	460	225	2,152,400
2010	8,015	440	225	2,100,370
2011	8,125	465	210	2,080,860
Growth 1996–2011 (%)	**370.8**	**31.0**	**35.5**	**50.7**

Source: Office for National Statistics.

Notes:
From 1996 to 2007, data include only companies registered for VAT.
For 2008–2011, data include in addition companies registered for PAYE but not registered for VAT, so give improved coverage of the company population.
Standard Industrial Classifications (SICs) are used to classify businesses according to the type of their economic activity. The classifications were last revised in 2003 and in 2007. For 1996–2008 data are for 2003 Standard Industrial Classifications (SICs) 9211 (film and video production), 9212 (film and video distribution) and 9213 (film exhibition).
For 2009–2011, film and video production is the sum of 2007 SICs 59111 (film production), 59112 (video production) and 5912 (film, video and TV post-production), film and video distribution is the sum of 59131 (film distribution) and 59132 (video distribution) and film exhibition is 5914 (film exhibition).

The introduction of the 2007 Standard Industrial Classifications makes possible a more detailed breakdown of the sector, as shown in Tables 20.2 and 20.3. This gives a view of film production and distribution separately from video production and distribution, and confirms that film production and distribution make up the majority of the sector. In 2011, film, video and TV post-production activity represented 25.5% of companies and 17.5% of turnover.

Table 20.2 Number of film and video companies by sub-sector, 2011

Sub-sector	Number of companies	% of total
Film production	4,845	54.5
Video production	1,105	12.4
Film, video and TV post-production*	2,265	25.5
Film distribution	420	4.7
Video distribution	45	0.5
Film exhibition	210	2.4
Total	**8,890**	**100.0**

Source: Office for National Statistics.

* Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.
Data as at March 2011.

Although film distributors were only 5% of the companies, in 2011 they accounted for 34.5% of the turnover (Table 20.3). This reflects the dominant position of the UK subsidiaries of the major Hollywood studios in the film value chain.

Table 20.3 Turnover of film and video companies by sub-sector, 2011

Sub-sector	Turnover £ 000	% of total
Film production	2,407,913	29.8
Video production	152,775	1.9
Film, video and TV post-production*	1,416,679	17.5
Film distribution	2,784,818	34.5
Video distribution	130,629	1.6
Film exhibition	1,183,590	14.7
Total	**8,076,404**	**100.0**

Source: Office for National Statistics.

* Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.
Data as at March 2011.

20.2 Size distribution of film companies

The size distribution of film companies is shown in Tables 20.4 to 20.7. While the majority of companies were very small (turnover less than £250,000 per year) over 73% of turnover was accounted for by the 160 companies with turnover greater than £5 million. The concentration was particularly high in film distribution (Table 20.6) where the 25 largest companies accounted for 94% of turnover.

Table 20.4 Size distribution of film production companies, 2011

Turnover size band £ 000	Number	%	Turnover	%
5,000+	80	1.7	1,221,152	50.7
1,000–4,999	330	6.8	648,603	26.9
500–999	205	4.2	136,549	5.7
250–499	360	7.4	120,004	5.0
100–249	1,115	23.0	161,570	6.7
50–99	1,225	25.3	85,607	3.6
0–49	1,530	31.6	34,428	1.4
Total	**4,845**	**100.0**	**2,407,913**	**100.0**

Source: Office for National Statistics.

Data as at March 2011.

Table 20.5 Size distribution of post-production companies, 2011

Turnover size band £ 000	Number	%	Turnover	%
5,000+	45	2.0	c	c
1,000–4,999	110	4.9	224,964	15.9
500–999	100	4.4	c	c
250–499	155	6.8	c	c
100–249	430	19.0	c	c
50–99	655	28.9	c	c
0–49	770	34.0	c	c
Total	**2,265**	**100.0**	**1,416,679**	**100.0**

Source: Office for National Statistics.

Data as at March 2011.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Table 20.6 Size distribution of film distribution companies, 2011

Turnover size band £ 000	Number	%	Turnover	%
5,000+	25	6.0	2,605,472	93.6
1,000–4,999	50	11.9	112,915	4.1
500–999	45	10.7	29,006	1.0
250–499	45	10.7	16,802	0.6
100–249	85	20.2	12,945	0.5
50–99	80	19.0	5,657	0.2
0–49	90	21.4	2,021	0.1
Total	**420**	**100.0**	**2,784,818**	**100.0**

Source: Office for National Statistics.

Data as at March 2011.
Note: Percentages may not sum to 100 due to rounding.

Table 20.7 Size distribution of film exhibition companies, 2011

Turnover size band £ 000	Number	%	Turnover	%
5,000+	10	4.8	c	c
1,000–4,999	35	16.7	70,213	5.9
500–999	30	14.3	c	c
250–499	30	14.3	c	c
100–249	40	19.0	c	c
50–99	40	19.0	c	c
0–49	25	11.9	c	c
Total	**210**	**100.0**	**1,183,590**	**100.0**

Source: Office for National Statistics.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
Data as at March 2011.

20.3 National/regional distribution of film companies in the UK

Tables 20.8 and 20.9 show the national/regional distribution of film companies and film company turnover in 2011. Overall, 69.5% of film companies were concentrated in London and the South East and over 78% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (56% of companies and 97% of turnover) but the exhibition sector was more evenly distributed across the UK, with 71% of companies and 45% of turnover associated with companies based outside London.

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

Table 20.8 National/regional distribution of film companies, 2011

	Film production		Post-production		Film distribution		Film exhibition		Total UK Film	
	Number	%	Number	%	Number	%	Number	%	Number	%
London	2,705	55.8	1,165	51.4	235	56.0	60	28.6	4,165	53.8
South East	710	14.7	405	17.9	75	17.9	25	11.9	1,215	15.7
East of England	305	6.3	150	6.6	30	7.1	25	11.9	510	6.6
South West	270	5.6	150	6.6	15	3.6	15	7.1	450	5.8
North West	165	3.4	95	4.2	15	3.6	15	7.1	290	3.7
Scotland	145	3.0	60	2.6	10	2.4	15	7.1	230	3.0
Yorkshire and The Humber	125	2.6	50	2.2	5	1.2	15	7.1	195	2.5
West Midlands	125	2.6	60	2.6	15	3.6	10	4.8	210	2.7
East Midlands	100	2.1	45	2.0	5	1.2	10	4.8	160	2.1
Wales	95	2.0	40	1.8	5	1.2	10	4.8	150	1.9
North East	55	1.1	25	1.1	5	1.2	0	0.0	85	1.1
Northern Ireland	45	0.9	20	0.9	5	1.2	10	4.8	80	1.0
Total UK	**4,845**	**100.0**	**2,265**	**100.0**	**420**	**100.0**	**210**	**100.0**	**7,740**	**100.0**

Source: Office for National Statistics.

Data as at March 2011, for business enterprises.
Note: Percentages may not sum to 100 due to rounding.

Table 20.9 National/regional distribution of film company turnover, 2011

	Film production		Post-production		Film distribution		Film exhibition		Total UK Film	
	Turnover	%	Turnover	%	Turnover	%	Turnover	%	Turnover	%
London	1,608,613	66.8	1,096,486	77.4	2,693,148	96.7	648,006	54.7	6,046,253	77.6
South West	136,974	5.7	28,660	2.0	9,546	0.3	15,280	1.3	190,460	2.4
East of England	87,873	3.6	32,820	2.3	21,166	0.8	19,702	1.7	161,561	2.1
South East	381,125	15.8	158,987	11.2	40,493	1.5	c	c	–	–
North West	48,261	2.0	55,187	3.9	6,686	0.2	c	c	–	–
Northern Ireland	8,143	0.3	2,679	0.2	c	c	35,002	3.0	–	–
Yorkshire and The Humber	27,690	1.1	c	c	c	c	8,119	0.7	–	–
East Midlands	15,068	0.6	6,614	0.5	c	c	c	c	–	–
West Midlands	20,050	0.8	7,567	0.5	c	c	c	c	–	–
North East	9,885	0.4	4,347	0.3	c	c	c	c	–	–
Wales	27,169	1.1	8,879	0.6	c	c	2,298	0.2	–	–
Scotland	37,062	1.5	c	c	c	c	10,180	0.9	–	–
Total UK	**2,407,913**	**100.0**	**1,416,679**	**100.0**	**2,784,818**	**100.0**	**1,183,590**	**100.0**	**7,793,000**	**100.0**

Source: Office for National Statistics.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
Data as at March 2011, for business enterprises.
Note: 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.

20.4 Leading film companies in the UK and Europe

Table 20.10 shows the top 10 film companies in the UK in 2010 as identified by the European Audiovisual Observatory. The figures clearly show the prominence of the US majors and the relatively high position of companies specialising in video and exhibition. There is only one UK theatrical distributor on the list (Entertainment) and no stand-alone UK film production companies.

Table 20.10 Top 10 film companies in the UK, 2010

Rank	Company	Activities	Operating revenues € 000
1	Walt Disney International	DISFILM, DISTV, RIGHTS, VID	*1,536,000
2	Odeon and UCI Cinemas Group	EXH	761,100
3	Warner Bros Entertainment UK	DISFILM, PRODFILM	435,400
4	Cineworld Group	EXH	402,300
5	VUE Entertainment Investment (UK)	EXH	368,400
6	20th Century Fox Home Entertainment	VID	**245,700
7	2 Entertain Video	VID	212,800
8	Universal Pictures Production	DISFILM, PRODFILM, RIGHTS	205,400
9	Paramount Home Entertainment (UK)	VID	140,600
10	The Entertainment Group of Companies	DISFILM, VID	**120,500

Source: European Audiovisual Observatory, 2011 Yearbook.

* Indicates 2007 revenues.
** Indicates 2009 revenues.
Definitions: DISFILM = film distribution; DISTV = television distribution; EXH = exhibition; PRODFILM = film production; RIGHTS = trade in television rights; VID = video.

The major US companies were prominent across Europe. They were joined by three French companies (Pathé, Les Cinemas Gaumont Pathé and UGC) and three UK-based exhibitors (Odeon/UCI, Cineworld and VUE) (Table 20.11).

Table 20.11 Top 20 film companies in Europe, 2010

Rank	Company	Activities	Country	Operating revenues € 000
1	Walt Disney International	DISFILM, DISTV, RIGHTS, VID	UK	*1,536,000
2	Groupe Pathé	DISFILM, EXH, PRODFILM, RIGHTS, VID, TV	FR	824,000
3	Odeon and UCI Cinemas Group	EXH	UK	761,100
4	Les Cinemas Gaumont Pathé	EXH	FR	640,700
5	Warner Bros Entertainment UK	DISFILM	UK	435,400
6	Warner Bros France	DISFILM	FR	419,800
7	The Walt Disney Company France	DISFILM, DISTV, RIGHTS, VID	FR	413,400
8	Cineworld Group PLC	EXH	UK	402,300
9	RAI Cinema	PRODFILM, RIGHTS	IT	400,700
10	Egmont Nordisk Film	DISFILM, VID	SE	383,000
11	Warner Bros Entertainment GmbH	DISFILM	DE	379,700
12	UGC	DISFILM, EXH, PRODFILM, RIGHTS, VID	FR	**366,000
13	VUE Entertainment Investment	EXH	UK	368,400
14	The Walt Disney Company Italy	DISFILM, DISTV, RIGHTS, VID	IT	354,100
15	Embassy Eagle Holdings	DISFILM, PRODFILM	NL	***335,000
16	Cinema City International NV	EXH	NL	325,800
17	Bavaria Film GmbH	PRODFILM, TV	DE	255,900
18	The Walt Disney Company (Germany) GmbH	DISFILM, DISTV, RIGHTS, VID	DE	247,400
19	20th Century Fox Home Entertainment	VID	UK	***245,700
20	Kinepolis Group	DISFILM, EXH, PRODFILM	BE	239,200

Source: European Audiovisual Observatory, 2011 Yearbook, Table T.16.1.

* Indicates 2007 revenues.
** Indicates 2009 revenues.
*** Indicates 2008 revenues.
Definitions: DISFILM = film distribution; DISTV = television distribution; EXH = exhibition; PRODFILM = film production; RIGHTS = trade in television rights; TV = television; VID = video.

