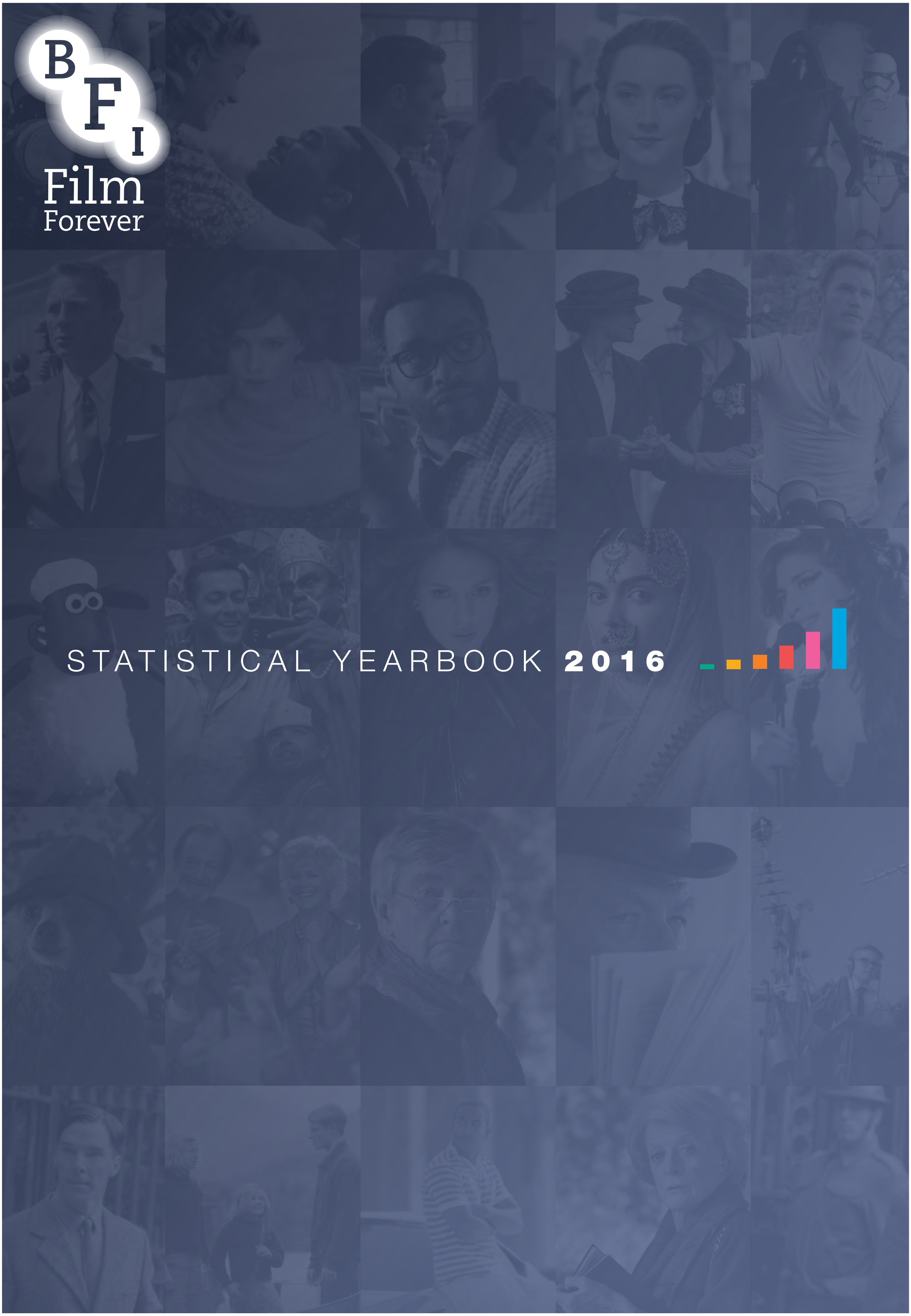

BFI

Film Forever

STATISTICAL YEARBOOK 2016

Welcome to the 2016 BFI Statistical Yearbook. Compiled by the Research and Statistics Unit, this Yearbook presents the most comprehensive picture of film in the UK and the performance of British films aboard during 2015. This publication is one of the ways the BFI delivers on its commitment to evidence-based policy for film. We hope you enjoy this Yearbook and find it useful.

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, distribution, cultural programming, 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 Josh Berger.

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CHAPTER 1

THE BOX OFFICE 2015

Image: *SPECTRE*

THE BOX OFFICE 2015

UK box office revenues for 2015 exceeded £1.2 billion, the highest total ever recorded, while annual admissions reached 171.9 million, the third highest total of the past decade.

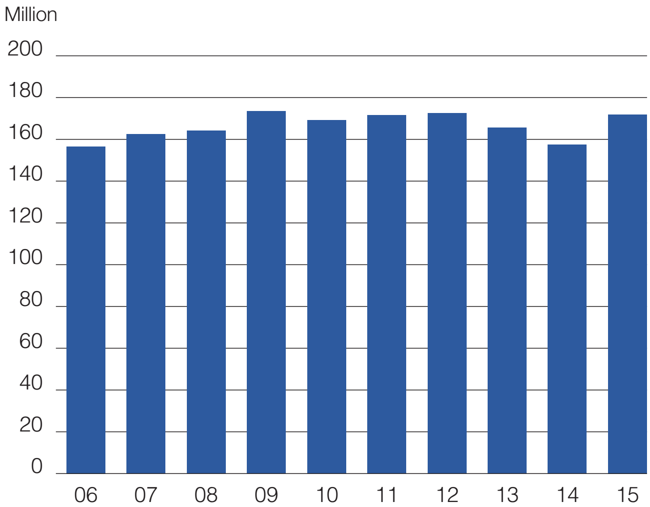
FACTS IN FOCUS

- UK box office receipts in 2015 were £1,236 million, up 17% on 2014.
- UK cinema admissions reached 171.9 million, up 9% on 2014.
- A total of 759 films were released in the UK and Republic of Ireland.
- UK films, including co-productions, accounted for 28% of releases and around 45% of the market by value.
- The box office share of UK independent films was 10.5%, down from 16% in 2014.
- The top 100 films earned almost 93% of the gross box office, the highest share since 2008.
- A total of 34 3D films were released in 2015, down from 57 in 2014; their 3D takings accounted for 11% of UK and Republic of Ireland box office revenues, down from 12% in 2014.
- Sixteen films were released in the 3D IMAX format, grossing £31 million, 2% of total box office.
- UK films made with the backing of major US studios spent longer than other films, on average, in UK cinemas in 2015.

UK CINEMA ADMISSIONS

The 171.9 million cinema tickets sold in the UK in 2015 represented a 9% increase on the number of admissions in 2014. Overall, UK cinema attendances have remained relatively stable since 2006 (Figure 1). The results were more mixed across other worldwide territories, with some large increases and decreases. Admissions were up in China (46.6%), Argentina (39.5%) and Hong Kong (20.5%) but decreased in Russia (-36.1%), Brazil (-18.1%) and France (-16.5%).

Figure 1 Annual UK cinema admissions, 2006-2015



Year	Total admissions (million)
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6
2012	172.5
2013	165.5
2014	157.5
2015	171.9

Source: CAA, comScore

The overall annual rise in admissions in 2015 compared with 2014 was reflected in increased monthly attendances throughout the year with the sole exception of August (Table 1).

With a mixture of big holiday titles and awards contenders on release, January remains one of the most popular cinema-going months. Admissions in January 2015 were the third highest of the year and up very slightly (1%) on 2014. The Stephen Hawking biopic, *The Theory of Everything*, with takings of over £16.5 million, was the month's top earner, narrowly beating the all-action title *Taken 3*, while other strong performers included new releases *American Sniper* and *Into the Woods* and continuing 2014 hits *The Hobbit: The Battle of the Five Armies* and *Paddington*. The latter was still generating considerable box office into February and the half-term holiday period, alongside other popular 2015 family film releases, *Big Hero 6* and *Shaun the Sheep the Movie*. At the opposite end of the ratings scale, February also saw the opening of *Fifty Shades of Grey*, which was to become the biggest ever 18-certificate film at the UK box office, with a final gross of £35.1 million, well ahead of the record set by *The Wolf of Wall Street* in 2014 (£22.7 million). Overall, the month's admissions were up 6% on February 2014.

March attendances were up by a greater margin compared with 2014 (11%). The month's box office was dominated by another film aimed at older audiences, although not perhaps drawn from the same demographic as *Fifty Shades of Grey*. *The Second Best Exotic Marigold Hotel* held the top spot at the box office for three weeks. March also saw the release of *Home*, which had the biggest UK opening for an animation since *The Lego Movie* in 2014 and was the first-ever 3D animated film to feature a black lead.

April saw an even greater increase on the equivalent month in 2014, with attendances up nearly one fifth (19%). The top earning releases of that month included *Avengers: Age of Ultron*, which had the biggest opening of the year thus far and the highest April opening ever at the UK box office, and *Fast & Furious 7*. May admissions, which recorded the smallest rise of the year compared with the equivalent month in 2014, were boosted by the continued success of the latest Marvel outing alongside strong results from *Mad Max: Fury Road*, *Spooks: The Greater Good*, and the top earning comedy of the year, *Pitch Perfect 2*.

Without the added competition from major sporting events such as the FIFA World Cup in the previous year, admissions in June and July 2015 recorded respective increases of 28% and 20% over the equivalent months in 2014. The June box office was dominated by the surprising success of the legacy franchise outing *Jurassic World*, which held the number one spot for three consecutive weeks before being replaced by the top animation release of the year, *Minions*. The prequel to the Despicable Me series also held the top spot for three consecutive weeks, making it the highest earner of July. Other notable releases that month included *Bajrangi Bhaijaan*, the year's top performing foreign language film, and *Amy*, the year's top documentary and currently the all-time fourth highest grossing factual feature at the UK box office.

The only month to record a drop in attendances compared to its equivalent in 2014 was August, whose top earning films *Fantastic Four, Mission: Impossible – Rogue Nation* and *Pixels* failed to match the performance of the previous year's top August titles, *Guardians of the Galaxy, The Inbetweeners 2* and *Dawn of the Planet of the Apes*.

September had the lowest monthly admissions for the fourth year in a row. However, attendances were up 9% on the same month in 2014 in part due to strong performances by UK releases *Legend* and *Everest*. *Legend* was to become the year's top UK independent film with a final box office gross of £18.4 million.

The top spot at the box office in October was also dominated by UK qualifying films, with *The Martian* and *SPECTRE* holding the number one ranking for three out of four weekends. The latest James Bond outing broke UK box office records with an opening take of £41.3 million (albeit over seven days), the largest ever opening for a film in the UK. Its release, on 651 sites, was the second of the year to break the record for widest ever UK release following *Jurassic World* (619) in June. October also saw the release of the award-winning independent UK film, *Suffragette,* one of the few films of the year to be both written and directed by women.

SPECTRE continued to head the weekend charts for two weeks in November before losing the top spot for the remainder of the month to *The Hunger Games: Mockingjay – Part 2*, the year's top release by an independent distributor. Thanks to the boost from other strong performers such as *The Good Dinosaur* and *Bridge of Spies*, November recorded the second biggest rise in admissions of the year, with an increase of over one fifth (21%) on the same month in 2014.

UK box office records were smashed again in December, which saw the eagerly anticipated release of *Star Wars: The Force Awakens*. Now the all-time highest earning film at the UK box office, the sci-fi saga replaced *SPECTRE* as the UK's widest-ever release (676 sites), its Thursday opening generated the biggest ever one-day take at the UK box office (£9.7 million) and its three-day opening weekend generated the UK's biggest-ever Friday-Sunday gross (£24.2 million). Overall, December admissions were the highest of the year and 8% up on December 2014.