20.5 Leading film production companies in the UK and Europe

Looking at film production only, we see that 10 out of the top 20 European independent production companies in 2010 were French (up from nine in 2009), four Italian, two German and two British. The list was topped by EuropaCorp of France, the maker of *Tell No One* and the Transporter and Taxi films. The UK is under-represented in this table due to the frequent use of special purpose vehicles (companies set up to make a single film) and the US studio connections of a number of the UK's leading production companies.

Table 20.12 Top 20 independent film production companies in Europe, 2010

Rank	Company	Nationality	Operating revenues € 000
1	EuropaCorp	FR	230,700
2	Constantin Film AG	DE	229,200
3	Filmauro	IT	172,400
4	Ingenious Film Partners 2 LLP	UK	111,800
5	Gaumont	FR	101,900
6	Pathé Production	FR	*89,000
7	AB Svensk Filmindustri	SE	78,300
8	Eagle Pictures	IT	68,500
9	Odeon Film AG	DE	64,600
10	MK2 SA	FR	64,300
11	Cattleya	IT	57,400
12	Fandango	IT	56,900
13	Continental Films	FR	55,900
14	UGC YM	FR	*47,200
15	RP Productions	FR	45,500
16	Fidélité Films	FR	**39,500
17	Italian International Film	IT	37,400
18	Pathé Productions	UK	36,300
19	Legende Films	FR	35,100
20	Mandarin Cinema	FR	32,000

Source: European Audiovisual Observatory, 2011 Yearbook, Table 16.3.

* Indicates 2009 revenues.
** Indicates 2008 revenues.

Drawing on the BFI Research and Statistics Unit's production database and public information, Table 20.13 presents the production companies involved in the most productions in the UK over the three-year period 2009 to 2011. Black and Blue Films came top of the list with 11 films with a combined budget of £8 million (equivalent to a mean budget per film of £730,000), followed by Film & Music Entertainment with nine (combined budget of £11 million). At the other end of the budget range, Working Title was involved in six films with a combined budget of £147 million and Legendary Pictures in five films with a combined budget of £747 million.

Table 20.13 Top 20 production companies involved in UK production, ranked by number of films, 2009–2011

Production company	Number of films	Estimated combined budget £ million	Selected titles
Black and Blue Films	11	8	Dead Cert, Devil's Playground, Elfie Hopkins
Film & Music Entertainment	9	11	Children of the Revolution, Mission London, The Mortician
Vertigo Films	7	20	Horrid Henry: The Movie, StreetDance 2 3D, The Sweeney
Working Title Films	6	147	Anna Karenina, Johnny English Reborn, Tinker, Tailor, Soldier, Spy
Matador Pictures	6	13	Eight Minutes Idle, The Dark Half, The Numbers Station
Gateway Films	6	9	Anuvahood, Bonded by Blood, Outside Bet
Warp Films	6	5	Four Lions, Submarine, Tyrannosaur
Passion Pictures	6	4	Everything or Nothing, Fire in Babylon, Project Nim
Legendary Pictures USA	5	747	Clash of the Titans, The Dark Knight Rises, Jack the Giant Killer
Big Talk Productions	5	55	Attack the Block, Paul, Sightseers
CinemaNX	5	9	Ashes, The Disappearance of Alice Creed, TT3D: Closer to the Edge
Press On Features	5	1	Airborne, The Rise and Fall of a White Collar Hooligan
Eros Pictures UK	4	40	Cocktail, Desi Boyz
Number 9 Films	4	30	Byzantium, Great Expectations, Made in Dagenham
Ruby Films	4	20	Chatroom, Tamara Drewe, Jane Eyre
Sixteen Films	4	18	The Angels' Share, Oranges and Sunshine, Route Irish
Ecosse Films	4	14	Love Bite, Nowhere Boy, Wuthering Heights
Embargo Films	4	12	Hysteria, I, Anna, The Sweeney
Unstoppable Entertainment	4	6	4.3.2.1, The Knot, Storage 24
Revolution Films	4	5	Good Vibrations, The Trip, Trishna

Source: BFI.

Notes:
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 four or more films over the three-year period. This cut-off point omits a number of other major production companies behind well-known UK films, including Blueprint Pictures, DNA Films, Ealing Studios, Heyday Films, Marv Films and Scott Free Productions.

- For film production company activity levels in 2011 see Chapter 17 (page 155)
- For US studio involvement in UK film production in 2011 see Chapter 17 (page 155)
- For leading film distributors in the UK in 2011 see Chapter 9 (page 86)
- For leading film exhibitors in the UK in 2011 see Chapter 10 (page 94)
- For numbers and size distribution of film workplaces in 2010 see Chapter 22 (page 198)

*Image: **Hugo** courtesy of Entertainment Film Distributors*

Chapter 21:

The UK film economy

The UK film industry is a valuable sector of the British economy. In 2010, its direct contribution to Gross Domestic Product was £3.3 billion, while exports hit an all time high of £2.1 billion, generating a trade surplus of over £1.5 billion.

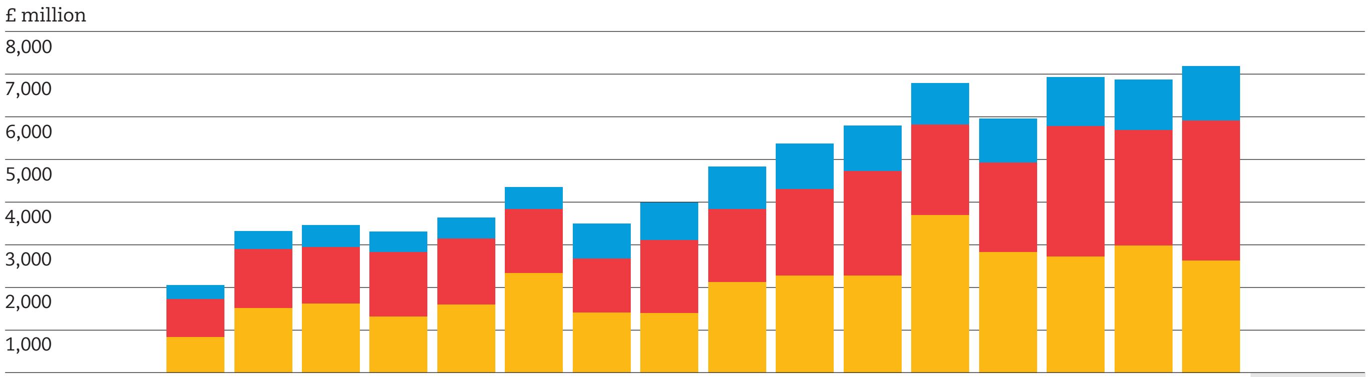
Facts in focus:

- In 2010, the UK film industry had a total turnover of £7.2 billion, which made it, in real terms, nearly two and a half times its size in 1995.
- The UK film industry's direct contribution to UK Gross Domestic Product (GDP) was £3.3 billion, 0.4% of the UK's total and 8.3% of the contribution from all creative industries.
- The industry exported £2.1 billion worth of services in 2010, made up of £1,566 million in royalties and £541 million in film production services.
- Exports in 2010 were 201% higher than in 2001.
- The UK film trade surplus in 2010 was over £1.5 billion

21.1 Film industry turnover, 1995–2010

Figure 21.1 shows the total turnover of the UK's three main film sectors (production, distribution and exhibition) for the period 1995–2010. Each of the three sectors has shown strong growth over this period, with the total industry turnover increasing from £2 billion in 1995 to over £7 billion in 2010.

Figure 21.1 Total turnover of UK film industry by sector, 1995–2010



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	% change 1995–2010
Film and video production	829	1,514	1,612	1,306	1,589	2,334	1,402	1,389	2,119	2,281	2,280	3,693	2,830	2,717	2,976	2,631	217.4
Film and video distribution	895	1,385	1,328	1,521	1,555	1,494	1,271	1,721	1,718	2,030	2,450	2,125	2,105	3,069	2,720	3,280	266.5
Film exhibition	329	420	527	485	485	519	828	871	987	1,065	1,065	976	1,022	1,141	1,176	1,288	291.5
Total	**2,053**	**3,319**	**3,467**	**3,312**	**3,629**	**4,347**	**3,501**	**3,981**	**4,824**	**5,376**	**5,795**	**6,794**	**5,957**	**6,927**	**6,872**	**7,199**	**250.7**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey.

Notes:
'Total turnover' is expressed in current values, ie not adjusted for inflation.
Standard Industrial Classifications (SICs) are used to classify businesses according to the type of their economic activity.
The classifications were last revised in 2003 and in 2007.
For 1995–2007 data are for 2003 SICs 9211 (film and video production), 9212 (film and video distribution) and 9213 (film exhibition).
For 2008, film and video production is the sum of 2007 SICs 59111 (film production), 59112 (video production) and 5912 (film, video and TV post-production), film and video distribution is the sum of 59131 (film distribution) and 59132 (video distribution) and film exhibition is 5914 (film exhibition).
For 2009 and 2010, only film is included in the distribution sector as the data for video distribution are confidential.

The introduction of new categories in the 2007 Standard Industrial Classifications (SICs) makes possible a more detailed breakdown of the industry by sub-sector, as shown in Table 21.1. This gives an official measure of film production and distribution separate from video production and distribution, and confirms that film production and distribution make up the majority of the industry. It also highlights the relative importance of the post-production sector (12% of turnover) which was previously included in the film and video production total.

Table 21.1 Total turnover (£ million) of UK film industry by sub-sector, 2010

Sub-sector	Turnover	% of total
Film production	1,415	19.7
Video production	339	4.7
Film, video and TV post-production	877	12.2
Film distribution	3,280	45.6
Video distribution	c	c
Film exhibition	1,288	17.9
Sector total	**7,199**	**100.0**

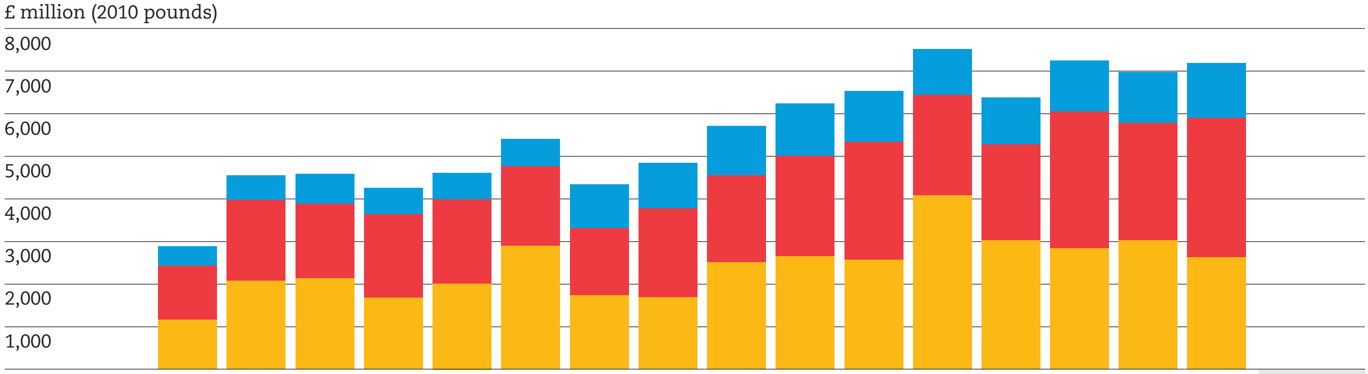
Source: Office for National Statistics Annual Business Survey.

Notes:
Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
Percentages may not sum to 100 due to rounding.

The total industry turnover expressed in real terms, ie with the effects of inflation removed, is shown in Figure 21.2. The real increase has been significant: 125% for film and video production, 159% for film and video distribution and 177% for film exhibition. Overall, in real terms, the industry in 2010 was almost two and a half times its 1995 size.

Figure 21.2 Inflation-adjusted turnover of UK film industry by sector, 1995–2010

£ million (2010 pounds)



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	% change 1995–2010
Film and video production	1,172	2,080	2,136	1,684	2,020	2,908	1,740	1,693	2,516	2,653	2,578	4,093	3,036	2,849	3,029	2,631	124.6
Film and video distribution	1,265	1,903	1,760	1,961	1,977	1,861	1,578	2,097	2,040	2,361	2,770	2,355	2,258	3,218	2,769	3,280	159.3
Film exhibition	465	577	698	625	617	647	1,028	1,061	1,172	1,239	1,204	1,082	1,096	1,196	1,197	1,288	177.0
Total	**2,902**	**4,559**	**4,594**	**4,271**	**4,614**	**5,416**	**4,345**	**4,852**	**5,729**	**6,254**	**6,553**	**7,529**	**6,390**	**7,263**	**6,995**	**7,199**	**148.1**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey, HM Treasury.

Notes:
The deflator used to calculate real values is the UK whole economy deflator.
Values expressed in constant 2010 pounds.
For sector classifications, see notes to Figure 21.1.
For 2009 and 2010, only film is included in the distribution sector as the data for video distribution are confidential.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

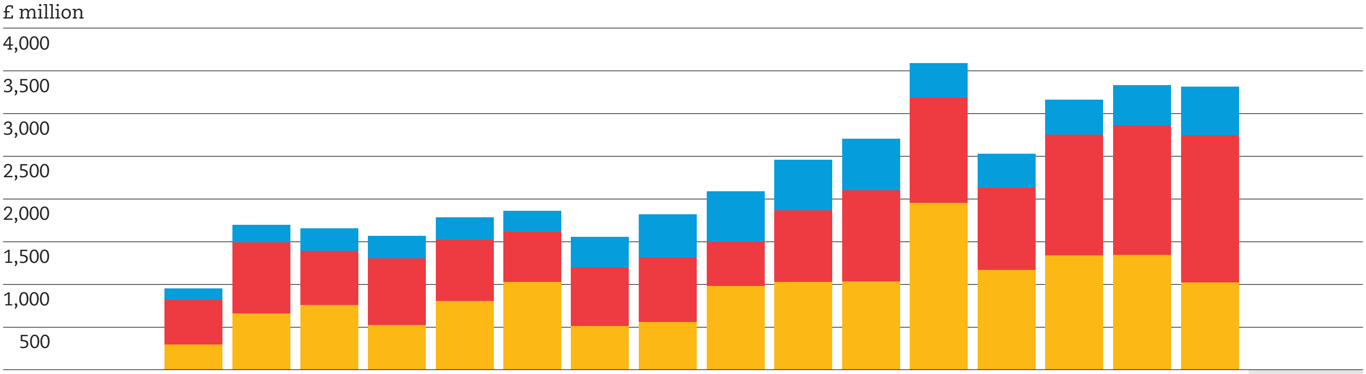
21.2 Film industry contribution to GDP, 1995–2010

The direct contribution an industry makes to UK Gross Domestic Product is measured by its gross value added (GVA). 'Value added' is industry turnover minus the cost of inputs bought from other industries. The main components of value added are wages and salaries, interest and company profits. Value added is therefore a measure of the industry's ability to generate income for its workers, company owners and investors.

The UK film industry's total value added increased from £956 million in 1995 to more than £3.3 billion in 2010 (Figure 21.3). This is 0.4% of the UK's total GDP. All three main sub-sectors showed substantial growth over the period, with exhibition, the smallest sector, showing the largest gain. The Department for Culture, Media and Sport (DCMS) publishes economic data for all creative industries (see link at end of chapter) and in 2009 film, video and photography accounted for 8.3% of the GVA of all creative industries.

In 2010, production accounted for 31% of the industry's value added, distribution 52% and exhibition 17%.

Figure 21.3 UK film industry gross value added, 1995–2010



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	% change 1995–2010
Film and video production	299	663	758	525	805	1,032	514	562	983	1,032	1,035	1,957	1,170	1,342	1,345	1,025	242.8
Film and video distribution	522	829	638	784	716	582	689	760	520	841	1,072	1,232	964	1,411	1,525	1,724	230.3
Film exhibition	135	208	264	260	266	250	354	504	592	592	600	407	403	415	466	571	323.0
Total	**956**	**1,700**	**1,660**	**1,569**	**1,787**	**1,864**	**1,557**	**1,826**	**2,095**	**2,465**	**2,707**	**3,596**	**2,537**	**3,168**	**3,336**	**3,320**	**247.3**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey.

Notes:
'Gross value added' is expressed in actual values, ie not adjusted for inflation.
For 2009 and 2010, only film is included in the distribution sector as the data for video distribution are confidential.

Table 21.2 shows the gross value added breakdown by 2007 SICs. Film accounted for the majority of the sector contribution, with film distribution particularly high at £1.7 billion, 52% of the total.

Table 21.2 UK film industry gross value added (£ million), 2010

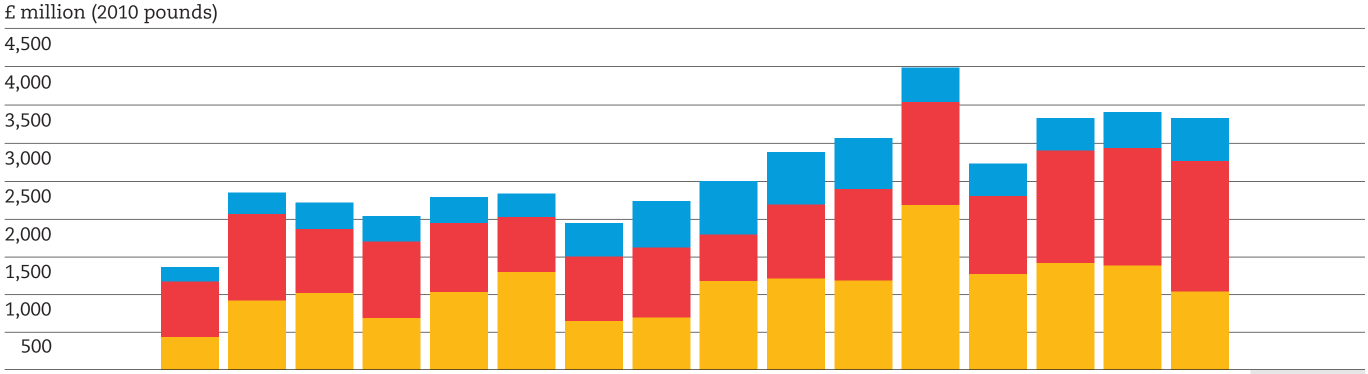
Sub-sector	GVA	% of total
Film production	578	17.4
Video production	94	2.8
Film, video and TV post-production	353	10.6
Film distribution	1,724	51.9
Video distribution	c	c
Film exhibition	571	17.2
Sector total	**3,320**	**100.0**

Source: Office for National Statistics Annual Business Survey.

Note: Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.
'c' indicates the GVA of video distribution is suppressed to avoid disclosing confidential data.

Figure 21.4 shows the industry's value added expressed in real terms, ie with the effects of inflation removed. There was a sharp increase in real industry GVA between 1995 and 1996, followed by a plateau from 1996–2002. Real GVA then began to increase strongly again, reaching a peak of £4 billion in 2006. Real GVA was just over £3.3 billion in 2010, 146% higher than in 1995.

Figure 21.4 UK film industry real gross value added, 1995–2010



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	% change 1995–2010
Film and video production	423	911	1,004	677	1,024	1,286	638	685	1,167	1,200	1,170	2,169	1,255	1,407	1,369	1,025	142.6
Film and video distribution	738	1,139	845	1,011	910	725	855	926	618	978	1,212	1,365	1,034	1,480	1,552	1,724	133.7
Film exhibition	191	286	350	335	338	311	439	614	703	689	678	451	432	435	474	571	199.3
Total	**1,351**	**2,335**	**2,199**	**2,023**	**2,272**	**2,322**	**1,933**	**2,225**	**2,488**	**2,867**	**3,061**	**3,985**	**2,721**	**3,322**	**3,396**	**3,320**	**145.7**

Source: Office for National Statistics Annual Business Inquiry, HM Treasury.

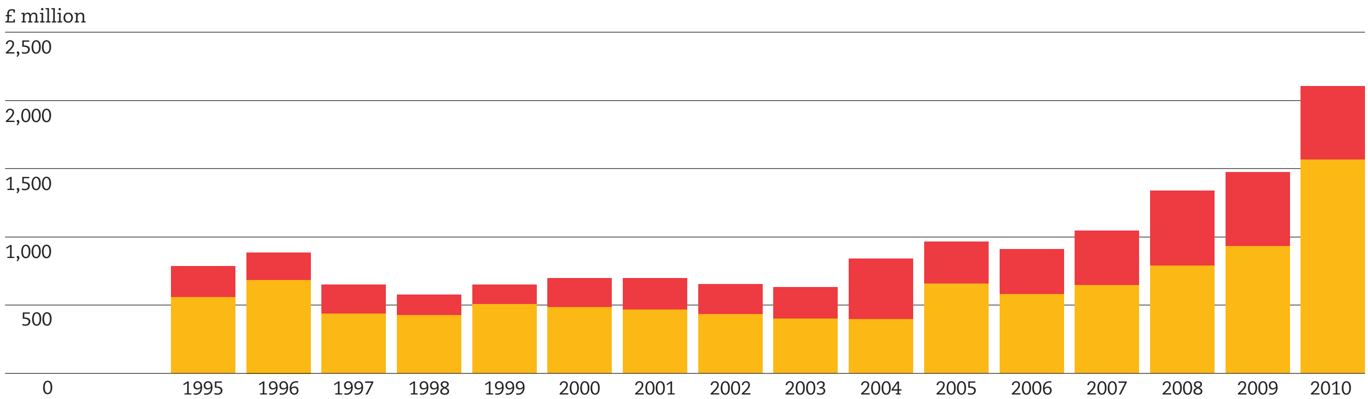
Notes:
The deflator used to calculate real values is the UK whole economy deflator.
Values expressed in constant 2010 pounds.
For 2009 and 2010, only film is included in the distribution sector as the data for video distribution are confidential.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

21.3 Film exports, 1995–2010

The UK film industry exported £2,107 million worth of services in 2010 (the latest year for which data are available), of which £1,566 million came from royalties and £541 million from film production services. Royalties increased by 67% compared with 2009, but the export value of film-related services was the same in 2010 as in 2009. Film exports in 2010 were 201% higher than in 2001 as can be seen in Figure 21.5. DCMS data (see link at end of chapter) show that in 2009 the value of film, video and photography exports accounted for 18.2% of the value of exports for all the creative industries.

Figure 21.5 UK film industry exports, 1995–2010



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Royalties	560	686	438	427	508	487	468	434	400	399	660	582	646	792	935	1,566
Film production services	227	202	212	154	145	210	232	222	233	444	307	330	403	549	541	541
Total film company exports	**787**	**888**	**650**	**581**	**653**	**697**	**700**	**656**	**633**	**843**	**967**	**912**	**1,049**	**1,341**	**1,476**	**2,107**

Source: Office for National Statistics.

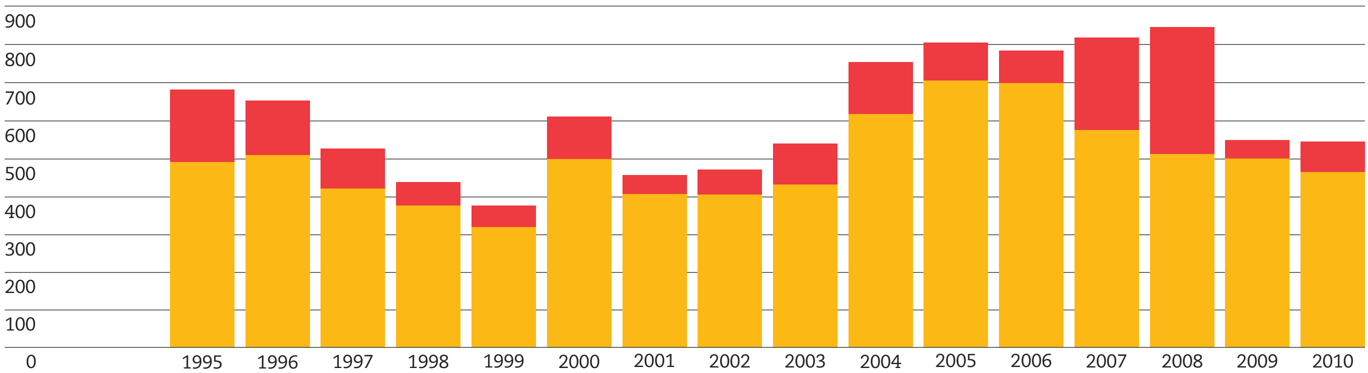
Notes:
Data for 2011 will be available in December 2012.
The export data to 2008 are derived from the Office for National Statistics (ONS) Film and Television Survey which was a sample survey with a high response rate (87%) of companies in the Inter-Departmental Business Register in the Standard Industrial Classification codes relating to film and television.
This survey was discontinued and the 2009 film and television data were collected in the ONS Annual Survey of International Trade in Services.
The above chart shows the results for film companies only.