Table 1 Monthly UK cinema admissions, 2014 and 2015

Month	2014 (million)	2015 (million)	% +/- on 2014
January	15.2	15.4	1.3
February	14.3	15.2	5.8
March	10.4	11.5	11.4
April	12.7	15.1	19.3
May	12.6	12.7	0.5
June	10.4	13.3	27.5
July	13.3	15.9	19.5
August	17.1	14.4	-15.8
September	8.5	9.2	8.5
October	13.3	15.4	16.1
November	12.7	15.4	21.4
December	17.1	18.5	8.0
Total	**157.5**	**171.9**	**9.2**

Source: CAA, comScore
Note: Figures may not sum to totals due to rounding

Average weekly admissions in 2015 ranged from 2.2 million in September to 4.2 million in December (Table 2). Because of the low cinema attendances in June 2014 due to the FIFA World Cup, the largest increase in weekly admissions occurred in June, up from 2.4 million to 3.1 million, while August saw the only year-on-year decrease, down from 3.9 million to 3.2 million.

Table 2 Average weekly admissions, 2014 and 2015

Month	2014 (million)	2015 (million)
January	3.4	3.5
February	3.6	3.8
March	2.3	2.6
April	3.0	3.5
May	2.9	2.9
June	2.4	3.1
July	3.0	3.6
August	3.9	3.2
September	2.0	2.2
October	3.0	3.5
November	3.0	3.6
December	3.9	4.2

Source: CAA, comScore

Table 3 shows how the 2015 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA), with London accounting for 25% of UK admissions and the Midlands accounting for 14%. The Border region had the lowest number of admissions, accounting for just under 1% of attendances. The pattern of national and regional admissions has remained largely unchanged over the last decade.

Table 3 Cinema admissions by ISBA TV region, 2015

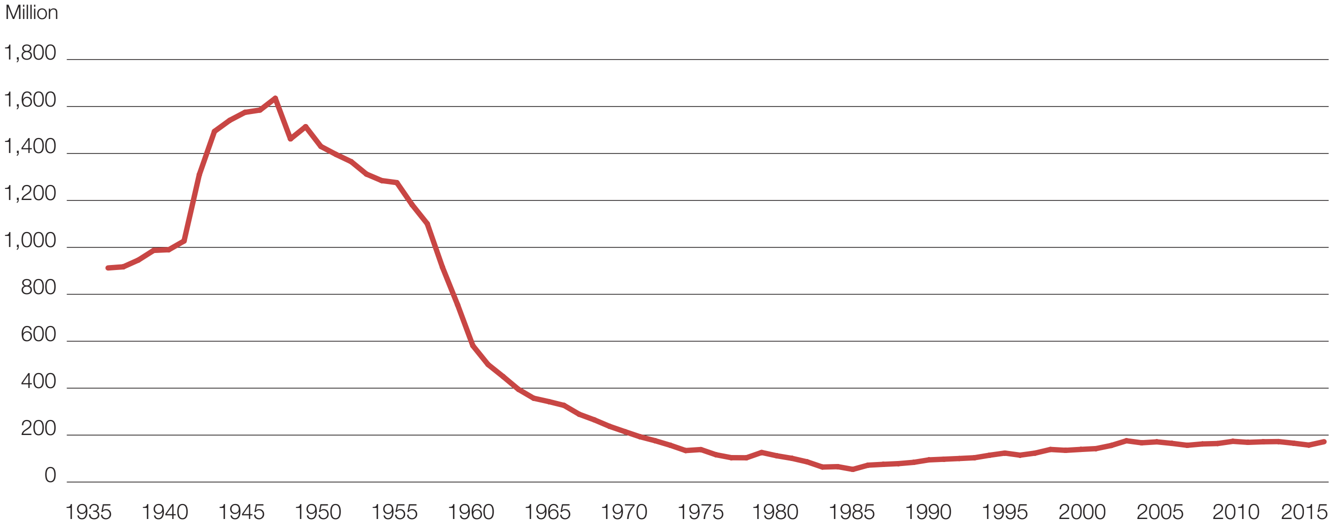
Region	Admissions (million)	%
London	43.1	25.1
Midlands	24.3	14.2
Lancashire	16.6	9.7
Southern	16.2	9.4
Yorkshire	13.7	8.0
East of England	12.4	7.2
Wales and West	12.4	7.2
Central Scotland	11.2	6.5
North East	6.6	3.8
Northern Ireland	5.8	3.4
South West	4.5	2.6
Northern Scotland	3.7	2.2
Border	1.3	0.8
Total	**171.9**	**100.0**

Source: CAA, comScore
Note: Figures/percentages may not sum to totals due to rounding.

Figure 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 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 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 2015 were the third highest of the last decade but since the early 2000s the trend has been fairly flat, with most years' admissions being in the range 165-170 million.

Figure 2 Annual UK admissions, 1935-2015



Year	Admissions (million)
1935	912.3
1936	917.0
1937	946.0
1938	987.0
1939	990.0
1940	1,027.0
1941	1,309.0
1942	1,494.0
1943	1,541.0
1944	1,575.0
1945	1,585.0
1946	1,635.0
1947	1,462.0
1948	1,514.0
1949	1,430.0
1950	1,395.8
1951	1,365.0
1952	1,312.1
1953	1,284.5
1954	1,275.8
1955	1,181.8
1956	1,100.8
1957	915.2
1958	754.7
1959	581.0
1960	500.8
1961	449.1

Year	Admissions (million)
1962	395.0
1963	357.2
1964	342.8
1965	326.6
1966	288.8
1967	264.8
1968	237.3
1969	214.9
1970	193.0
1971	176.0
1972	156.6
1973	134.2
1974	138.5
1975	116.3
1976	103.9
1977	103.5
1978	126.1
1979	111.9
1980	101.0
1981	86.0
1982	64.0
1983	65.7
1984	54.0
1985	72.0
1986	75.5
1987	78.5
1988	84.0

Year	Admissions (million)
1989	94.5
1990	97.4
1991	100.3
1992	103.6
1993	114.4
1994	123.5
1995	114.6
1996	123.5
1997	138.9
1998	135.2
1999	139.1
2000	142.5
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
2012	172.5
2013	165.5
2014	157.5
2015	171.9

Source: BFI, CAA, comScore

UK BOX OFFICE EARNINGS

According to comScore, the total UK box office for 2015 was £1,236 million, the highest figure since our records began, and up 17% on 2014 (Table 4). This figure covers all box office earnings during the calendar year 2015 for films exhibited in the UK whose box office takings were tracked by comScore. Since 2006 there has been an upward trend in UK box office earnings; the overall gross for 2015 was 62% higher than in 2006.

Table 4 UK box office trends, 2006-2015

Year	Box office gross (£ million)	% +/-	Change since 2006 %
2006	762	–	–
2007	821	7.7	7.7
2008	850	3.5	11.5
2009	944	11.1	23.9
2010	988	4.7	29.7
2011	1,040	5.3	36.5
2012	1,099	5.7	44.2
2013	1,083	-1.0	42.1
2014	1,058	-2.3	38.8
2015	1,236	16.8	62.1

Source: CAA, Rentrak

FILM RELEASES AND BOX OFFICE REVENUES IN THE UK AND REPUBLIC OF IRELAND

In 2015, 759 films (an average of almost 15 per week) were released for a week or more in the UK and Republic of Ireland, 47 more than in 2014.

The 759 releases in 2015 generated £1,298 million in box office revenues, an increase of 20% on 2014. This figure differs from the £1,236 million in the section on UK box office earnings because it includes revenues generated in 2016 by films released in 2015 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 2015 and includes revenues generated up to 21 February 2016.

As can be seen in Table 5, the top 100 films took 93% of the box office, the highest share of the period 2008-2015. The remaining 659 films (87% of all releases) accounted for just 7% of gross revenues. A total of 34 films were released in the 3D format, substantially down from 57 in 2014. The 3D takings from these releases (£137 million) accounted for 11% of the total box office in 2015 compared with 12% (£133 million) in 2014. Sixteen films were released in 3D IMAX in 2015, generating a gross of £31 million (just over 2% of overall box office).

Table 5 Summary of results at the UK and Republic of Ireland box office, 2008–2015

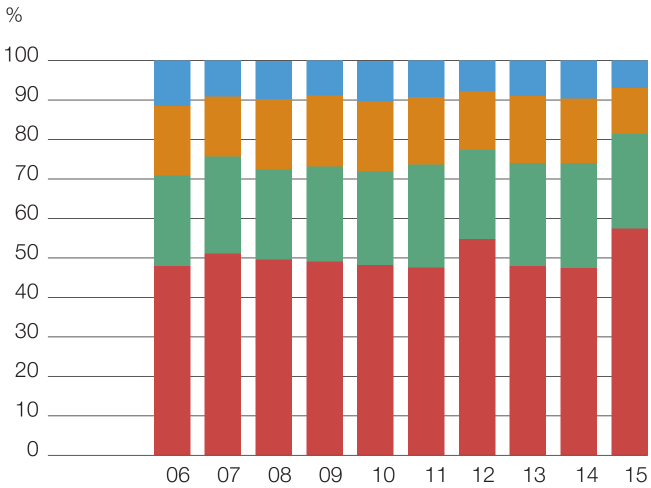
	2008	2009	2010	2011	2012	2013	2014	2015
Releases	527	503	557	558	647	698	712	759
Combined gross (£ million)	934.5	1,126.7	1,023.6	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4
Top 20 films (% of box office)	49.6	48.6	48.2	47.5	54.8	47.8	47.4	57.4
Top 50 films (% of box office)	72.4	72.9	71.9	73.7	77.3	73.7	74.1	81.4
Top 100 films (% of box office)	90.3	91.1	89.7	90.7	92.1	91.0	90.4	93.0

Source: Rentrak, BFI RSU analysis

Note: Table 5 and all subsequent analysis of the theatrical market includes all titles released in 2015. The combined gross reflects the territorial gross (ie including the Republic of Ireland), and includes those titles released in 2015 but also generating revenue into 2016, up to and including 21 February 2016.

As Figure 3 shows, the market share of the top 50 highest grossing films has been relatively stable since 2006, taking on average 74% of box office revenues. However, in 2012 and 2015 the box office share of the top 50 films reached 77% and 81% respectively, mainly due to the success of some very high earning films in those years such as *Skyfall* (£103 million) and *The Dark Knight Rises* (£56 million) in 2012 and *Star Wars: The Force Awakens* (£122 million) and *SPECTRE* (£95 million) in 2015. At 57%, the box office share of the top 20 films in 2015 was the highest of the period, while the share of films outside the top 100, at 7%, was the lowest.

Figure 3 Market share of top 20, 21-50, 51-100 and rest of films, 2006-2015



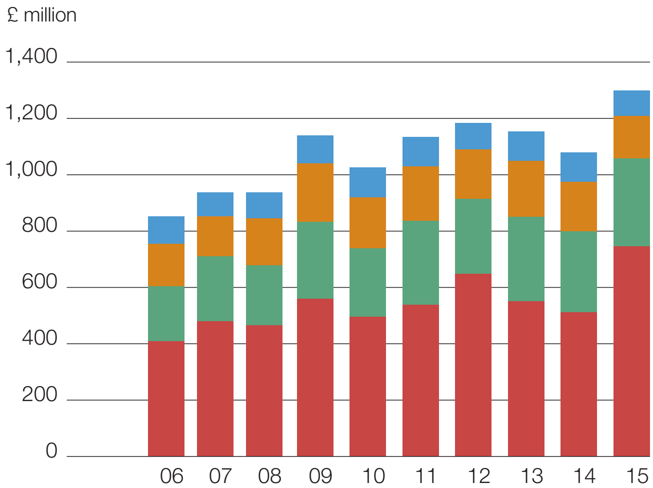
	06	07	08	09	10	11	12	13	14	15
% share of top 20	47.9	51.1	49.6	49.1	48.2	47.5	54.8	48.0	47.4	57.4
% share of 21-50	23.0	24.5	22.7	24.0	23.7	26.2	22.5	26.0	26.7	24.0
% share of 51-100	17.6	15.2	17.9	18.1	17.7	17.0	14.8	17.0	16.3	11.6
% share of rest	11.5	9.2	9.7	8.8	10.3	9.3	7.9	9.0	9.6	7.0

Source: comScore, BFI RSU analysis
Note: Percentages may not sum to 100 due to rounding.