21.4 Film imports, 1995–2010

Film imports were fairly constant between 2005 and 2008, increasing by only £42 million, which is within the margin of error of the survey, but decreased in 2009 and 2010 compared with the 2005–2008 levels (Figure 21.6). Until 2006, the vast majority of imports were royalties, with film production services accounting for only around 15% of total film imports. In 2007 and 2008, this pattern changed, with the royalties share dropping to 60% and the production services share increasing to 40%. In 2009, total imports decreased by 35% compared with 2008 – the production services share of this total was 9% (compared with 40% in 2008). In 2010 the value of total imports was very similar to the 2009 level and, although the production services share had increased to 15%, it was still much lower than the shares seen in 2007 and 2008.

The reasons for the increase of the production services share in 2007 and 2008 are unclear as the reported level of production imports is high in relation to total UK film production for these years (see Chapter 17). One possible explanation could be the categorisation of the non-UK spend of UK/USA inward investment productions as imports of production services. However, this explanation cannot be confirmed as the survey returns are confidential.

Figure 21.6 UK film industry imports, 1995–2010



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Royalties	489	507	419	374	317	497	405	403	430	616	704	698	573	510	498	463
Film production services	192	145	106	63	58	113	50	67	108	136	100	86	245	336	49	80
Total film company imports	**681**	**652**	**525**	**437**	**375**	**610**	**455**	**470**	**538**	**752**	**804**	**784**	**818**	**846**	**547**	**543**

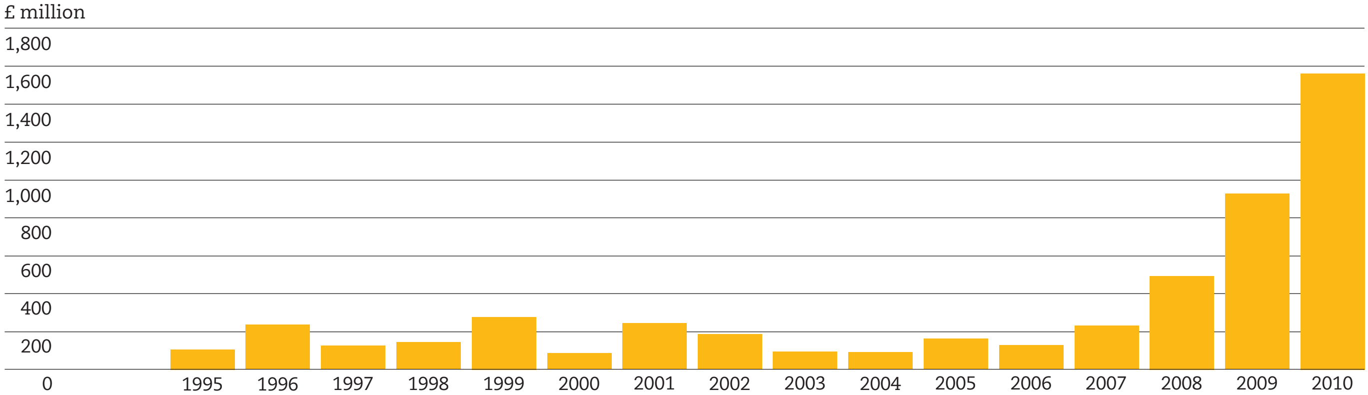
Source: Office for National Statistics.

See notes to Figure 21.5.

21.5 The film trade balance, 1995–2010

The film industry has made a continuous positive contribution to the UK balance of payments since 1995, with a trade surplus (positive balance of exports over imports) of more than £1.5 billion in 2010, as Figure 21.7 shows.

Figure 21.7 Trade surplus of UK film industry, 1995–2010



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Balance	106	236	125	144	278	87	245	186	95	91	163	128	231	495	929	1,564

Source: Office for National Statistics.

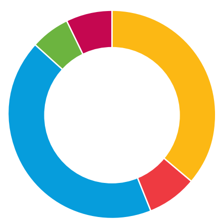
Note: 'Trade surplus' equals exports minus imports. Where a company (eg the UK subsidiary of a US major) receives income from another country on behalf of its parent company and subsequently passes it on to its parent company, this is recorded both as a receipt and a payment, leaving the measure of the trade surplus unaffected.

21.6 Film export markets

Figure 21.8 shows the geographic distribution of UK film exports for the years 2006–2010. The leading export destinations were the USA (43%) and the European Union (36%). Exports to European countries not in the EU accounted for 8% of all exports. Asia took 6% and 'rest of the world' 7% of the total.

Figure 21.8 Destination of UK film exports as percentage of the total, 2006–2010

	%
European Union	36.3
Other Europe	7.7
USA	43.0
Asia	6.1
Rest of the world	7.0



Source: Office for National Statistics.

Note: 'Rest of the world' cannot be disaggregated due to sampling variation and disclosive data.

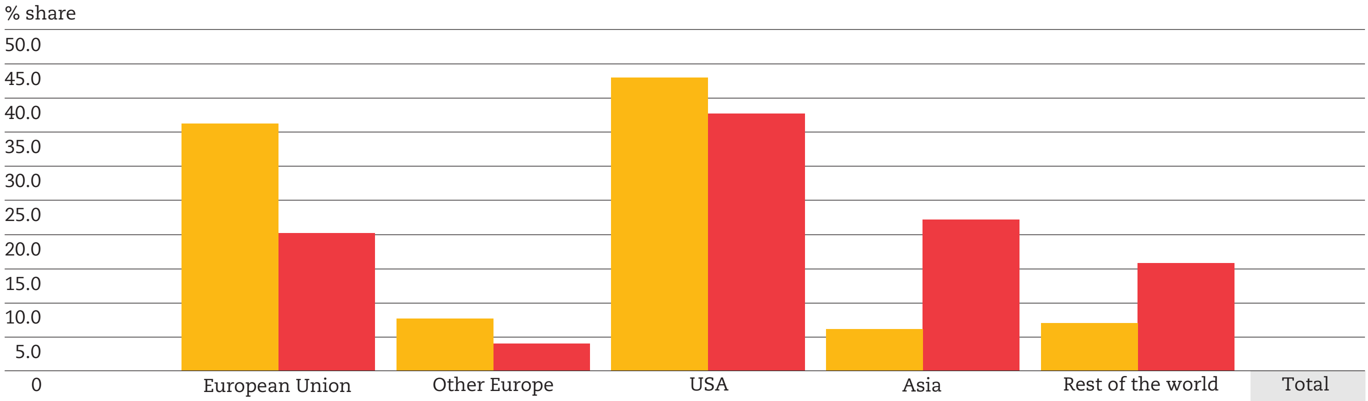
21.7 UK film exports compared with the global market for filmed entertainment

A useful comparison can be made between UK film export shares and the geographical distribution of the global market for filmed entertainment (Figure 21.9). For the EU, USA and 'other Europe' the shares of UK exports are higher than the shares of the ex-UK global filmed entertainment market in each of those regions, whereas the reverse is true in Asia and 'rest of the world'. The differences that stand out are:

- The higher proportion of UK exports to Europe (36% of the UK's film exports are to the EU compared with the EU's 20% share of the ex-UK global filmed entertainment market, and 8% of film exports are to 'other Europe' compared with a 4% ex-UK global market share);
- The lower proportion of UK exports to Asia (6%) compared with the Asian countries' share of the ex-UK global market (22%).

The latter discrepancy reflects the strength of the main Asian countries (China, India, Japan and South Korea) in their own markets, and the consequent lower market shares for Hollywood and UK films.

Figure 21.9 UK export shares, 2006–2010, compared with the ex-UK global market for filmed entertainment, 2011



	European Union	Other Europe	USA	Asia	Rest of the world	Total
% of total film exports	36.3	7.7	43.0	6.1	7.0	100.0
% of total ex-UK global filmed entertainment market	20.2	4.0	37.7	22.2	15.8	100.0

Sources: Office for National Statistics, PricewaterhouseCoopers.

Note: Percentages may not sum to 100 due to rounding.

21.8 The geographical distribution of the UK's film trade surplus

The geographical distribution of the UK's film trade surplus showed a similar pattern to that of exports, except that there was a trade deficit, amounting to 9% of the film trade balance, with 'rest of the world', as shown in Table 21.3. In the years 2006–2010, two fifths of the surplus came from the EU and, in contrast with some earlier years, the UK ran large film trade surpluses with the USA in 2007, 2008 and 2009 which led to the USA accounting for 51% of the UK's film trade surplus in 2006–2010.

Table 21.3 International transactions of the UK film industry by geographical area, annual average, 2006–2010

	Exports £ million	Imports £ million	Balance £ million	% balance
European Union	499.6	229.4	270.2	40.4
Other Europe	105.4	38.8	66.6	9.9
USA	592.0	252.4	339.6	50.7
Asia	83.4	30.0	53.4	8.0
Rest of the world	96.8	157.0	–60.2	–9.0
Total	**1,377.2**	**707.6**	**669.6**	**100.0**

Source: Office for National Statistics.

- For more information on the UK and global film market see Chapter 14 (page 134)
- For more information on the performance of UK films internationally see Chapter 6 (page 56)
- For more information on inward investment in film production in the UK see Chapter 17 (page 155)
- For details of public investment in film see Chapter 18 (page 164)

- For more information on the economy of all creative industries see 'Creative Industries Economic Estimates' on the DCMS website at www.culture.gov.uk/publications/8682.aspx

Chapter 22:

Employment in the film industry

The film industry is a volatile employment sector, with unpredictable peaks and troughs in employment levels. In 2011, total employment levels rose by over 13,000 compared with 2010, with increases in production and exhibition but a slight decrease in distribution.

Facts in focus:

62,000 people worked in the film industry in 2011, of whom 39,000 worked in film and video production. This was an increase on 2010.
Production and distribution were concentrated in London and the South East.
Almost 60% of people working in film and video production were freelance.
Women made up 19% (12% in 2010) of the screenwriters of UK films released in the UK in 2011 and 15% (13% in 2010) of the directors.
Most film industry businesses had low numbers of employees, in particular in film and video production where 95% of workplaces employed 10 or fewer people.

22.1 The workforce

According to the Labour Force Survey (LFS) conducted by the Office for National Statistics (ONS), a total of 62,328 people worked in film and video production and distribution, and film exhibition in the year 2011 (October 2010 – September 2011). The figures include both workers whose main jobs are in these sectors and those with second jobs. They also include full- and part-time workers. Table 22.1 shows the breakdown.

Table 22.1 Film industry workforce, 2011

Sector	Number in employment
Film and video production	39,011
Film and video distribution	6,189
Film exhibition	17,128
Total	**62,328**

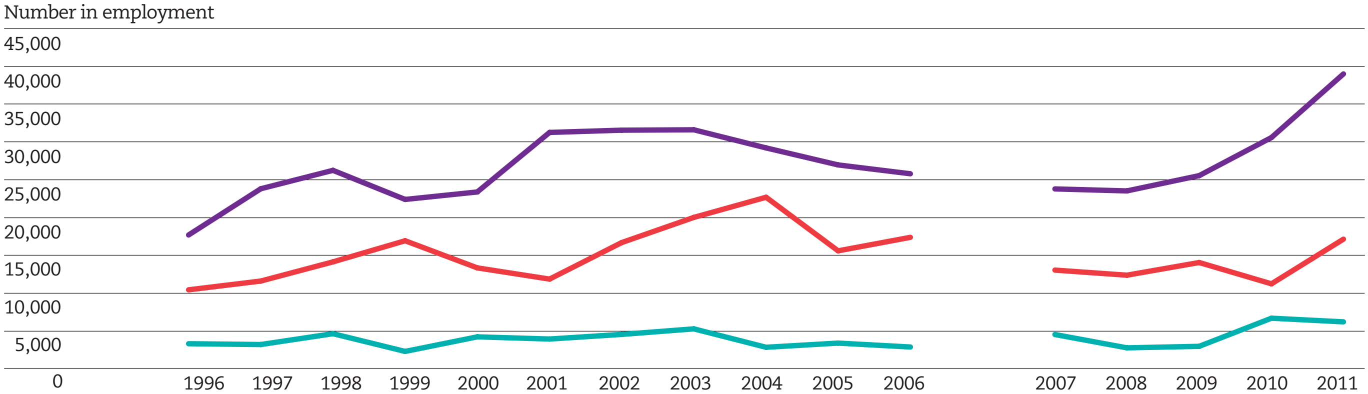
Source: Office for National Statistics Labour Force Survey.

Notes:
Numbers in employment are averages of the four calendar quarters, Oct–Dec 2010, Jan–Mar, Apr–Jun and Jul–Sep 2011.
People in employment include individuals aged 16 or over who undertook paid work (as an employee or self-employed), those who had a job that they were temporarily away from, those on government supported training and employment programmes, and those doing unpaid family work.

Changes to Labour Force Survey estimates
There is an important difference between the estimates relating to the years up to 2006 and those for 2007 onwards. The Standard Industrial Classification (SIC) was updated in 2007; the data to 2006 are based on the old classification while data for 2007 onwards are based on the new classification. For film exhibition the two classifications are directly comparable, but there are differences in production and distribution. The figures for the years up to 2006 include people working in TV production, but the later classification allows TV production to be identified separately, and people working exclusively in this sector are excluded from the later years' data.

As Figure 22.1 shows, employment in film and video production and distribution, and film exhibition generally decreased between 2003 and 2006 but because of the changes to the data explained above, it is difficult to compare the data for the years up to 2006 with the data for 2007 onwards. However, for all three sectors, the LFS estimates indicate a decrease in employment from 2007 to 2008, then an increase in 2009. For production the increase has continued in both 2010 and 2011, with a rise of nearly 9,000 in employment from 2010 to 2011. Employment levels in distribution and exhibition have varied since 2009, with an increase in employment for distribution between 2009 and 2010 followed by a slight fall in 2011, and a decrease in employment between 2009 and 2010 for exhibition, followed by an increase of 6,000 in 2011 compared with 2010.

Figure 22.1 Size of the film workforce, 1996–2011



	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Film and video production	17,705	23,819	26,255	22,407	23,396	31,271	31,565	31,620	29,222	26,974	25,802	23,797	23,535	25,556	30,596	39,011
Film and video distribution	3,296	3,188	4,622	2,277	4,205	3,918	4,527	5,261	2,826	3,379	2,862	4,514	2,752	2,951	6,672	6,189
Film exhibition	10,427	11,585	14,121	16,917	13,328	11,844	16,667	20,004	22,670	15,581	17,368	13,032	12,361	14,036	11,219	17,128

Source: Office for National Statistics Labour Force Survey.

Notes:
The employment figures are averages of the four ‘calendar quarters’ (Oct-Dec, Jan-Mar, Apr-Jun and Jul-Sep), referred to as ‘year to September’.
In 2006, the European Commission required all countries in the European Union to base their labour force surveys on calendar quarters.

Most people working in the distribution and exhibition sectors were employees, but the production sector had a higher proportion of freelance workers. In 2011, 60% of those engaged in film and video production, a total of more than 23,000 people, were self-employed (Table 22.2 and Figure 22.2).

Table 22.2 Film and video production workforce, 1996–2011

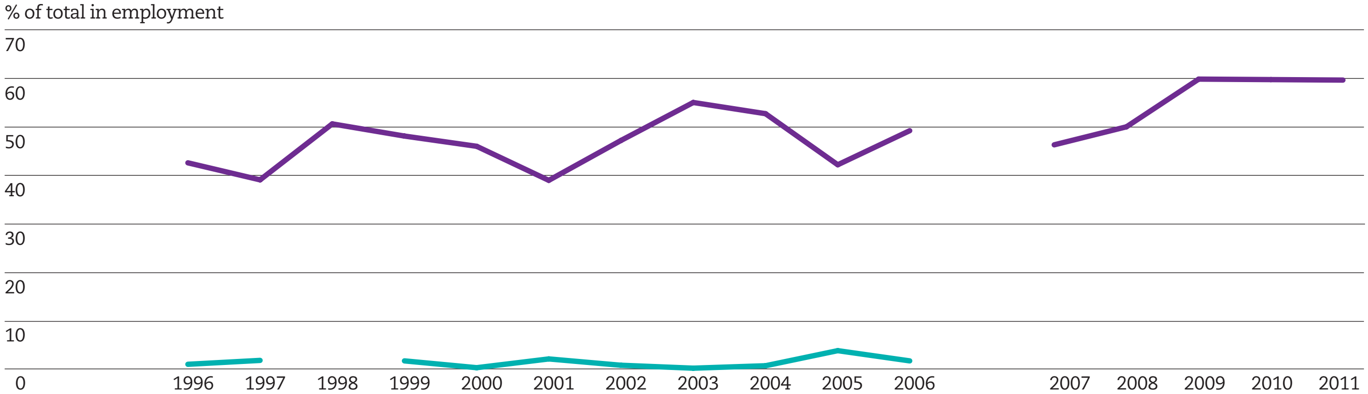
Year	Total in employment	Self-employed	Self-employed as % of total	Unpaid family worker	Unpaid family worker as % of total
1996	17,705	7,539	42.6	215	1.2
1997	23,819	9,313	39.1	488	2.0
1998	26,255	13,276	50.6	–	–
1999	22,407	10,776	48.1	422	1.9
2000	23,396	10,764	46.0	107	0.5
2001	31,271	12,201	39.0	705	2.3
2002	31,565	14,885	47.2	305	1.0
2003	31,620	17,406	55.0	111	0.4
2004	29,222	15,406	52.7	251	0.9
2005	26,974	11,382	42.2	1,076	4.0
2006	25,802	12,687	49.2	502	1.9
2007	23,797	11,026	46.3	–	–
2008	23,535	11,769	50.0	–	–
2009	25,556	15,278	59.8	–	–
2010	30,596	18,258	59.7	–	–
2011	39,011	23,265	59.6	–	–

Source: Office for National Statistics Labour Force Survey.

Notes:
Year means the year ending September. See note to Figure 22.1 for explanation.
An ‘unpaid family worker’ is defined as a person who is doing unpaid work for a business which they own or which a relative owns.

The proportion of self-employed workers has fluctuated mainly in the 40%–50% band between 1996 and 2006. For 2007 onwards, the proportion has been slightly higher on average, reaching 60% in 2009, 2010 and 2011 (though the proportion was as high as 55% in 2003). The figures shown for 2007 onwards are based on the new Standard Industrial Classification, and so the higher average percentages of freelancers in the industry since 2007 could be due to the change in the classification, changes in industry practices, or a combination of both. In comparison, only 15% of the total UK workforce was self-employed in the year to September 2011.

Figure 22.2 Self-employed and unpaid family workers as proportions of total workforce, film and video production, 1996–2011



	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Self-employed as % of total	42.6	39.1	50.6	48.1	46.0	39.0	47.2	55.0	52.7	42.2	49.2	46.3	50.0	59.8	59.7	59.6
Unpaid family worker as % of total	1.2	2.0	–	1.9	0.5	2.3	1.0	0.4	0.9	4.0	1.9	–	–	–	–	–

Source: Office for National Statistics Labour Force Survey.

Notes:
Year means the year ending September. See note to Figure 22.1 for explanation.
Data for unpaid family workers were unavailable for 1998, 2003 and 2007–2011 due to sampling, but numbers were likely to be small.

22.2 Feature film production workforce surveys

In view of the limitations of official labour market data in providing workforce size at sub-sector level, Creative Skillset, the Creative Industries' Sector Skills Council, compiles its own workforce employment statistics for a number of sub-sectors of the creative industries. The Creative Skillset feature film production workforce surveys aim to obtain reliable statistics on working patterns, skills development needs, existing training provision, and perceived barriers to training and development.

Skillset conducted feature film production workforce surveys in 2004 and 2007, the results of which were published in 2005 and 2008. A third survey was carried out in 2010 as part of a wider creative media workforce survey. Here we show the main results on demographics and work patterns for the 2010 survey, along with some results from the first two surveys. However, the comparisons of the 2010 results with earlier results should be considered as indicative only. The survey methodology for the 2010 survey is different from the methodology of the earlier surveys, so direct comparisons of the results are not possible. The approach of the 2010 survey differed significantly from that used in 2004 and 2007 by:

- The inclusion of employees as well as freelance crew;
- A change in scope to include all films regardless of budget (previously only those with a minimum budget of £500,000 were eligible);
- The targeting of anyone who said they had worked in any capacity in the film production sector in the past year, as opposed to anyone specifically on a film production crew list.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Full reports of the surveys are available from the Creative Skillset website (see link at the end of the chapter).

In the 2010 survey, one third of respondents in the film production section were women, with the female percentage varying widely by occupational group, from 59% in strategic management to 6% in audio, sound, music, as Table 22.3 shows. Nearly two fifths of freelancers were women, compared with just over one fifth of employees. Women were over-represented in the London work base (44%) compared with all survey respondents (34%).

Table 22.3 Gender by key employment variables, film production workforce, 2010

	Male %	Female %
Contract type		
Employees	78	22
Freelancers	61	39
Occupational group		
Strategic management	41	59
Creative development	64	36
Production	52	48
Art and design	53	47
Camera	90	10
Audio, sound, music	94	6
Editing	89	11
Business management	50	50
Other	38	62
Work base		
London	56	44
Elsewhere in the UK	68	32
Outside the UK	93	7
Total	**66**	**34**

Source: Creative Skillset Creative Media Workforce Survey 2010.

In 2010, 8% of the film production workforce was from ethnic minorities, compared with just 5% in 2004 and 2007 (Table 22.4). Because of the differences in survey methodology between the 2010 survey and the earlier surveys, described above, the change in the ethnic breakdown of survey respondents between 2007 and 2010 cannot be assumed to indicate a real change in the ethnic breakdown within the film industry from 2007 to 2010. The 2010 result is close to the UK all-sectors average of 9% in 2010. However, there are differences between the film production workforce and the UK all-sectors workforce in the proportions across minority groups. In particular, Asians are under-represented in the film production workforce compared with the UK all-sectors workforce.

Table 22.4 Ethnicity of UK film production workforce, 2004, 2007 and 2010

Ethnic group	Respondents 2004 %	Respondents 2007 %	Respondents 2010 %	All UK workforce %
White	95	95	92	91
Mixed	2	2	3	1
Asian or Asian British	1	1	–	2
Black or black British	1	1	4	5
Chinese	–	–	1	–
Other	1	1	1	1

Source: Creative Skillset Feature Film Production Workforce Surveys 2004 and 2007 and Creative Media Workforce Survey 2010; Office for National Statistics Labour Force Survey, January to December 2010.

Note: Comparison between 2010 findings and previous years is indicative only. Direct comparisons are not possible due to changes in methodology.

The disabled proportion of the film production workforce increased from 3% in 2007 to 6% in 2010 (again this change will be influenced by changes in survey methodology), as shown in Table 22.5, which is the same as the UK average of 6% in 2010.

Table 22.5 Disability, film production workforce, 2004, 2007 and 2010

Workers who consider themselves to have a disability	Respondents 2004 %	Respondents 2007 %	Respondents 2010 %	All in employment in UK aged 16–64 %
Yes	2	3	6	6
No	98	97	94	94

Source: Creative Skillset Feature Film Production Workforce Surveys 2004 and 2007 and Creative Media Workforce Survey 2010; Office for National Statistics Annual Population Survey, January to December 2010.

Note: Comparison between 2010 findings and previous years is indicative only. Direct comparisons are not possible due to changes in methodology.