Figure 4 shows box office revenue in the UK and Republic of Ireland over the last 10 years. The total box office generated in 2015 was the highest recorded over the period, and was up 52% compared with 2006. The takings of the top 20 film releases, also the highest of the period at £746 million, were up 46% compared with 2014, and up 83% on 2006. The films ranked 21-50 earned £312 million in 2015, an increase on 2014's total and up 59% since 2006, while those ranked 51-100 earned £150 million, a decrease on the preceding year and the lowest figure since 2007.

The combined box office of all films outside the top 100 was £91 million in 2015, the same low figure as 2008. In that year, the £91 million taken by films outside the top 100 was shared by 427 individual titles, giving a median box office of £39,017. In 2015, the £91 million taken by films outside the top 100 was shared by 659 titles, giving a median box office of £19,743. This highlights the increasing difficulties faced by independent distributors who are competing for a small market share but also shows their success in achieving theatrical releases for more independent films than in recent years. As Figures 3 and 4 show, while there are variations in the actual takings and box office share for all films outside the top 100, the majority of releases are competing for a seemingly smaller share of the box office.

Figure 4 Gross box office of top 20, 21-50, 51-100 and rest of films, 2006-2015



	06	07	08	09	10	11	12	13	14	15
Gross box office of top 20	408	480	465	559	495	539	648	551	511	746
Gross box office of 21-50	196	230	213	274	243	297	267	299	288	312
Gross box office of 51-100	150	142	168	206	182	193	175	199	176	150
Gross box office of rest	98	86	91	101	106	106	93	104	103	91

Source: comScore, BFI RSU analysis

Table 6 outlines the number of films released in the UK in 2015 by the number of sites at the widest point of release (WPR). A total of 192 releases were shown at 100 sites or more (25% of all films released), while 279 films were shown at fewer than 10 sites (37%). Three quarters of all films released in the UK in 2015 were shown at fewer than 100 sites.

Table 6 Number of releases and median box office gross by number of sites at widest point of release, 2015

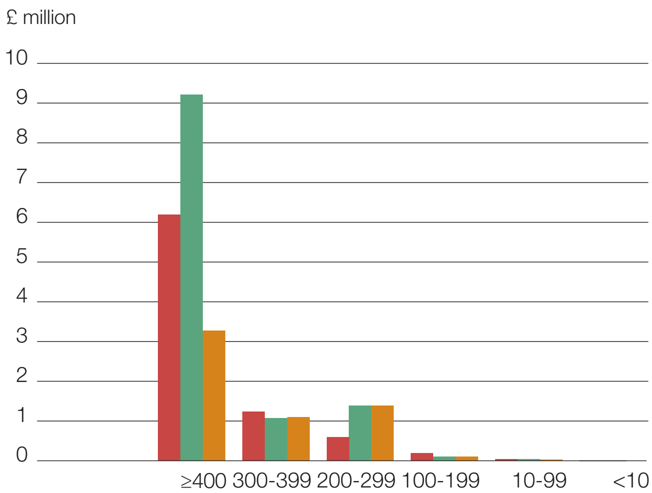
Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥500	46	6.1	15,410,951	2,631,045	122,326,526
400 - 499	50	6.6	2,845,078	437,122	17,198,987
300 - 399	33	4.3	1,238,153	434,773	6,050,537
200 - 299	22	2.9	596,389	48,806	3,763,752
100 - 199	41	5.4	186,359	16,190	2,661,974
50 - 99	52	6.9	157,821	12,670	1,518,570
10 - 49	236	31.1	38,140	<1,000	593,432
<10	279	36.8	3,756	<1,000	113,155
Total	**759**	**100.0**	**33,875**	**<1,000**	**122,326,526**

Source: comScore, BFI RSU analysis
Note: Percentages may not sum to totals due to rounding.

Figure 5 shows the median box office gross by number of sites at widest point of release for all films, UK films and UK independent films in 2015. The median for UK films, at £9.2 million, was higher than for the other two categories for titles released at 400 or more sites, whereas the median for all films was higher than the other categories for titles released at 300-399 sites, 100-199 sites and 10-99 sites. The UK films which achieve the widest releases are usually higher budget titles made by or in cooperation with the major US studios, such as the 2015 titles, *Star Wars: The Force Awakens*, *SPECTRE* and *Avengers: Age of Ultron*.

For all but the highest WPR band, the median box office grosses for UK and UK independent films were the same with the exception of the 300-399 band, where the median for UK independent films (1.10) was slightly higher than for UK films (1.07).

Figure 5 Median box office gross by number of sites at widest point of release for all films, UK films and UK independent films, 2015



	≥400	300-399	200-299	100-199	10-99	<10
All films	6.20	1.24	0.60	0.19	0.05	<0.01
UK films	9.22	1.07	1.39	0.11	0.04	<0.01
UK independent films	3.28	1.10	1.39	0.11	0.04	<0.01

Source: BFI, RSU

COUNTRY OF ORIGIN OF FILM RELEASES

As Table 7 shows, 29% of all films released in the UK in 2015 were of USA origin (excluding UK co-productions) and these films accounted for 51% of total box office earnings. UK films, including co-productions, represented 28% of releases (up from 22% in 2014) and shared around 45% of the box office, of which UK independent films earned 10.5% and UK studio-backed titles earned 34.2%.

Films whose countries of origin lie outside the UK and USA accounted for 44% of releases (down from 46% in 2014) but just over 4% of earnings (down from 7% in 2014). The decrease in box office for non-UK and non-USA films came mainly from other European films whose box office share fell from 4.9% in 2014 to 2.4% in 2015 (from 16% of all releases). Films from India accounted for 1.3% of the total box office from 15% of releases, compared with 1.5% in 2014, and films from the rest of the world accounted for 0.5% of the box office, from 13% of releases, down from 1.1% in 2014.

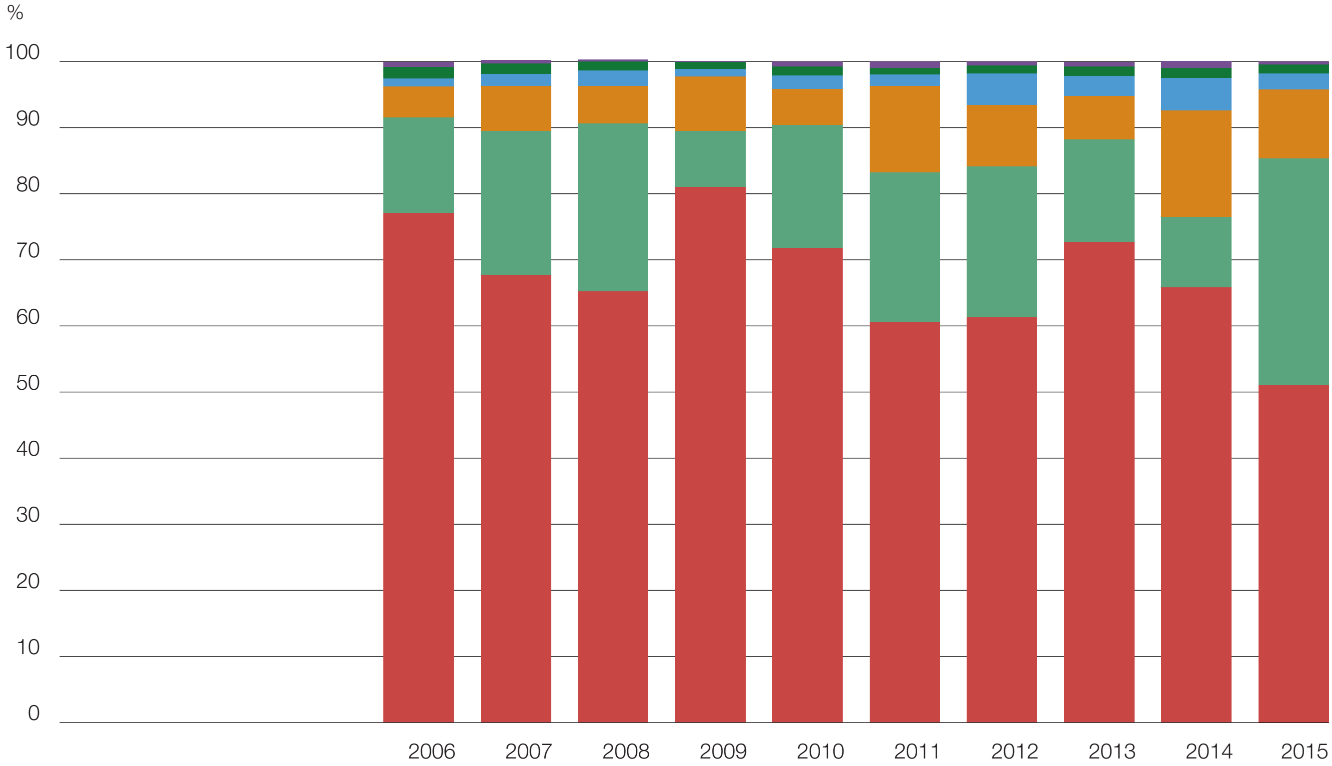
Table 7 Country of origin of films released in the UK and Republic of Ireland, 2015

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	Box office share (%)
USA	218	28.7	663.5	51.1
UK studio-backed*	27	3.6	443.9	34.2
UK independent	182	24.0	136.0	10.5
All UK	209	27.5	579.8	44.7
Other Europe	119	15.7	30.9	2.4
India	115	15.2	17.2	1.3
Rest of the world	98	12.9	7.0	0.5
Total	**759**	**100.0**	**1,298.4**	**100.0**

Source: comScore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 21 February 2016.
Figures/percentages may not sum to totals/subtotals due to rounding.
* 'Studio-backed' means backed by one of the major US film studios.

The changes in market share for films by country of origin between 2006 and 2015 are shown in Figure 6. The share of USA-only and UK studio-backed films had remained at around 90% up to 2010, but in 2011 this share dropped to 83%, with the share for USA films (just under 61%) being the second lowest for the period. Similar shares for USA and UK studio-backed films were seen in 2012, before this share increased to 88% in 2013, a level comparable to the years up to 2010. In 2014, the share of USA and UK studio-backed was at its lowest over the period at 76%, but in this year the share for UK independent films reached a new high of 16%. In 2015, the combined share for USA and UK studio-backed films rose again to 85%, however the share for USA films was the lowest in the period, at 51%, while the share for UK studio-backed titles was the highest, at 34%. In 2015, seven of the top 15 highest earning films, including *Stars Wars: The Force Awakens* and *SPECTRE*, were UK studio-backed films.

Figure 6 Market share by country of origin, 2006-2015



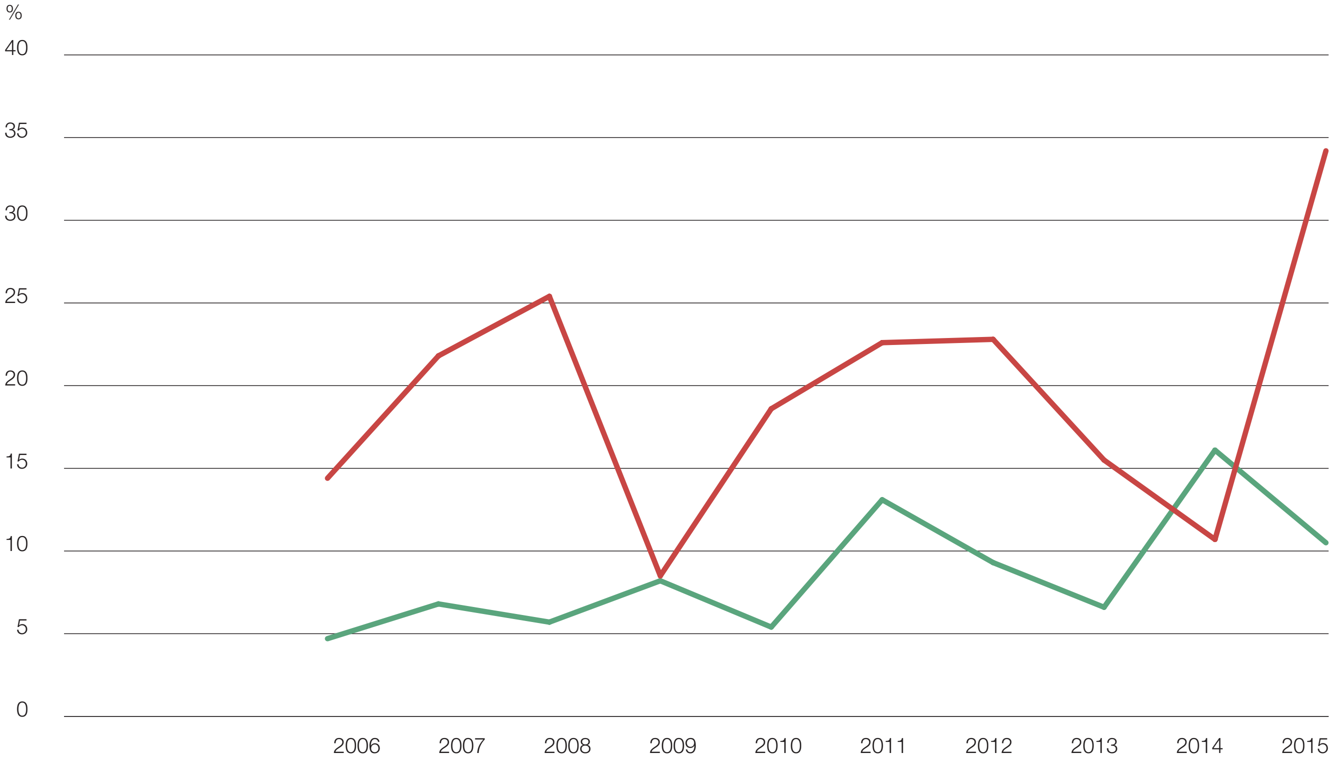
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Rest of the world	0.7	0.5	0.3	0.2	0.8	1.0	0.6	0.7	1.1	0.5
India	1.8	1.6	1.4	1.0	1.3	1.0	1.2	1.4	1.5	1.3
Other Europe	1.2	1.8	2.3	1.2	2.1	1.7	4.8	3.0	4.9	2.4
UK independent	4.7	6.8	5.7	8.2	5.4	13.1	9.3	6.6	16.1	10.5
UK studio-backed*	14.4	21.8	25.4	8.5	18.6	22.6	22.8	15.5	10.7	34.2
USA	77.1	67.7	65.2	81.0	71.8	60.6	61.3	72.7	65.8	51.1

Source: BFI, RSU

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

The fluctuating pattern of UK market share is underlined in Figure 7 with the annual figure dependent on a small number of high grossing titles. The average UK independent market share for the 10-year period was just under 9% with an upward trend from a low of just below 5% in 2006. At 10.5%, the market share for independent UK films in 2015 was the third highest of the period, but down from a peak of 16% in 2014. At over 34%, the UK studio-backed market share in 2015 was the highest since our records began and a substantial increase of over 20 percentage points on the previous year.

Figure 7 UK films' share of the UK theatrical market, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
UK studio-backed films*	14.4	21.8	25.4	8.5	18.6	22.6	22.8	15.5	10.7	34.2
UK independent films	4.7	6.8	5.7	8.2	5.4	13.1	9.3	6.6	16.1	10.5

Source: BFI, RSU

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

Table 8 compares the number of UK and non-UK films released in the UK and Republic of Ireland in 2015 across several gross box office bands. Overall, there are over two and half times as many non-UK releases as UK releases, 550 compared to 209 films. There were seven UK qualifying films (including *Star Wars: The Force Awakens*, *SPECTRE* and *Avengers: Age of Ultron*) in the over £20 million gross band compared to nine non-UK films (including *Jurassic World*, *Minions* and *Inside Out*). In the second box office band there were eight UK films compared with nine non-UK titles, and in the third band there were seven UK films compared with 14 non-UK titles.

Overall, UK films made up 45% of all releases earning over £10 million in 2015, more than double the 20% seen in 2014. The proportion of UK films in the lowest box office band was 66%, compared with 58% in 2014.

Table 8 UK and non-UK releases by box office band, 2015

	Non-UK releases		UK releases	
Box office gross (£ million)	Number	% releases	Number	% releases
≥20	9	1.6	7	3.3
10 - 19.99	9	1.6	8	3.8
5 - 9.99	14	2.5	7	3.3
1 - 4.99	51	9.3	20	9.6
0.1 - 0.99	108	19.6	28	13.4
<0.1	359	65.3	139	66.5
Total	**550**	**100.0**	**209**	**100.0**

Source: comScore, BFI RSU analysis
Note: Percentages may not sum to 100 due to rounding.

Table 9 shows the percentages of UK film releases by box office band from 2008 to 2015. In 2015, 80% of UK films earned less than £1 million at the box office, the third highest percentage of the time period. The seven UK films which earned £20 million or more in 2015 equate to 3% of all UK releases in that year; this is the second highest proportion of the eight-year period. The percentage of UK films earning between £10 and £20 million in 2015, at 4%, was the second highest percentage of releases in this band of the period, while the 10% of UK films in 2015 earning between £1 and £5 million was the third lowest in the period after 2010 (just over 8%) and 2012 (8%).

Table 9 UK releases by box office band, 2008–2015

	2008		2009		2010		2011		2012		2013		2014		2015	
Box office gross (£ million)	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No	%
≥20	3	2.7	3	2.7	3	2.5	7	5.5	5	3.1	4	2.8	3	1.9	7	3.3
10 - 19.99	2	1.8	0	–	6	5.0	4	3.1	3	1.9	3	2.2	3	1.9	8	3.8
5 - 9.99	6	5.4	6	5.3	3	2.5	6	4.7	7	4.3	8	5.8	9	5.8	7	3.3
1 - 4.99	17	15.3	14	12.3	10	8.4	16	12.6	13	8.0	14	10.1	21	13.6	20	9.6
0.1 - 0.99	23	20.7	21	18.4	20	16.8	24	18.9	32	19.8	21	15.1	28	18.2	28	13.4
<0.1	60	54.1	70	61.4	77	64.7	70	55.1	102	63.0	89	64.0	90	58.4	139	66.5
Total	**111**	**100.0**	**114**	**100.0**	**119**	**100.0**	**127**	**100.0**	**162**	**100.0**	**139**	**100.0**	**154**	**100.0**	**209**	**100.0**

Source: comScore, BFI RSU analysis
Notes:
Figures for 2014 updated since publication of the 2015 Statistical Yearbook.
Percentages may not sum to 100 due to rounding.

LENGTH OF RELEASE

We have previously looked at width of release, but also of interest is the length of time a film is on release. Overall, the median length of release in the UK in 2015 was seven weeks but over 100 films were on release in the UK for only one or two weeks.

Looking at country of origin, the films which stayed in cinemas the longest, on average, were those produced in the UK but made in collaboration with the major US studios (with a median length of release of 17 weeks) followed by films produced in the USA (11 weeks). Indian films had the shortest releases, on average, with a median of three weeks (Table 10). At 38 weeks, the longest running UK studio-backed films in 2015 were *The Theory of Everything* and *Cinderella*, and the longest running USA-only film was *Big Hero 6* at 50 weeks (the longest release of any film in 2015). The highest grossing film of 2015, *Star Wars: the Force Awakens*, had been on release for 11 weeks to 21 February 2016.

At eight weeks, the median length of release for UK independent films was lower than for both UK studio-backed films and USA films, but some UK independent films did receive much longer releases. *Shaun the Sheep the Movie* had the longest run of all UK independent films, with 46 weeks.

Table 10 Median number of weeks on release by country of origin, 2015

Country of origin	Number of films	Median number of weeks on release
USA	218	11
UK studio-backed*	27	17
UK independent	182	8
All UK	209	9
Other Europe	119	10
India	115	3
Rest of the world	98	4
Total	**759**	**7**

Source: comScore, BFI RSU analysis

Notes:

Number of weeks = the number of weeks on release up to 21 February 2016.

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

CHAPTER 2
TOP FILMS IN 2015

Image: *Legend* courtesy of StudioCanal

TOP FILMS IN 2015

Three of the top four films released at the UK box office in 2015 were UK qualifying productions. The year's top title, *Star Wars: The Force Awakens*, became the highest earning film of all time in the UK with gross receipts of more than £122 million.

FACTS IN FOCUS

- The biggest film of the year was *Star Wars: The Force Awakens* with takings of over £122 million, a new UK box office record.
- Sixteen films earned £20 million or over at the UK box office in 2015, two more than in 2014.
- Eight UK qualifying films featured in the top 20 films of the year, one of which was an independent UK film.
- *Legend*, with takings of £18 million, was the highest earning independent UK film of the year.
- The top 20 UK films grossed £511 million, 41% of the total UK box office.
- Independent UK films accounted for 16% of the total box office for the top 20 UK films, compared with 54% in 2014.
- Eleven UK qualifying films spent a total of 20 weeks at the top of the UK weekend box office charts.
- The box office revenue generated from 3D film screenings was £137 million. This was 11% of the overall box office, down from 12% in 2014.

THE TOP 20 FILMS

The top performing release at the box office in the UK and Republic of Ireland in 2015 was *Star Wars: The Force Awakens*, with earnings (to 21 February 2016) of over £122 million. Currently the all-time highest earning film at the UK box office, the latest instalment from the Star Wars franchise grossed more in its first four days alone (£34 million) than the final tallies of 12 of the titles in the year's top 20 chart. The second most popular release was the latest James Bond outing, *SPECTRE*, which earned £95 million, the third highest gross of all time at the UK box office, and a figure which ordinarily would have seen it top the annual chart. In addition to the leading two earners, six other UK qualifying films featured in the top 20, one of which was an independent title. There were five UK titles in the top 20 films of 2014, three of which were independent films.

Sixteen films earned £20 million or over at the UK box office in 2015, an increase from 14 in 2014 (Table 1). Sequels and franchises accounted for 12 of the top 20 films, the same as in 2014.

Action was the most popular genre in the 2015 list of top 20 films, in terms of both number of releases and box office takings. It accounted for six titles, including *SPECTRE*, *Jurassic World* and *Avengers: Age of Ultron*, which between them earned £285 million. Animation was in second place, again in terms of both number of releases and total box office takings, grossing £153 million from five releases. The record-breaking gross earned by *Star Wars: The Force Awakens* together with the takings from *The Martian* made sci-fi the third highest earning genre in the top 20 with £146 million.