The age profile of the respondents in 2010 was somewhat more youthful than in the previous surveys. The film production workforce was predominantly young, with 85% aged 49 or under (Table 22.6). The female age profile was significantly younger than the male, with 90% of women being under the age of 49.

More of the respondents in 2010 were between 16 and 24 years (11% compared with 8% in 2007 and 3% in 2004), and more than half the film production workforce was under 35 in 2010 (54% compared with 42% in 2007 and 34% in 2004). People in film production appeared younger than in the wider workforce, with more than two fifths falling into the 25–34 year age band in comparison with just one fifth of the UK workforce as a whole. More than a quarter of the UK workforce is 50 or older, compared with just 15% of the film production workforce.

Table 22.6 Age distribution of film production workforce, 2004, 2007 and 2010

	Respondents 2004			Respondents 2007			Respondents 2010			All UK workforce
Age group	Male %	Female %	All %	Male %	Female %	All %	Male %	Female %	All %	All %
16–24	3	4	3	7	9	8	9	13	11	13
25–34	26	41	31	27	45	34	43	41	43	22
35–49	46	42	45	46	37	42	30	36	32	37
50+	25	13	21	21	10	16	18	10	15	28
All ages	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source: Creative Skillset Feature Film Production Workforce Surveys 2004 and 2007 and Creative Media Workforce Survey 2010; Office for National Statistics Annual Population Survey, January to December 2010.

Notes:
Percentages may not sum to 100 due to rounding.
Comparison between 2010 findings and previous years is indicative only. Direct comparisons are not possible due to changes in methodology.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

As Table 22.7 shows, 57% of respondents were married or living as a couple in 2010, which is the same as in 2007 but lower than the 61% of respondents seen in 2004. The proportion of single respondents has increased in each survey (from 32% in 2004 to 38% in 2007 and then to 40% in 2010).

Table 22.7 Marital status of film production workforce, 2004, 2007 and 2010

Marital status	Respondents 2004 %	Respondents 2007 %	Respondents 2010 %
Married or living as couple	61	57	57
Single and never married	32	38	40
Divorced or separated	7	5	3
Widowed	–	–	1

Source: Creative Skillset Feature Film Production Workforce Surveys 2004 and 2007 and Creative Media Workforce Survey 2010.

Note: Comparison between 2010 findings and previous years is indicative only. Direct comparisons are not possible due to changes in methodology.

The proportion of respondents living with at least one dependent child under 16 years has decreased over the three surveys. In 2010 one quarter of all respondents were living with dependent children, compared with 27% in 2007 and 33% in 2004 (Table 22.8). In all three surveys, the proportion of male respondents living with dependent children was considerably greater than the proportion of female respondents (29% compared with 16% in the latest survey).

Table 22.8 Family status of film production workforce, 2004, 2007 and 2010

	Respondents 2004			Respondents 2007			Respondents 2010		
	Male %	Female %	All %	Male %	Female %	All %	Male %	Female %	All %
Living with dependent child(ren) under 16	39	21	33	40	14	27	29	16	25

Source: Creative Skillset Feature Film Production Workforce Surveys 2004 and 2007 and Creative Media Workforce Survey 2010.

Note: Comparison between 2010 findings and previous years is indicative only. Direct comparisons are not possible due to changes in methodology.

22.3 The gender of writers and directors of UK films

Since 2005, the Research and Statistics Unit has been tracking the under-representation of women among screenwriters of UK films. This has been the subject of two reports: *Scoping Study into the Lack of Women Screenwriters in the UK* (IES, 2006) and *Writing British Films – who writes British films and how they are recruited* (Susan Rogers, Royal Holloway and UK Film Council, 2007). See the web-link at the end of the chapter.

The combined conclusion of these reports is that female under-representation is an aspect of a commissioning process that tends to recruit writers who:

- Are already known to the commissioning producers; and/or
- Are members of the Writers Guild of America; and/or
- Have American agents (even if they are British).

At the time these reports were commissioned, evidence suggested that around 10% of UK films had a female director and around 15% of UK films had a female writer. Of the 159 identified writers of UK films in 2011, 30 (19%) were women (Table 22.9).

Table 22.9 Gender of writers of UK films released in the UK, 2007–2011

	2007	2008	2009	2010	2011
Number of UK titles released in the UK	108	111	113	122	127
Number of writers associated with these titles	169	168	139	144	159
Number of male writers	149	139	116	127	129
Number of female writers	20	29	23	17	30
% male	88.2	82.7	83.5	88.2	81.1
% female	11.8	17.3	16.5	11.8	18.9

Source: BFI.

The proportion of female writers in 2011 was the highest since our monitoring of female writers and directors began in 2007, though the number and percentage of female writers in 2008 were only slightly below the 2011 figures. Some of the female writers associated with UK films released in 2011 were: Jane Goldman (*X-Men: First Class*), Sarah Smith (*Arthur Christmas*) and Lucinda Whiteley (*Horrid Henry: The Movie*). As well as being involved in the writing of films, many of the female writers also directed or co-directed their films.

Table 22.10 shows directors by gender for UK films released in the UK in 2011.

Table 22.10 Gender of directors of UK films released in the UK, 2007–2011

	2007	2008	2009	2010	2011
Number of UK titles released in the UK	108	111	113	122	127
Number of directors associated with these titles	117	113	122	136	140
Number of male directors	110	100	101	119	119
Number of female directors	7	13	21	17	21
% male	94.0	88.5	82.8	87.5	85.0
% female	6.0	11.5	17.2	12.5	15.0

Source: BFI.

The proportion of female directors in 2011 (15%) was the second highest since our monitoring of the gender of directors began in 2007, but the number of female directors was the same (21) as in 2009, which has the highest proportion (17%) since 2007. Some of the female directors associated with UK films released in 2011 were: Andrea Arnold (*Wuthering Heights*), Sangeeta Datta (*Life Goes On*), Lynne Ramsay (*We Need to Talk About Kevin*) and Lone Scherfig (*One Day*). Both Sangeeta Datta and Lynne Ramsay also wrote the screenplays of their films.

22.4 The workplace location

The film production and distribution sectors are concentrated in London and the South East, as shown in Table 22.11. In contrast, the London and South East share of the exhibition sector workforce is lower than the overall UK average.

Table 22.11 London and South East employment as percentage of total, 2011

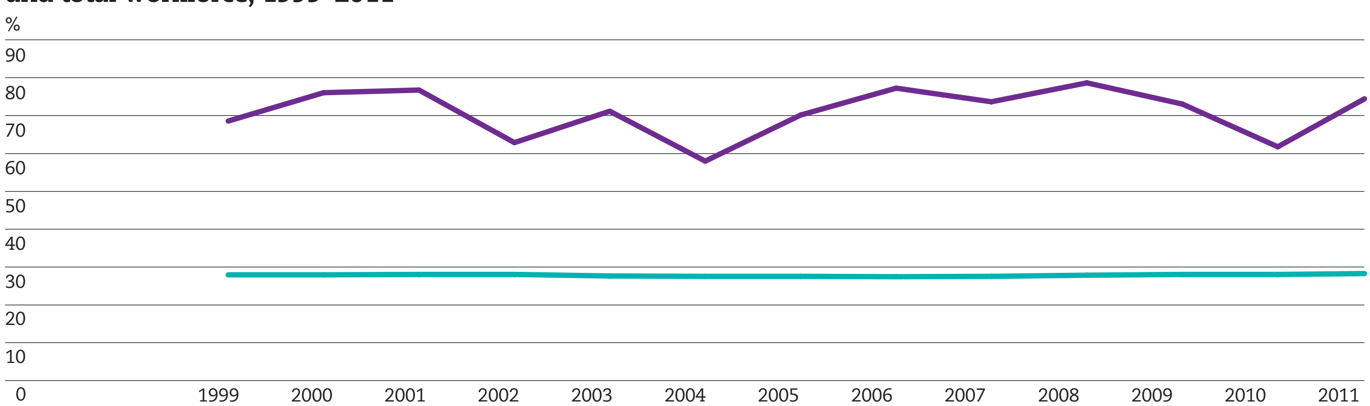
Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	29,994,298	8,513,450	28.4
Film and video production	39,011	29,658	76.0
Film and video distribution	6,189	3,441	55.6
Film exhibition	17,128	2,678	15.6

Source: Office for National Statistics Labour Force Survey.

Notes:
The South East region wraps around London to include the major studios to the west of the city.
Totals shown in this table are averages of the four calendar quarters from October 2010 – September 2011.

The London and South East share of the film and video production workforce was 76% in the year to September 2011 (62% in 2010). Figure 22.3 shows that the share of the film and video production workforce in London and the South East is similar to the levels seen between 2006 and 2009. The LFS estimate of the London and South East share of the distribution workforce is erratic from year to year, mainly due to statistical error arising from the small sample size of the survey at industry sub-sector level.

Figure 22.3 London and South East percentage share of the film and video production and total workforce, 1999–2011



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Film and video production	68.7	76.2	76.9	63.0	71.3	58.1	70.3	77.4	73.8	78.8	73.2	61.9	76.0
UK all industries	28.0	28.0	28.1	28.1	27.7	27.6	27.6	27.5	27.6	27.9	28.1	28.1	28.4

Source: Office for National Statistics Labour Force Survey.

Note: Year means the year to September of the year. See note to Figure 22.1 for explanation.

22.5 The scale of the workplace

Tables 22.12 to 22.14 show the numbers of employees, by size of workplace for film and video production, film and video distribution and film exhibition.

Employment data

The data in tables 22.12 to 22.14 are from the ONS Business Register and differ from the estimates shown in sections 22.1 and 22.4 which are based on the LFS. The LFS counts the number of people employed whereas the Business Register, which is updated from administrative sources and from surveys of employers, includes numbers of jobs. The numbers of jobs and the numbers of people employed are not the same thing, and the data come from different sources, but the numbers arising from them should be similar. However, this is not always the case. The ONS has identified a number of reasons for differences between the estimates, but the two most important ones when looking at particular industry sub-sectors are likely to be sampling error arising from the small LFS sample size at industry sub-sector level and the fact that there are two industry classification processes involved. In the LFS, individuals are classified by industry depending on the industrial information they give, whereas in the Business Register the industry classification is based on companies' activities. As people and companies often work across more than one industry (television and film for example) this gives rise to unpredictable variations between the LFS and the Business Register measures.

In previous Yearbooks these data were from the ONS's Annual Business Inquiry and the Northern Ireland Census of Employment. The Annual Business Inquiry covered only Great Britain, so Great Britain and Northern Ireland data were shown separately. However, the Business Register covers the whole UK, so the tables in the present Yearbook show data for the UK as a whole.

The film and video production sector had a very high number of workplaces with low numbers of employees. More than 95% of workplaces had just 1–10 employees and they accounted for nearly half of the sector's total workforce (48%), as Table 22.12 shows. At the other end of the scale, there were a small number of workplaces with higher numbers of employees. The 55 workplaces with 50 or more employees accounted for 7,500 employees, an average of 138 each.

Table 22.12 Numbers of employees in film and video production by size of workplace for the UK, 2011

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
1–10	6,120	95.3	11,226	47.7
11–49	245	3.8	4,735	20.1
50+	55	0.9	7,591	32.2
Total	**6,420**	**100.0**	**23,552**	**100.0**

Source: Office for National Statistics Business Register.

The distribution sector was not as concentrated in small workplaces as the production sector, with more than 85% of employees based in workplaces with 11 or more employees (Table 22.13) and more than 60% of employees based in workplaces with 50 or more employees.

Table 22.13 Numbers of employees in film and video distribution by size of workplace for the UK, 2011

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
1–10	310	80.5	750	13.7
11–49	65	16.9	1,333	24.3
50+	10	2.6	3,409	62.1
Total	**385**	**100.0**	**5,492**	**100.0**

Source: Office for National Statistics Business Register.

Note: Percentages may not sum to 100 due to rounding.

Table 22.14 shows that the exhibition sector had a concentration that was the reverse of the production sector with 54% of employees in workplaces of 50 or more and only 3% in workplaces in the 1–10 employee band.