Table 1 Box office results for the top 20 films released in the UK and Republic of Ireland, 2015

	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£ million)	Distributor
1	Star Wars: The Force Awakens*	UK/USA	122.3	676	34.0+	Walt Disney
2	SPECTRE*	UK/USA	95.2	651	41.3+	Sony Pictures
3	Jurassic World*	USA	64.5	619	19.4+	Universal
4	Avengers: Age of Ultron	UK/USA	48.3	585	18.0+	Walt Disney
5	Minions*	USA/Fra	47.7	601	11.7	Universal
6	Inside Out*	USA	39.3	608	7.4	Walt Disney
7	Fast & Furious 7	USA	38.6	537	12.7	Universal
8	Fifty Shades of Grey	USA	35.1	585	13.6	Universal
9	The Hunger Games: Mockingjay – Part 2	USA/Ger	29.2	579	11.3+	Lionsgate
10	Home	USA	25.4	531	6.0+	20th Century Fox
11	The Martian*	UK/USA	23.5	582	6.6+	20th Century Fox
12	The Theory of Everything	UK/USA	21.7	532	3.7+	Universal
13	Cinderella	UK/USA	21.3	556	3.8	Walt Disney
14	Mission: Impossible – Rogue Nation	UK/USA	21.2	572	5.4+	Paramount
15	Big Hero 6	USA	20.7	501	4.3	Walt Disney
16	Hotel Transylvania 2	USA	20.4	563	6.3+	Sony Pictures
17	Legend	UK/Fra/USA#	18.4	522	5.2+	StudioCanal
18	Taken 3	Fra	17.8	483	6.7+	20th Century Fox
19	Pitch Perfect 2	USA	17.4	497	5.0+	Universal
20	Mad Max: Fury Road	USA/Aus	17.4	546	4.5+	Warner Bros

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2016.

* Film still on release on 21 February 2016.

\# Film made with independent (non-studio) US support or with the independent arm of a US studio.

\+ Film had an extended opening weekend (the largest of which was a seven-day opening for *SPECTRE*).

THE TOP 20 UK QUALIFYING FILMS

The top 20 UK films of 2015, shown in Table 2, had a combined gross of £511 million, which was 41% of the total UK box office. This was more than double the £239 million earned by the top 20 UK films released in 2014 (22% of the total box office) and is the highest combined box office gross for the top 20 UK films of any year since our records began. Fifteen UK films grossed more than £10 million in 2015, nine more than in 2014. The list is dominated by UK/USA collaborations, most of which were studio-backed productions. Six of the top 20 titles were UK independent films, four less than in 2014, and they accounted for 16% of the total box office for the top 20 UK films, a large decrease on 2014's 54% when the two highest earning UK films where independent titles.

The range of genres in the top 20 illustrates the variety of UK film production. The top UK qualifying release of 2015 was a sci-fi film and eight other genres were represented, including adventure, animation, biopic and comedy. Action, with a combined box office gross of nearly £193 million from five releases, was the highest earning genre in the chart.

Table 2 Box office results for the top 20 UK qualifying films released in the UK and Republic of Ireland, 2015

	Title	Country of origin	Box office gross (£ million)	Distributor
1	Star Wars: The Force Awakens*	UK/USA	122.3	Walt Disney
2	SPECTRE*	UK/USA	95.2	Sony Pictures
3	Avengers: Age of Ultron	UK/USA	48.3	Walt Disney
4	The Martian*	UK/USA	23.5	20th Century Fox
5	The Theory of Everything	UK/USA	21.7	Universal
6	Cinderella	UK/USA	21.3	Walt Disney
7	Mission: Impossible – Rogue Nation	UK/USA	21.2	Paramount
8	Legend	UK/Fra/USA#	18.4	StudioCanal
9	Kingsman: The Secret Service	UK/USA	16.6	20th Century Fox
10	Ant-Man	UK/USA	16.3	Walt Disney
11	The Second Best Exotic Marigold Hotel	UK/USA#	16.0	20th Century Fox
12	Shaun the Sheep the Movie	UK/Fra	13.8	StudioCanal
13	The Lady in the Van*	UK/USA#	13.0	Sony Pictures
14	Terminator Genisys	UK/USA	11.1	Paramount
15	Everest	UK/USA/Ice	10.7	Universal
16	Into the Woods	UK/USA/Can	9.9	Walt Disney
17	Suffragette*	UK	9.9	Pathé
18	Pan*	UK/USA	9.2	Warner Bros
19	The Man from U.N.C.L.E.	UK/USA	6.5	Warner Bros
20	Far from the Madding Crowd	UK/USA#	6.2	20th Century Fox

Source: Rentrak, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2016.

* Film still on release on 21 February 2016.

\# Film made with independent (non-studio) US support or with the independent arm of a US studio.

THE TOP 20 UK INDEPENDENT FILMS

The top 20 UK independent films of 2015, shown in Table 3, had a combined gross of £117 million, which was 9% of the total UK box office, a decrease on the 14% seen in 2014. Just over half of this total was earned by the top four independent releases, each of which grossed over £10 million. In 2014, three independent UK releases earned over £10 million, two of which (*Paddington* and *The Inbetweeners 2*) grossed over £30 million.

As in previous years the top 20 UK independent films had the widest variety of genres of all three top 20 charts, including comedy, horror, mystery, romance, sci-fi and thriller. Generating £36.5 million from four releases, biopic was the biggest earner followed by drama with £22.4 million from five releases. The list includes one animation – *Shaun the Sheep the Movie* and one documentary – *Amy*.

Table 3 Box office results for the top 20 UK independent films released in the UK and Republic of Ireland, 2015

	Title	Country of origin	Box office gross (£ million)	Distributor
1	Legend	UK/Fra/USA#	18.4	StudioCanal
2	The Second Best Exotic Marigold Hotel	UK/USA#	16.0	20th Century Fox
3	Shaun the Sheep the Movie	UK/Fra	13.8	StudioCanal
4	The Lady in the Van*	UK/USA#	13.0	Sony Pictures
5	Suffragette*	UK	9.9	Pathé
6	Far from the Madding Crowd	UK/USA#	6.2	20th Century Fox
7	Brooklyn*	UK/Can/Ire	5.6	Lionsgate
8	The Woman in Black: Angel of Death	UK/Can/USA#	5.0	eOne Films
9	Amy	UK	3.8	Altitude
10	Spooks: The Greater Good	UK	3.3	20th Century Fox
11	Ex Machina	UK/USA#	2.9	Universal
12	Woman in Gold	UK/USA#	2.9	Entertainment
13	Macbeth	UK/Fra	2.9	StudioCanal
14	Mr Holmes	UK/USA#	2.7	eOne Films
15	Testament of Youth	UK	2.2	Lionsgate
16	The Bad Education Movie	UK	2.0	Entertainment
17	45 Years	UK	1.8	Curzon Artificial Eye
18	A Little Chaos	UK	1.6	Lionsgate
19	The Lobster	UK/Fra/Gre	1.5	Picturehouse/Element
20	A Royal Night Out	UK	1.5	Lionsgate

Source: comScore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.
# Film made with independent (non-studio) US support or with the independent arm of a US studio.

THE TOP 3D FILMS

Thirty-four 3D films were released in 2015, generating £137 million (to 21 February 2016) from their 3D screenings. This aggregate gross from 3D screenings represents 11% of the UK and Republic of Ireland box office, down from 12% in 2014.

The top 20 3D releases in 2015 are listed in Table 4. *Star Wars: The Force Awakens* had the highest 3D takings whilst *Paranormal Activity: Ghost Dimension 3D*, at 68%, had the highest proportion of total gross from 3D screens. (The 3D grosses in the table do not include takings from IMAX screenings.) On average the percentage of films' total box office taken in 3D screenings has decreased from a high point in 2010. Excluding films which were shown only on 3D screens, the median 3D takings as a percentage of total takings has fallen from 71% in 2010 to 25% in 2015. This suggests that overall enthusiasm for the 3D format is waning.

Table 4 Top 20 3D releases in the UK and Republic of Ireland, 2015 (ranked by 3D gross)

	Title	Total gross (£ million)	3D gross (£ million)	3D as % of total gross	Number of 3D sites	Distributor
1	Star Wars: The Force Awakens*	122.3	34.6	28	546	Walt Disney
2	Jurassic World*	64.5	20.6	32	511	Universal
3	Avengers: Age of Ultron	48.3	13.2	27	504	Walt Disney
4	The Martian*	23.5	8.0	34	462	20th Century Fox
5	Minions*	47.7	7.7	16	476	Universal
6	Inside Out*	39.3	4.9	13	490	Walt Disney
7	Mad Max: Fury Road	17.4	4.8	28	450	Warner Bros
8	The Hunger Games: Mockingjay – Part 2	29.2	3.9	14	472	Lionsgate
9	Everest	10.7	3.9	36	488	Universal
10	San Andreas	11.5	3.8	33	424	Warner Bros
11	Big Hero 6	20.7	3.6	18	432	Walt Disney
12	Home	25.4	3.2	13	402	20th Century Fox
13	Ant-Man	16.3	3.1	19	446	Walt Disney
14	Terminator: Genisys	11.1	2.9	26	441	Paramount
15	Paranormal Activity: Ghost Dimension 3D	4.0	2.7	68	362	Paramount
16	Hotel Transylvania 2	20.4	1.8	9	373	Sony Pictures
17	Poltergeist	4.0	1.8	46	369	20th Century Fox
18	Jupiter Ascending	4.4	1.6	37	355	Warner Bros
19	Pan*	9.2	1.6	17	413	Warner Bros
20	The Divergent Series: Insurgent	8.0	1.6	20	388	eOne Films

Source: comScore

Notes:

Box office gross = cumulative total up to 21 February 2016.

* Film still on release on 21 February 2016.

The 3D grosses do not include takings from IMAX screenings, but IMAX revenues contribute to the total gross.

The recent growth of the IMAX market in the UK means we are now able to extend our coverage to include data on large format 3D box office results for the first time. Table 5 lists the top 20 3D releases on IMAX-enabled screens in 2015. The total box office gross generated by 3D IMAX screenings in 2015 was £31 million, which was 2% of the overall box office. (This is double the total of £16 million achieved in 2014.) Almost half of 2015's 3D IMAX earnings were generated by the year's top film, *Star Wars: The Force Awakens* (£15 million).

When combining 3D and 3D IMAX revenues, two films took over half of their total box office from these screenings, *The Walk* (75%) and *Everest* (51%), whereas one film – *Paranormal Activity: Ghost Dimension 3D* – earned more than half its final box office total from non-IMAX 3D screenings alone. The figures suggest that while audiences are increasingly selective about which films they choose to watch in the 3D format, they will still pay premium prices for new technologies that are perceived to offer an enhanced film-going experience.

Table 5 3D IMAX releases in the UK and Republic of Ireland, 2015 (ranked by IMAX 3D gross)

	Title	Total gross (£ million)	IMAX 3D gross (£ million)	IMAX 3D as % of total gross	Number of IMAX 3D sites	Distributor
1	Star Wars: The Force Awakens*	122.3	14.5	12	41	Walt Disney
2	Jurassic World*	64.5	5.4	8	36	Universal
3	Avengers: Age of Ultron	48.3	3.5	7	33	Walt Disney
4	Everest	10.7	1.5	15	39	Universal
5	Mad Max: Fury Road	17.4	1.5	9	32	Warner Bros
6	Terminator: Genisys	11.1	0.9	8	35	Paramount
7	Ant-Man	16.3	0.9	6	35	Walt Disney
8	Jupiter Ascending	4.4	0.6	13	31	Warner Bros
9	San Andreas	11.5	0.5	4	33	Warner Bros
10	The Walk	1.4	0.4	30	38	Sony Pictures
11	Big Hero 6	20.7	0.3	1	32	Walt Disney
12	The Divergent Series: Insurgent	8.0	0.3	4	31	eOne Films
13	Pixels	8.4	0.2	3	35	Sony Pictures
14	Seventh Son	0.9	0.1	10	32	Universal
15	Inside Out*	39.3	0.1	<1	1	Walt Disney
16	The Martian*	23.5	<0.1	<1	18	20th Century Fox

Source: comScore
Notes:
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.
The 3D grosses do not include takings from IMAX screenings, but IMAX revenues contribute to the total gross.