Table 22.14 Numbers of employees in film exhibition by size of workplace for the UK, 2011

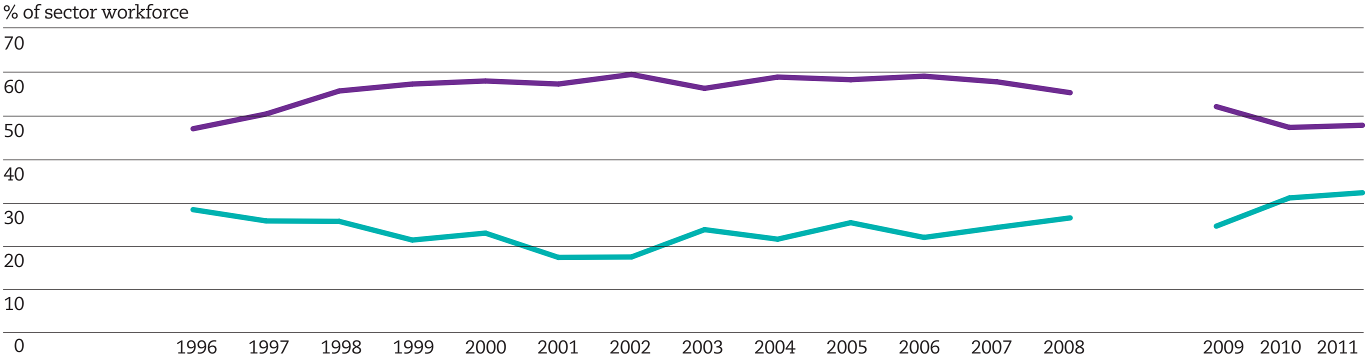
Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
1–10	135	24.3	493	2.6
11–49	275	49.5	8,169	43.5
50+	145	26.1	10,114	53.9
Total	**555**	**100.0**	**18,776**	**100.0**

Source: Office for National Statistics Business Register.

Note: Percentages may not sum to 100 due to rounding.

Figure 22.4 shows the proportion of employees in workplaces with 1–10 employees and the proportion of employees in workplaces with 50 or more employees in the film and video production sector from 1996 to 2011. There is a break in this series as the data from 1996 to 2008 are from ONS Annual Business Inquiry (ABI), and are based on the old industrial classification whereas the 2009–2011 data are from the ONS Business Register and are based on the new industrial classification. The declining trend in the proportion of employment in workplaces with 50 or more employees in the early years shown in the chart has been reversed in recent years, though the increasing numbers in employment in workplaces of this size appears to have slowed between 2010 and 2011. In contrast, the proportion of employment in workplaces with 1–10 employees grew rapidly between 1996 and 2000, then remained at a level of just below 60%, but appears to have declined between 2006 and 2010 and levelled off between 2010 and 2011. For both the percentage of employees in workplaces with 1–10 employees and the percentage in workplaces with 50 or more employees, the trends in the Business Register data are similar to the latest trends in the ABI data.

Figure 22.4 Film and video production employees by workplace size band, percentage of total, 1996–2011



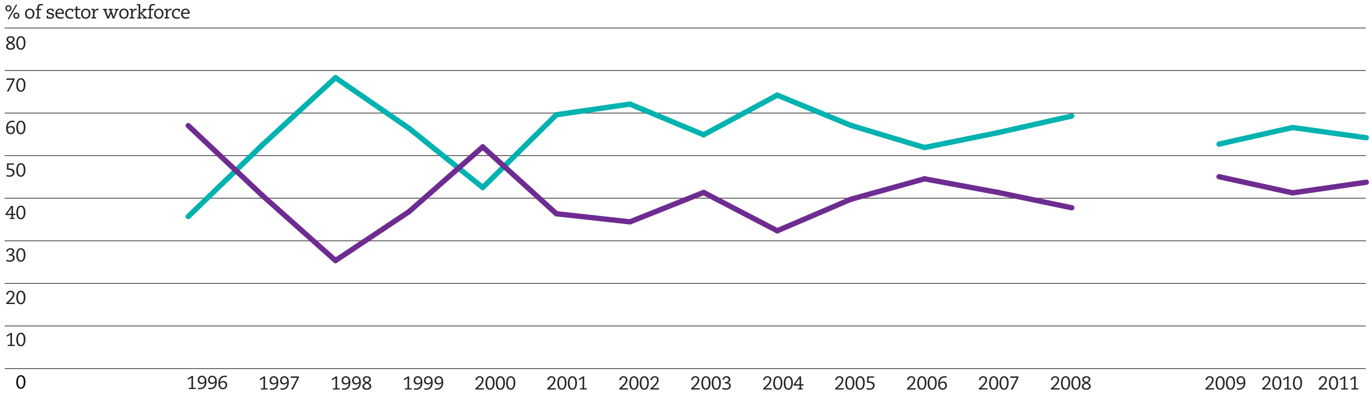
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
1–10 employees	46.9	50.3	55.6	57.2	57.9	57.2	59.4	56.2	58.8	58.2	59.0	57.7	55.2	52.0	47.2	47.7
50+ employees	28.3	25.7	25.6	21.3	22.9	17.3	17.4	23.7	21.5	25.3	21.9	24.2	26.4	24.5	31.0	32.2

Source: Office for National Statistics Annual Business Inquiry and Business Register.

Notes:
The 1996 to 2008 figures cover England, Scotland and Wales only; 2009 to 2011 refer to UK.
Workforce data from 1996 and 1997 were re-scaled to be comparable to the latest series of ABI.

In the exhibition sector the proportion of employees in the 50+ category increased from 2006 to 2008, after decreasing in 2004 to 2006. The reverse is happening in the 11–49 size band where the proportion of employees appeared to decline between 2006 and 2008 after seeing an increase between 2004 and 2006, as shown in Figure 22.5. As with Figure 22.4 the data for 2009 to 2011 are from the ONS Business Register and are based on the latest industrial classification, while the data from 1996 to 2008 are from the ABI and are based on the old industrial classification. The Business Register data show an increase in the proportion of employees employed in large workplaces between 2009 and 2010 with a corresponding decrease in the proportion of employees employed in medium sized workplaces in the same period, but these trends reversed between 2010 and 2011.

Figure 22.5 Film exhibition employees by workplace size band, percentage of total, 1996–2011



	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
11–49 employees	56.8	40.5	25.1	36.6	51.8	36.1	34.2	41.1	32.1	39.5	44.3	41.1	37.5	44.8	41.0	43.5
50+ employees	35.4	52.1	68.0	56.1	42.2	59.3	61.8	54.6	63.9	56.8	51.6	55.1	59.0	52.4	56.3	53.9

Source: Office for National Statistics Annual Business Inquiry and Business Register.

Notes:
The figures for 1996 to 2008 cover England, Scotland and Wales only; 2009 to 2011 refer to UK.
Workforce data from 1995 to 1997 were re-scaled to be comparable to the latest series of ABI.

- For the reports on the representation of women among screenwriters of UK films, *Scoping Study into the Lack of Women Screenwriters in the UK* and *Writing British Films – who writes British films and how they are recruited*, see industry.bfi.org.uk/diversitystats
- For more information about differences between LFS estimates of numbers of people in employment and employers' surveys estimates of numbers of jobs, see the National Statistics Quality Review Series Report no. 44: *Review of Employment and Jobs Statistics*, at www.ons.gov.uk/about-statistics/methodology-and-quality/quality/nat-stats-qual-revs/qual-revs-by-theme/labour-market/index.html
- For more information on film distribution, see Chapter 9 (page 86)
- For details of the exhibition sector, see Chapter 10 (page 94)
- For more background on film production, see Chapter 17 (page 155)
- Creative Skillset website: www.creativeskillset.org/research/

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Glossary

Alternative content
Non-feature film programming in cinemas, such as the live screening of events happening elsewhere. Such content has become a regular feature of some UK cinemas in recent years, and has been made possible by the availability of digital projection

Asian programming
Films originating from South Asia, for example Bollywood, and generally, though not exclusively, aimed at a South Asian audience and in a South Asian language

BAFTA
British Academy of Film and Television Arts (www.bafta.org)

BARB
Broadcasters' Audience Research Board. The company that compiles audience figures for UK television (www.barb.co.uk)

BBFC
British Board of Film Classification. Independent body responsible for classifying films and video (see Film classification) (www.bbfc.org.uk)

Blu-ray disc (BD)
An optical disc format that can store up to 50 Gb of data, almost six times the capacity of a dual layer DVD. It uses a short wavelength blue-violet laser to read and write information to disc

Box office
Total value of ticket sales for a film screened commercially at cinemas

Box office gross
Box office takings before deduction of Value Added Tax (VAT)

BVA
British Video Association. The trade body representing the interests of publishers and rights owners of pre-recorded home entertainment on video (www.bva.org.uk)

CAA
Cinema Advertising Association. The trade association of cinema advertising contractors operating in the UK and Republic of Ireland

Cinema film classification
Classification given to a film by the British Board of Film Classification for release in cinemas. Indicates the film's suitability for audiences according to their age

Community cinema
Voluntary providers of films bringing a variety of programming, often non-mainstream, to local communities which may be underserved by the commercial operators

Concession revenue
Revenue from sales of food, drink and merchandise at cinemas

Co-production
A film made by companies from more than one country, often under the terms of a bilateral co-production treaty or the European Convention on Cinematographic Co-production

Country of origin
The nationality of a film. In the case of co-productions, this may include more than one country

DCMS
Department for Culture, Media and Sport. Government department responsible for setting UK film culture and industry policy and administering the National Lottery Distribution Fund (www.culture.gov.uk)

Digital Cinema Initiatives
Digital Cinema Initiatives, LLC (DCI) was created in March 2002 and is a joint venture of Disney, Fox, Paramount, Sony Pictures Entertainment, Universal and Warner Bros Studios. Its primary purpose is to establish and document voluntary specifications for an open architecture for digital cinema that ensures a uniform and high level of technical performance, reliability and quality control (www.dcimovies.com)

DLP Cinema
The trademark of Texas Instruments' digital projection system. DLP stands for 'digital light processing'

Digital projection
The projection of a film onto a cinema screen using a digital master and a digital projector, ie using electronic signals to direct light onto the screen rather than passing light through a celluloid strip

Digital terrestrial television (DTT)
Multi-channel television delivered free to the consumer by means of a signal decoder between the aerial and the television set

Distributor
A person or company that acquires the right to exploit the commercial and creative values of a film in the theatrical, video and television market. Also undertakes the promotional and marketing activities to attract audiences to the film

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

Download
See 'Film download'

Download to Own (DTO)
The purchase of permanent film downloads for storage on a hard drive, and in some cases to burn an additional copy to DVD. Also known as Electronic-sell-through (EST)

Download to Rent (DTR)
A type of Video on Demand model which allows users to download content to view within a limited time period (often up to 48 hours following the first play)

DVD
Digital versatile disc

Electronic-sell-through (EST)
See Download to Own (DTO)

English Regions
Formerly known as Government Office Regions (GORs) they were an administrative regional classification used to establish the boundaries of the Regional Development Agencies and the Regional Screen Agencies. In 2011 the administrative function of GORs was abolished but the areas were kept for statistical purposes and are now known just as 'Regions'

Exhibitor
A cinema operator that rents a film from a distributor to show to a cinema audience

Feature film
A film made for cinema release, as opposed to a film made for television, and usually of at least 80 minutes duration

Film download
A digital version of a film transferred (either officially or unofficially) from the internet to a personal computer or mobile device. Downloads may also go directly to television sets via games consoles, internet protocol television or dedicated set-top boxes

Film rental
The sum of money paid to the distributor by the exhibitor in return for the right to show a particular film. Usually calculated as a percentage of net box office

Franchise
A film series such as *Harry Potter and the Philosopher's Stone* and its sequels

GCE – General Certificate of Education
An academic qualification comprising Advanced Level (A Level) and Advanced Subsidiary Level (AS Level)

GCSE – General Certificate of Secondary Education
An academic qualification awarded in a specific subject, generally taken by students aged 14–16 in secondary education in England, Wales and Northern Ireland (Scottish equivalent is the Standard Grade)

GDP – Gross Domestic Product
A measure of a country's income and output. GDP is defined as the total market value of all final goods and services produced within the country in a given period of time. GDP is also the sum of the value added at each stage of the production process. 'Gross' refers to the fact that GDP includes capital investment but does not subtract depreciation