Again, looking at box office earnings for 3D screenings excluding IMAX revenues, if we compare the average takings per site for 3D sites with the average takings for 2D sites for a particular film, it provides a measure of the relative popularity of 3D viewings compared with 2D viewings for that film. Looking at the ratio of 3D site averages to 2D site averages, the higher the value the more popular were the film's 3D viewings compared with its 2D viewings.

Table 6 shows the top 20 films ranked by this ratio of 3D average box office per site to 2D average box office per site. The list includes the top films by this ranking from 3D films released between 2012 and 2015 which were shown at a minimum of five sites in both 3D and 2D formats. Ten of the films in the list are 2012 releases, seven are 2013 releases and three are 2014 releases. Tellingly there are no 2015 releases in the list. The chart again suggests that enthusiasm for the 3D format is diminishing.

Table 6 Top 20 3D films ranked by ratio of 3D site average box office to 2D site average box office, 2012-2015

	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	Cathedrals of Culture	2014	13	11	1,182	<1	5	50	23.6
2	Gravity	2013	25,733	506	50,856	2,581	430	6,003	8.5
3	Monsters, Inc. 3D	2013	2,247	365	6,157	208	180	1,155	5.3
4	Kochadaiiyaan	2014	68	5	13,584	89	33	2,705	5.0
5	Dredd	2012	4,238	383	11,066	127	52	2,435	4.5
6	Finding Nemo 3D	2013	1,118	330	3,388	128	171	749	4.5
7	Life of Pi	2012	23,981	439	54,626	5,894	454	12,983	4.2
8	Cirque du Soleil: Worlds Away	2013	148	186	793	8	40	201	3.9
9	Texas Chainsaw 3D	2013	1,922	270	7,117	74	40	1,841	3.9
10	The Darkest Hour	2012	1,188	340	3,495	136	137	989	3.5
11	Silent Hill: Revelation 3D	2012	1,602	318	5,038	247	169	1,464	3.4
12	Hansel & Gretel: Witch Hunters	2013	2,939	376	7,817	468	195	2,402	3.3
13	Kac Wawa	2012	54	42	1,282	16	40	402	3.2
14	Beauty and the Beast 3D	2012	2,648	365	7,253	339	137	2,472	2.9
15	I, Frankenstein	2014	1,170	359	3,260	222	189	1,175	2.8
16	Doctor Who: The Day of the Doctor	2013	1,777	407	4,366	58	33	1,764	2.5
17	Wrath of the Titans	2012	5,202	401	12,973	2,240	400	5,600	2.3
18	John Carter	2012	3,316	418	7,932	927	270	3,432	2.3
19	Raaz 3D	2012	132	16	8,269	70	19	3,674	2.3
20	Prometheus	2012	15,610	441	35,398	7,372	462	15,957	2.2

Source: Rentrak

Notes:

Box office gross = cumulative total up to 21 February 2016.

Includes films that were shown at a minimum of five 3D and five 2D sites.

The 3D and 2D box office grosses are shown rounded to the nearest £1,000, but site averages and ratios of site averages are calculated from unrounded data.

The 3D grosses do not include takings from IMAX screenings.

Data updated since publication of the 2015 Statistical Yearbook.

BEST WEEKEND PERFORMANCES OF UK FILMS

A total of 29 films topped the UK weekend box office charts over the course of 2015. Eleven of these were UK titles, which spent a total of 20 weeks at number one (Table 7). In 2014, six UK films achieved the number one slot in the weekend charts for a total of nine weeks.

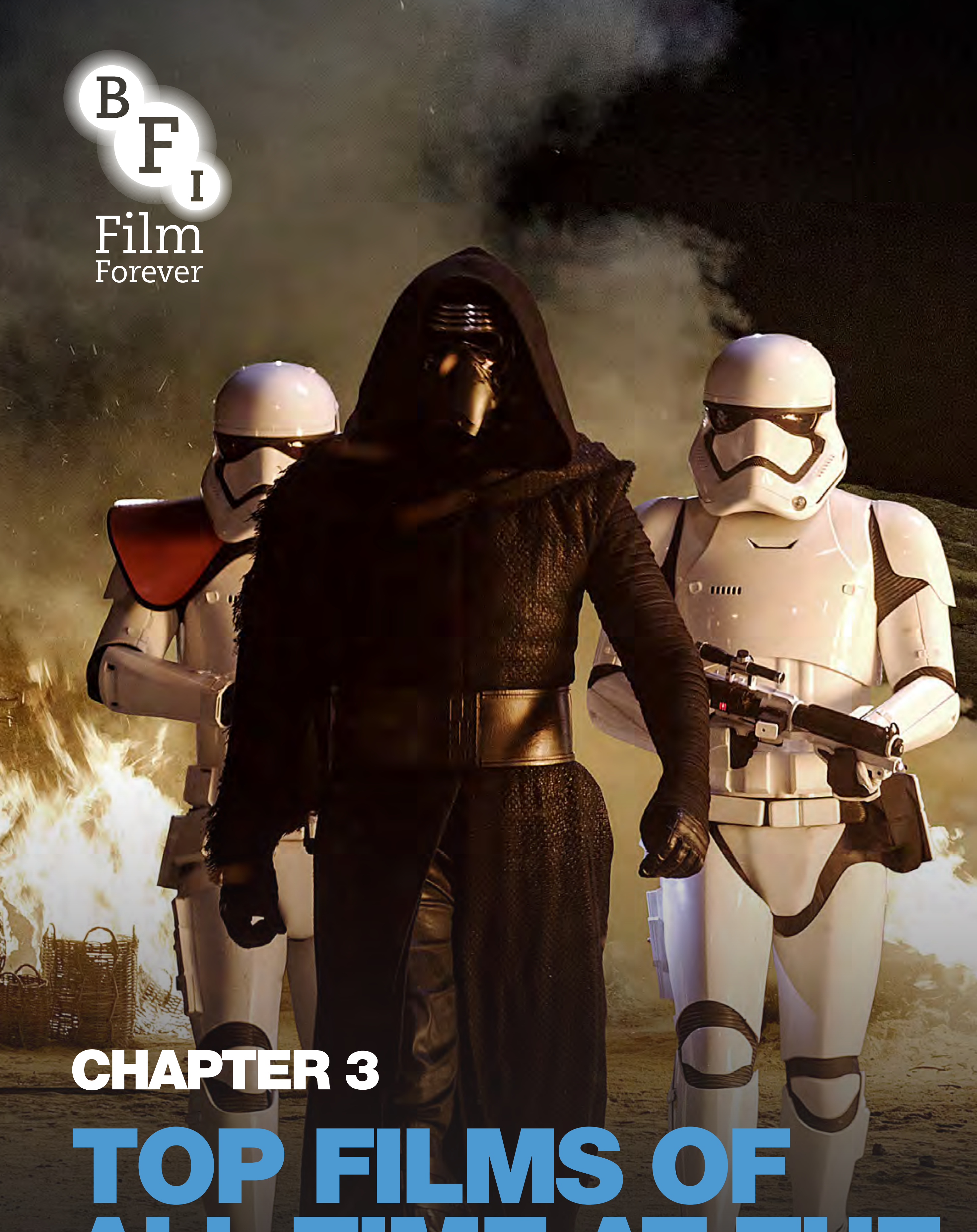
Three of the UK films, including the independent title *The Second Best Exotic Marigold Hotel*, topped the weekend charts for three consecutive weeks while a further three topped the charts for two weeks, although one of these, *Star Wars: The Force Awakens*, was to continue as the number one film in the weekend charts for a further two weeks in January 2016.

The Second Best Exotic Marigold Hotel and *Legend* were the only two UK independent films to hold the number one spot in 2015. Their combined four-week run matched the total achieved in 2014 by *The Inbetweeners 2* and *Paddington* which both held the top spot for two weeks.

Table 7 UK films at number one in the weekend box office charts, 2015

Title	First week at top	Opening weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
The Theory of Everything	02/01/2015	3.7	21.7	Universal	1
The Second Best Exotic Marigold Hotel	27/02/2015	3.8	16.0	20th Century Fox	3
Cinderella	27/03/2015	3.8	21.3	Walt Disney	1
Avengers: Age of Ultron	24/04/2015	18.0	48.3	Walt Disney	3
Ant-Man	17/07/2015	4.0	16.3	Walt Disney	1
Mission: Impossible – Rogue Nation	31/07/2015	5.4	21.2	Paramount	1
Legend	11/09/2015	5.2	18.4	StudioCanal	1
Everest	18/09/2015	3.2	10.7	Universal	2
The Martian*	02/10/2015	6.6	23.5	20th Century Fox	2
SPECTRE*	30/10/2015	41.3	95.2	Sony Pictures	3
Star Wars: The Force Awakens*+	18/12/2015	34.0	122.3	Walt Disney	2

Source: comScore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.
+ *Star Wars: The Force Awakens* continued at number one for a further two weeks in January 2016.



CHAPTER 3

TOP FILMS OF ALL TIME AT THE UK BOX OFFICE

Image: *Star Wars: The Force Awakens* ©2015 Lucasfilm Ltd. & TM. All Rights Reserved.

TOP FILMS OF ALL TIME AT THE UK BOX OFFICE

In 2015, *Star Wars: The Force Awakens* became the top earning film of all time at the UK box office, while titles based on UK characters and stories continue to dominate the chart with 12 of the top 20 highest grossing films.

FACTS IN FOCUS

- *Star Wars: The Force Awakens* has become the highest grossing film of all time in the UK, with box office earnings of over £122 million.
- Two other films released in 2015, *SPECTRE* and *Jurassic World*, also entered the top 20 list.
- The box office gross of *Star Wars: The Force Awakens* is enough to overtake *Titanic* for the top spot in the inflation-adjusted box office chart.
- Sequels and franchise films make up 17 of the all-time top 20 chart, whilst 10 are UK/USA collaborations.
- Four 2015 releases – *Legend*, *The Second Best Exotic Marigold Hotel*, *Shaun the Sheep the Movie* and *The Lady in the Van* – appear in the chart of all-time top independent UK films.

TOP 20 FILMS AT THE UK BOX OFFICE, 1989-2015

Table 1 shows the top 20 highest earning films of all time at the UK box office. After three years at the top of the chart, *Skyfall* was overtaken by the 2015 release *Star Wars: The Force Awakens*, which out-grossed the most successful James Bond outing to date by almost one fifth with a take of over £122 million. Two other releases from 2015 entered the top 20. The latest 007 adventure, *SPECTRE*, is third in the list with earnings of £95 million and *Jurassic World* is 10th with £64 million.

The list is dominated by franchise movies, including four of the eight Harry Potter titles and all three Lord of the Rings films. Only three of the top 20 films are neither sequels nor franchise titles, namely *Avatar* (although three sequels to this film remain in pre-production), *Mamma Mia!* and *Titanic*. Ten of the top 20 films are UK/USA collaborations and 12 of the top 20 are based on stories and characters created by UK writers such as Ian Fleming, JK Rowling and JRR Tolkien and the playwright Catherine Johnson, which shows the sustained appetite for home-grown material 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 report (however, some figures are adjusted for inflation). Most of this report relates to actual box office receipts from 1989 onwards (although coverage of box office figures for some high grossing 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 1 Top 20 films at the UK box office, 1989-2015

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	Star Wars: The Force Awakens*	UK/USA	122.3	Walt Disney	2015
2	Skyfall	UK/USA	103.2	Sony Pictures	2012
3	SPECTRE*	UK/USA	95.2	Sony Pictures	2015
4	Avatar	USA	94.0	20th Century Fox	2009
5	Titanic#	USA	80.3	20th Century Fox	1998/2012
6	Toy Story 3	USA	74.0	Walt Disney	2010
7	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
8	Mamma Mia!	UK/USA	68.6	Universal	2008
9	Harry Potter and the Philosopher's Stone	UK/USA	66.1	Warner Bros	2001
10	Jurassic World	USA	64.5	Universal	2015
11	Lord of the Rings: The Fellowship of the Ring	NZ/USA	63.0	Entertainment	2001
12	Lord of the Rings: The Return of the King	NZ/USA	61.1	Entertainment	2003
13	Lord of the Rings: The Two Towers	NZ/USA	57.6	Entertainment	2002
14	Star Wars Episode I: The Phantom Menace#	USA	56.4	20th Century Fox	1999/2012
15	The Dark Knight Rises	UK/USA	56.3	Warner Bros	2012
16	Casino Royale	UK/USA/ Czech	55.6	Sony Pictures	2006
17	Harry Potter and the Chamber of Secrets	UK/USA	54.8	Warner Bros	2002
18	Pirates of the Caribbean: Dead Man's Chest	USA	52.5	Walt Disney	2006
19	Harry Potter and the Deathly Hallows: Part 1	UK/USA	52.5	Warner Bros	2010
20	The Hobbit: An Unexpected Journey	NZ/USA	52.3	Warner Bros	2012

Source: comScore, BFI RSU analysis
Notes:
Figures have not been inflation adjusted.
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.
# The box office grosses for *Titanic* and *Star Wars Episode I: The Phantom Menace* include the grosses from their original releases plus the grosses from their 3D re-releases in 2012.

INFLATION-ADJUSTED TOP 20 FILMS AT THE UK BOX OFFICE, 1975-2015

Table 2 shows an inflation-adjusted box office chart based on the top 20 highest grossing films released in the UK since 1975 (when coverage of leading titles begins).

The £122 million earned by *Star Wars: The Force Awakens* is enough to retain its new top ranking even with inflation adjustment factored in. Its addition to the top 20 chart continues a trend from previous films in the Star Wars franchise, as the first instalment of both the original and prequel trilogies are top 20 titles with 1999's *Star Wars Episode I: The Phantom Menace* (£80 million) and 1977's now re-titled *Star Wars: A New Hope* (£76 million) in 11th and 17th places respectively. None of the subsequent instalments in the already completed trilogies make the inflation-adjusted top 40.

The previous inflation-adjusted top earning film was *Titanic*, which is now in second place with adjusted earnings of £111 million. *Skyfall* is in third place with £107 million and *Avatar* is fourth with £105 million. Another new entry in the chart is 2015's *SPECTRE* which takes fifth place with £95 million. Three of the four Daniel Craig era Bond films are in the inflation-adjusted top 20.

Harry Potter and the Philosopher's Stone is the highest placed of the three Harry Potter films in the list at number six, with inflation-adjusted earnings of £91 million. All three Lord of the Rings films make the chart with the top placed, *The Lord of the Rings: The Fellowship of the Ring*, seventh, with earnings of £87 million.

The 2015 release *Jurassic World*, with £65 million, falls just short of the top 20 whilst 1993's original instalment *Jurassic Park* is at number 14 with an adjusted gross of £78 million. *Jaws* (1975), the oldest release in the list, is in eighth place with £82 million whilst *Grease* (1978) is 19th with £70 million.

Table 2 Top 20 highest grossing films at the UK box office, 1975-2015 (inflation adjusted[1])

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	Star Wars: The Force Awakens*	UK/USA	122.3	Walt Disney	2015
2	Titanic#	USA	111.2	20th Century Fox	1998/2012
3	Skyfall	UK/USA	107.2	Sony Pictures	2012
4	Avatar	USA	104.5	20th Century Fox	2009
5	SPECTRE*	UK/USA	95.2	Sony Pictures	2015
6	Harry Potter and the Philosopher's Stone	UK/USA	91.1	Warner Bros	2001
7	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	86.8	Entertainment	2001
8	Jaws	USA	81.7	UIP	1975
9	Toy Story 3	USA	79.9	Walt Disney	2010
10	The Lord of the Rings: The Return of the King	USA/NZ	79.8	Entertainment	2003
11	Star Wars Episode I: The Phantom Menace#	USA	79.7	20th Century Fox	1999/2012
12	Mamma Mia!	UK/USA	78.9	Universal	2008
13	Harry Potter and the Deathly Hallows: Part 2	UK/USA	77.7	Warner Bros	2011
14	Jurassic Park	USA	77.5	UIP	1993
15	The Lord of the Rings: The Two Towers	USA/NZ	77.1	Entertainment	2002
16	The Full Monty	UK/USA	76.4	20th Century Fox	1997
17	Star Wars: A New Hope	USA	76.0	20th Century Fox	1977
18	Harry Potter and the Chamber of Secrets	UK/USA	73.6	Warner Bros	2002
19	Grease	USA	69.6	UIP	1978
20	Casino Royale	UK/USA/Czech	66.7	Sony Pictures	2006

Source: comScore, BFI RSU analysis
Notes:
[1] The 2015 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2015-quarterly-national-accounts.
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.
# The box office grosses for *Titanic* and *Star Wars Episode I: The Phantom Menace* include the grosses from their original releases plus the grosses from their 3D re-releases in 2012.

HIGHEST GROSSING FILMS OF THE YEAR AT THE UK BOX OFFICE, 2001-2015

Table 3 lists the highest grossing films of the year at the UK box office for the period 2001-2015. The record gross generated by the top earning film of 2015, *Star Wars: The Force Awakens*, reverses the downward trend seen in 2013 and 2014 whose highest earners, *The Hobbit: The Battle of the Five Armies* and *Despicable Me 2*, had the two lowest takings for a top film of the year in the 15 years covered in the table. (The years 2013 and 2014 were two of only four in the period which saw a decrease in year-on-year box office totals.) There was another downward trend in box office earnings by a top film of the year between 2001 and 2007 when the top gross fell from the £66 million taken by the first Harry Potter instalment to the £50 million earned by the fifth film in the series. The half-decade between 2008 and 2012 however, saw high and record breaking box office takings for a top earning film: *Skyfall* grossed £103 million in 2012, both *Harry Potter and the Deathly Hallows: Part 2* (2011) and *Toy Story 3* (2010) earned over £73 million, *Avatar* (2009) grossed £94 million and *Mamma Mia!* (2008) took £69 million.

Nine of the 15 top earning films of the year listed in the chart are UK/USA collaborations and 10 of the 15 titles are based on stories and characters created by UK writers.

Table 3 Highest grossing films of the year at the UK box office, 2001-2015

Year	Highest grossing film	Country of origin	UK box office total (£ million)	UK box office total (2015 £ million[1])
2001	Harry Potter and the Philosopher's Stone	UK/USA	66.1	91.1
2002	Harry Potter and the Chamber of Secrets	UK/USA	54.8	73.7
2003	The Lord of the Rings: The Return of the King	USA/NZ	61.1	79.9
2004	Shrek 2	USA	48.2	61.3
2005	Harry Potter and the Goblet of Fire	UK/USA	49.2	60.8
2006	Casino Royale	UK/USA/Cze	55.6	66.7
2007	Harry Potter and the Order of the Phoenix	UK/USA	49.9	58.2
2008	Mamma Mia!	UK/USA	68.6	77.7
2009	Avatar	USA	94.0	104.4
2010	Toy Story 3	USA	74.0	79.7
2011	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	77.2
2012	Skyfall	UK/USA	103.2	106.9
2013	Despicable Me 2	USA	47.5	48.4
2014	The Hobbit: The Battle of the Five Armies	USA/NZ	41.2	41.2
2015	Star Wars: The Force Awakens*	UK/USA	122.3	122.3

Source: comScore, BFI RSU analysis

Notes:

[1] See note to Table 2.

Box office gross = cumulative total up to 21 February 2016.

* Film still on release on 21 February 2016.

TOP 20 UK QUALIFYING FILMS AT THE UK BOX OFFICE, 1989-2015

The list of the all-time top 20 UK films is dominated by US studio-backed features but two independent films, *The King's Speech* and *The Inbetweeners Movie*, are at numbers 19 and 20 in the list (Table 4). There were three new entries to the list in 2015, including *Star Wars: The Force Awakens* in the number one spot and *SPECTRE* at number three. The addition of the most recent James Bond film means all of the films to star Daniel Craig appear in the top 20. With takings of £48 million the third highest earning UK qualifying film of 2015, *Avengers: Age of Ultron*, appears in the list at number 17. The top 20 is dominated by the Harry Potter franchise with all eight films appearing in the list. The final film in the series, *Harry Potter and the Deathly Hallows: Part 2*, is the highest ranked at number four.

Table 4 Top 20 UK qualifying films at the UK box office, 1989-2015

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	Star Wars: The Force Awakens*	UK/USA	122.3	Walt Disney	2015
2	Skyfall	UK/USA	103.2	Sony Pictures	2012
3	SPECTRE*	UK/USA	95.2	Sony Pictures	2015
4	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
5	Mamma Mia!	UK/USA	68.6	Universal	2008
6	Harry Potter and the Philosopher's Stone	UK/USA	66.1	Warner Bros	2001
7	The Dark Knight Rises	UK/USA	56.3	Warner Bros	2012
8	Casino Royale	UK/USA/ Czech	55.6	Sony Pictures	2006
9	Harry Potter and the Chamber of Secrets	UK/USA	54.8	Warner Bros	2002
10	Harry Potter and the Deathly Hallows: Part 1	UK/USA	52.5	Warner Bros	2010
11	The Full Monty	UK/USA	52.2	20th Century Fox	1997
12	Quantum of Solace	UK/USA	51.2	Sony Pictures	2008
13	Harry Potter and the Half-Blood Prince	UK/USA	50.7	Warner Bros	2009
14	Harry Potter and the Order of the Phoenix	UK/USA	49.9	Warner Bros	2007
15	Harry Potter and the Goblet of Fire	UK/USA	49.2	Warner Bros	2005
16	The Dark Knight	UK/USA	49.1	Warner Bros	2008
17	Avengers: Age of Ultron	UK/USA	48.3	Walt Disney	2015
18	Harry Potter and the Prisoner of Azkaban	UK/USA	46.1	Warner Bros	2004
19	The King's Speech	UK	45.7	Momentum	2011
20	The Inbetweeners Movie	UK	45.0	Entertainment	2011

Source: comScore, BFI RSU analysis
Notes:
Figures have not been inflation adjusted.
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.

TOP 20 INDEPENDENT UK FILMS AT THE UK BOX OFFICE, 1988-2015

Table 5 lists the top 20 all-time highest earning independent UK films (that is, made without US major studio involvement) at the UK box office between 1988-2015. The top two titles are both 2011 releases: *The King's Speech* and *The Inbetweeners Movie* each earned more than £45 million. There are three other films with grosses of more than £30 million, two from 2014 (*Paddington* and *The Inbetweeners 2*) and one from 2009 (*Slumdog Millionaire*).

Four releases from 2015 appear in the list. *Legend* is in ninth place with takings of £18.4 million, *The Second Best Exotic Marigold Hotel* is 11th with £16 million, *Shaun the Sheep the Movie* is 13th with £13.8 million and *The Lady in the Van* is 14th with £13 million.