Grant-in-aid
A payment by a public sector funder (normally a central government department) to finance all or part of the costs of the body in receipt of the grant-in-aid. Grant-in-aid is paid where the Government has decided, subject to parliamentary controls, that the recipient body should operate at arm's length

GVA – Gross Value Added
The amount that individual businesses, industries or sectors contribute to the economy. Broadly, this is measured by the income generated by the business, industry or sector less their intermediate consumption of goods and services used up in order to produce their output. GVA consists of labour costs (for example, wages and salaries) and an operating surplus (or loss). The latter is a good approximation to profits. The cost of capital investment, financial charges and dividends to shareholders are met from the operating surplus

Genre
A style or category of film defined on the basis of common story and cinematic conventions (eg action, crime, drama, romantic comedy, etc)

HD-DVD
High-definition digital versatile disc. A high-density optical disc format designed for the storage of data and high-definition video. Abandoned in February 2008 after Blu-ray prevailed in the competition to become the next generation DVD format

Higher (Scottish)
In Scotland, the Higher is one of the national school-leaving certificate exams and university entrance qualifications of the Scottish Qualifications Certificate offered by the Scottish Qualifications Authority

HMRC
Her Majesty's Revenue and Customs.
The government department charged with collecting revenue on behalf of the Crown

HMT
Her Majesty's Treasury. The government department responsible for formulating and implementing the Government's financial and economic policy

Independent film
A film produced without creative or financial input from the major US studio companies. These are: Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Inward features
A term used by the BFI Research and Statistics Unit to denote a film which is substantially financed and controlled from outside the UK and which is attracted to the UK by script requirements (eg locations) and/or the UK's filmmaking infrastructure and/or UK tax relief

Internet Protocol Television (IPTV)
Television connected to the internet that uses internet digital protocols to communicate data

ISBA TV Regions
System for classifying regions developed by the Incorporated Society of British Advertisers for use by the advertising industry

Mainstream programming
Category of films aimed at the general audience

Mean
A statistical term for the average of a set of values, which is calculated by summing the values and then dividing by the count of the values

MEDIA Programme
The European Union's support programme for the audiovisual industries. From 2007–2013 it has a budget of €755 million

Median
A statistical term meaning the middle value in an ordered set of values. Half of the values fall below the median, and half of the values fall above the median

Megaplex site
Defined by Dodona Research as a purpose-built cinema with 20 or more screens

Multiplex site
Defined by Dodona Research as a purpose-built cinema with five or more screens

Multi-channel television
Digital television programming carried by satellite, cable or freeview delivery systems, in this case excluding the five main network channels (BBC One, BBC Two, ITV1, Channel 4 and Channel 5)

Near-Video on Demand (nVoD)
A pay-per-view system which allows television viewers to purchase individual films to view.
The film is shown at the same time to everyone ordering it, as opposed to true-Video on Demand, which allows the viewers to see the film at any time. Films can be purchased via an on-screen guide, automated telephone or customer services line

Net box office
Box office takings after deduction of VAT

Online DVD rental
Selecting and renting DVDs via a website for postal delivery

ONS
Office for National Statistics. Executive office of the UK Statistics Authority, responsible for the production of official statistics in the UK (www.ons.gov.uk)

Out of town cinema
Cinema located on the outskirts of a town, typically in a large shopping development

PAYE
Pay As You Earn. A method of collecting income tax and national insurance where these are deducted at source by the employer and remitted to HMRC

Pay-per-view
See near-Video on Demand

Pay-TV
A satellite or cable television system in which viewers pay a subscription to access television content

Personal computer (PC)
A lap-top or desk-top computer capable of operating independently of a network (although frequently networked in office environments)

Personal video recorder (PVR)
A digital set-top box with hard drive capable of storing large amounts of audiovisual content

Physical media
Refers to the various physical formats on which video can be distributed, such as VHS, DVD, Blu-ray, etc

PlayStation Portable (PSP)
A portable games console made by Sony that can be used to view VoD content

Post-production
All stages of film production occurring after filming. These typically include: editing the picture, adding the soundtrack, adding visual special effects and sound effects and preparing release prints

Principal photography
The phase of film production in which the movie is filmed, with actors on set and cameras rolling, as distinct from pre-production and post-production

Producer
A film producer oversees and delivers a film project to all relevant parties while preserving the integrity, voice and vision of the film

Standard Industrial Classification (SIC)
A system used by the Office for National Statistics to classify businesses according to the type of their economic activity

Sites
Individual cinema premises

Socio-economic group
Section of the population defined by employment status

Specialised programming
Generally, non-mainstream films. This category includes foreign language and subtitled films, feature documentaries, arthouse productions and films aimed at niche audiences

Streaming
The transmission of audiovisual content that is constantly received by and presented to a user at the same time as it is being delivered by the provider. The client media player can start playing the data before the entire file has been transmitted

Subscription VoD (SVoD)
A VoD business model based on a subscription payment (usually monthly) in return for unlimited access to content

Terrestrial television
The five main free-to-air channels: BBC One, BBC Two, ITV1, Channel 4 and Channel Five

Traditional cinema
A cinema generally with fewer than five screens and that shows more mainstream product. Often an older building located in city centres or suburbs

Turnover
The revenue that a company receives from its normal business activities during a period of time, usually from the sale of goods and services to customers

UK and Republic of Ireland
The distribution territory comprising the UK and Republic of Ireland. Where this publication indicates a film has been released 'in the UK and Republic of Ireland' it refers to the distribution territory and not necessarily to an actual release in both countries

UK film
A film which is certified as such by the UK Secretary of State for Culture, Olympics, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production; a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent; or (in the case of a re-release) a film which met the official definition of a British film prevailing at the time it was made or was generally considered to be British at that time

UMD
Universal media disc. An optical disc medium developed by Sony for use on the PlayStation Portable

VFX
Visual effects. The various processes by which imagery is created and/or manipulated outside of live action material

VHS
Video home system. Standard format for cassette tapes containing recorded films and other audiovisual content

Video on Demand (VoD)
A pay-per-view system that allows users to select and watch films on a television set, PC or mobile device at the time they want over an interactive network. The user can buy or rent films and download them before viewing starts or stream content to be viewed in real time

Video on physical media
See 'physical media'

Virtual Print Fee (VPF)
The commercial joint funding model designed to help film exhibitors purchase digital cinema equipment. The VPF is a contribution towards exhibitors' costs of digital cinema equipment, paid by distributors. This is based on the assumption that distributors will benefit from cost savings associated with using digital print distribution instead of analogue film print distribution

Acknowledgements

We would like to thank the following organisations for their various contributions to this Yearbook:

Attentional

Beacon Dodsworth

British Board of Film Classification (BBFC)

British Federation of Film Societies (BFFS)

British Video Association (BVA)

Broadcasters' Audience Research Board (BARB)

Cinema Advertising Association (CAA)

Creative Skillset

Department for Culture, Media and Sport (DCMS)

Department for Education

Dodona Research

European Audiovisual Observatory (EAO)

European Film Agency Research Network (EFARN)

FILMCLUB

Film Education

First Light

Harris Interactive

Higher Education Statistics Agency (HESA)

Her Majesty's Revenue and Customs (HMRC)

Her Majesty's Treasury (HMT)

IHS *Screen Digest*

Ipsos Mori

Joint Council for Qualifications (JCQ)

Kantar Worldpanel

Motion Picture Association of America (MPAA)

Nielsen Media Research (NMR)

Northern Alliance

Office for National Statistics (ONS)

Official Charts Company (OCC)

PricewaterhouseCoopers (PwC)

Rentrak

Scottish Qualifications Authority (SQA)

WJEC

Sources

Chapters 1 to 10: Box office, top films, genre and classification, specialised films, UK films internationally, UK talent and awards, release history of UK films, distribution and exhibition.

- Rentrak, weekly UK and international box office reports
- BFI cinema attendance statistics
- Ipsos Mori *3D Movies at the Cinema*
- Motion Picture Association of America, theatrical market statistics
- European Audiovisual Observatory Lumière database
- HM Treasury, GDP deflators
- Dodona Research, *Cinemagoing* 21 April 2012
- IHS *Screen Digest, Cinema Intelligence*
- British Board of Film Classification (BBFC), database of film classifications
- Nielsen Media Research, monthly media spend reports
- Department for Culture, Media and Sport, British film certification data
- BFI Film Certification Unit, British film certification data
- Rentrak, *International Box Office Essentials* database
- Beacon Dodsworth, UK population data by ISBA TV region
- Cinema Advertising Association, cinema admissions by ISBA TV region
- Office for National Statistics, UK population data by nation and English region
- BFI Lottery Distribution and Exhibition Department
- British Federation of Film Societies, *Cinema for All survey results*

Chapters 11 to 15: Film on video, VoD and television, the film market as a whole and audiences.

Sources from previous chapters, plus:

- British Video Association, *BVA Yearbook 2012*
- Official Charts Company, video charts
- Kantar Worldpanel
- Broadcasters' Audience Research Board, *Television Audience Measurement Service*
- Attentional, database of film on UK television, 2011
- IHS *Screen Digest, Global Media Intelligence* (monthly), *Online Movie Strategies* (report), *TV Intelligence*, *Video Intelligence* and *Broadband Media Intelligence*
- PricewaterhouseCoopers, *Global entertainment and media outlook 2012–2016*, June 2012
- Office for National Statistics *UK recreational and cultural services price index*
- Cinema Advertising Association, *2011 Film Monitor and FAME: Film Audience Measurement and Evaluation* report, 2012
- National Readership Survey (NRS)
- *Opening our eyes: How film contributes to the culture of the UK*, a report for the BFI by Northern Alliance and Ipsos MediaCT, July 2011
- *Portrayal vs. Betrayal*, UK Film Council and Harris Interactive, April 2011

Chapters 16 to 22: British film certification, film production, public investment in film in the UK, film education, film companies, the UK film economy and employment.

Sources from previous chapters, plus:

- BFI Research and Statistics Unit production tracking
- National and Regional Screen Agencies
- Creative Skillset
- HESA Student Record 2002/03 – 2010/11, Higher Education Statistics Agency
- Joint Council for Qualifications (JCQ), National Results 2002–2011
- Scottish Qualifications Authority, Pre-Appeals Data 2002–2011
- WJEC
- Film Education

- BFI, education event statistics
- 21st Century Literacy
- Mediabox
- Department for Education
- FILMCLUB
- First Light
- BFI Moving Image Education Providers Database
- European Audiovisual Observatory, *2011 Yearbook, Volume 3*
- HM Revenue and Customs (HMRC), *Film Tax Relief Summary of Tax Credit Claims: 2006/07 to 2010/11*
- DCMS Creative Industries Economic Estimates
- Creative Skillset Film Production Workforce Surveys 2004 and 2007
- Creative Skillset Creative Media Workforce Survey 2010
- Office for National Statistics, *Annual Business Inquiry*, 2009
- Office for National Statistics, *Annual Business Survey*, 2011
- Office for National Statistics, *Size Analysis of UK Businesses (VAT and PAYE data)*, 2010
- Office for National Statistics, *International transactions of the UK film and television industries* 2008, 9 December 2009
- Office for National Statistics, *International Trade in Services 2010*, 27 March 2012
- Office for National Statistics, *Labour Force Survey*, Quarterly to September 2011
- Office for National Statistics, *Business Register*

Editorial management: John Murray
Designed by Radley Yeldar

BFI activities include:

- Supporting filmmakers, and the industry more widely, through Lottery grants from the Film Fund
- Supporting film education at all levels
- The BFI London Film Festival, the BFI London Lesbian and Gay Film Festival, and the BFI Future Film Festival
- BFI distribution (including UK-wide cinema releases, DVD and online)
- BFI publishing, including Sight & Sound magazine
- Providing research and statistics
- Certifying British films eligible for tax relief
- MEDIA Desk UK, facilitating access for film companies to EU funding
- The BFI Library
- The BFI National Archive.

Discover more at **bfi.org.uk**

dcms
department for culture, media and sport

Awarding funds from The National Lottery®

Film
Forever

21 Stephen Street, London, W1T 1LN
bfi.org.uk