Table 5 Top 20 independent UK films at the UK box office, 1988-2015

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	The King's Speech	UK	45.7	Momentum	2011
2	The Inbetweeners Movie	UK	45.0	Entertainment	2011
3	Paddington	UK/Fra	37.9	StudioCanal	2014
4	The Inbetweeners 2	UK	33.4	Entertainment	2014
5	Slumdog Millionaire	UK	31.7	Pathé	2009
6	Four Weddings and a Funeral	UK	27.8	Carlton	1994
7	The Woman in Black	UK/USA/Swe#	21.3	Momentum	2012
8	The Best Exotic Marigold Hotel	UK/USA/Ind#	20.4	20th Century Fox	2012
9	Legend	UK/Fra/USA	18.4	StudioCanal	2015
10	The Imitation Game	UK/USA#	16.4	StudioCanal	2014
11	The Second Best Exotic Marigold Hotel	UK/USA#	16.0	20th Century Fox	2015
12	Tinker, Tailor, Soldier, Spy	UK/Fra/Ger	14.2	StudioCanal	2011
13	Shaun the Sheep the Movie	UK/Fra	13.8	StudioCanal	2015
14	The Lady in the Van*	UK/USA#	13.0	Sony Pictures	2015
15	Trainspotting	UK	12.4	PolyGram	1996
16	Gosford Park	UK/USA#	12.3	Entertainment	2002
17	St Trinian's	UK	12.3	Entertainment	2007
18	A Fish Called Wanda	UK/USA#	12.0	UIP	1988
19	StreetDance 3D	UK/Ger/Ita	11.8	Vertigo Films	2010
20	Kick-Ass	UK/USA#	11.8	Universal	2010

Source: Source: comScore, BFI RSU analysis
Notes:
Figures have not been inflation adjusted.
Box office gross = cumulative total up to 21 February 2016.
* Film still on release on 21 February 2016.
# Film made with independent (non-studio) US support or with the independent arm of a US studio.

INFLATION-ADJUSTED TOP 20 INDEPENDENT UK FILMS AT THE UK BOX OFFICE, 1979-2015

Table 6 shows an inflation-adjusted box office chart based on the top 20 highest grossing independent UK films released at the UK box office since 1979 (when coverage of leading titles begins).

The two leading titles from the previous table, the 2011 releases *The King's Speech* and *The Inbetweeners Movie*, retain their first and second places in the inflation-adjusted chart with grosses of £48.3 million and £47.5 million respectively. *Four Weddings and a Funeral* (1994) is in third place with £44.3 million, *Paddington* (2014) is fourth with £37.9 million and *Slumdog Millionaire* (2009) is fifth with £35.2 million.

Five films released before 1990 appear in the top 20, with *A Fish Called Wanda* (1988) leading the pack in seventh place with an inflation-adjusted £25.6 million. The oldest release is *Monty Python's Life of Brian* (1979) which is in eighth place with £23.9 million. *Shirley Valentine* (1989) is in ninth place with £22.8 million, *Gandhi* (1982) is 10th with £22.3 million and *Flash Gordon* (1980) is 12th with £21.7 million.

Two releases from 2015 make the chart. *Legend* is in 15th place with £18.4 million and *The Second Best Exotic Marigold Hotel* is 18th with £16 million.

Table 6 Top 20 highest grossing independent UK films at the UK box office, 1979-2015 (inflation adjusted[1])

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	The King's Speech	UK	48.3	Momentum	2011
2	The Inbetweeners Movie	UK	47.5	Entertainment	2011
3	Four Weddings and a Funeral	UK	44.3	Carlton	1994
4	Paddington	UK/Fra	37.9	StudioCanal	2014
5	Slumdog Millionaire	UK	35.2	Pathé	2009
6	The Inbetweeners 2	UK	33.4	Entertainment	2014
7	A Fish Called Wanda	UK/USA#	25.6	UIP	1988
8	Monty Python's Life of Brian	UK	23.9	UIP	1979
9	Shirley Valentine	UK	22.8	UIP	1989
10	Gandhi	UK/Ind	22.3	Sony Pictures	1982
11	The Woman in Black	UK/USA/Swe#	22.2	Momentum	2012
12	Flash Gordon	UK	21.7	EMI	1980
13	The Best Exotic Marigold Hotel	UK/USA/Ind#	21.2	20th Century Fox	2012
14	Trainspotting	UK	18.6	PolyGram	1996
15	Legend	UK/Fra/USA#	18.4	StudioCanal	2015
16	Gosford Park	UK/USA#	16.6	Entertainment	2002
17	The Imitation Game	UK/USA#	16.4	StudioCanal	2014
18	The Second Best Exotic Marigold Hotel	UK/USA#	16.0	20th Century Fox	2015
19	Bend it Like Beckham	UK/Ger	15.5	Lionsgate	2002
20	Tinker, Tailor, Soldier, Spy	UK/Fra/Ger	15.0	StudioCanal	2011

Source: comScore, BFI RSU analysis

Notes:

[1] The 2015 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2015-quarterly-national-accounts.

Film made with independent (non-studio) US support or with the independent arm of a US studio.

CHAPTER 4

GENRE AND CLASSIFICATION

Image: *Shaun the Sheep the Movie* courtesy of StudioCanal

GENRE AND CLASSIFICATION

Action was the most popular genre among UK cinema-goers in 2015, with animation second and drama third. As in previous years, there were more ‘15’ releases than any other classification, but ‘12A’ films generated the largest single share of the box office.

FACTS IN FOCUS

- Action was the highest earning genre of 2015, taking 30% of the box office from 9% of releases. The top earning action title was *SPECTRE*.
- Drama accounted for the highest proportion of releases (26%) but shared only 10% of the box office. The top earning drama was *Fifty Shades of Grey*.
- Sci-fi took more money per cinema on average than other genres due mainly to the record-breaking success of the top film of the year, *Star Wars: The Force Awakens*.
- Ten of the top performing films by genre were UK qualifying films, including the top biopic, top fantasy and top documentary releases.
- Action was also the highest earning genre for UK qualifying films (39% of total box office from 9% of releases).
- Drama was the highest earning genre for UK independent films (27% of total box office from 23% of releases).

GENRE

For statistical purposes, the BFI Research and Statistics Unit assigns a primary genre to every film released in the UK. 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 BFI's Collections Information Database, the British Board of Film Classification (BBFC), the Internet Movie Database (IMDb) and distributors' websites.

GENRE OF ALL FILM RELEASES

Table 1 shows the relative popularity of different genres at the box office in the UK and Republic of Ireland in 2015. The pattern of box office by genre each year is usually determined by a small number of high grossing releases. Action, which included the second biggest film of the year, *SPECTRE*, was the top earning genre with a combined gross of £394 million. Animation was the second highest earner with a combined gross of £210 million and sci-fi, due mainly to the success of the year's top film, *Star Wars: The Force Awakens*, was third with £141 million. Drama films had the highest proportion of releases (26%) but earned only 10% of the total box office gross.

All but six of the top performing titles by genre illustrated in the Table are UK films, which highlights the variety of story types of successful British films.

Table 1 Films released in the UK and Republic of Ireland by genre, 2015 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Action	72	9.5	393.9	30.3	SPECTRE
Animation	29	3.8	210.0	16.2	Minions
Sci-fi	18	2.4	141.0	10.9	Star Wars: The Force Awakens
Comedy	166	21.9	135.1	10.4	Pitch Perfect 2
Drama	201	26.5	130.2	10.0	Fifty Shades of Grey
Biopic	10	1.3	83.4	6.4	The Theory of Everything
Adventure	12	1.6	75.9	5.8	The Hunger Games: Mockingjay – Part 2
Thriller	52	6.9	37.1	2.9	Taken 3
Horror	44	5.8	34.9	2.7	The Woman in Black: Angel of Death
Fantasy	1	0.1	21.3	1.6	Cinderella
Romance	12	1.6	12.8	1.0	Brooklyn
Music/dance	9	1.2	12.0	0.9	Into the Woods
Documentary	117	15.4	8.3	0.6	Amy
Crime	11	1.4	1.4	0.1	The Gambler
Western	2	0.3	0.6	<0.1	Slow West
Family	3	0.4	0.2	<0.1	A Christmas Star
Total	**759**	**100.0**	**1,298.4**	**100.0**	

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Figures/percentages may not sum to totals due to rounding.
Figures as at 21 February 2016.

The pattern of genres ranked by the average number of sites at the widest point of release (WPR) is shown in Table 2. The top genre by average WPR in 2015 was fantasy but this is based on the release of only one highly promoted US studio-backed title, *Cinderella* (WPR of 585). Biopic was next but again this was based on a low number of releases (10), including *The Theory of Everything*, *Legend* and *American Sniper* (WPRs of 559, 565 and 483 respectively). The third placed genre by average WPR was animation, whose titles included *Minions*, *Inside Out* and *Home* (WPRs of 609, 632 and 561). *Star Wars: The Force Awakens* had the highest individual WPR (684) of all 2015 releases.

At the opposite end of the scale, the average WPR for the documentary genre was 27, although it had the third highest number of releases, at 117 films. The documentary releases with the highest individual WPRs in 2015 were *Amy*, *Roger Waters The Wall* and *Cobain: Montage of Heck* (WPRs of 280, 432 and 85 respectively).

Table 2 Films released in the UK and Republic of Ireland by genre, 2015 (ranked by average widest point of release)

Genre	Average number of sites at widest point of release	Number of releases	Gross box office (£ million)
Fantasy	585	1	21.3
Biopic	403	10	83.4
Animation	283	29	210.0
Adventure	279	12	75.9
Action	191	72	393.9
Sci-fi	180	18	141.0
Romance	148	12	12.8
Horror	122	44	34.9
Music/dance	114	9	12.0
Comedy	93	166	135.1
Western	89	2	0.6
Thriller	86	52	37.1
Drama	76	201	130.2
Crime	61	11	1.4
Family	52	3	0.2
Documentary	27	117	8.3
Total	**106**	**759**	**1,298.4**

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Figures may not sum to totals due to rounding.
Figures as at 21 February 2016.

Table 3 shows box office revenues per site by genre, which gives a good indication of performance in the market while controlling for the size of release. Sci-fi tops this list largely due to the success of *Star Wars: The Force Awakens*. The fantasy genre is second due solely to the performance of *Cinderella*, and action, which includes the second highest earning film of the year, *SPECTRE*, is third. Drama and comedy, the two genres with the greatest number of releases, were much lower placed when the average box office per site is taken into account, indicating a long tail of less able performers in each genre.

Table 3 Films released in the UK and Republic of Ireland by genre, 2015 (ranked by average box office gross per site)

Genre	Average box office per site (£)	Gross box office (£ million)	Total sites
Sci-fi	43,461	141.0	3,245
Fantasy	36,413	21.3	585
Action	28,708	393.9	13,722
Animation	25,608	210.0	8,202
Adventure	22,697	75.9	3,346
Biopic	20,692	83.4	4,030
Music/dance	11,687	12.0	1,030
Comedy	8,767	135.1	15,411
Drama	8,514	130.2	15,295
Thriller	8,301	37.1	4,475
Romance	7,241	12.8	1,770
Horror	6,493	34.9	5,375
Western	3,452	0.6	177
Documentary	2,618	8.3	3,187
Crime	2,159	1.4	671
Family	1,049	0.2	156
All genres	**16,094**	**1,298.4**	**80,677**

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Total sites = number of releases multiplied by average number of sites at widest point of release.
Figures may not sum to totals due to rounding.
Figures as at 21 February 2016.

GENRE OF UK AND UK INDEPENDENT FILM RELEASES

Action topped the box office by genre chart for all UK qualifying films released in 2015 mainly due to the success of a number of high earning US studio-backed films, including *SPECTRE*, *Avengers: Age of Ultron* and *Mission: Impossible – Rogue Nation* (Table 4). This genre took £223 million at the box office from 19 releases, while sci-fi, which is second in the list, took £125 million from eight releases. However, the majority (just under 98%) of the total box office for sci-fi was earned by just one title, *Star Wars: The Force Awakens*.

Documentary had more releases (54) than any of the other genres, but took just 1% of overall box office receipts. The top documentary, *Amy*, earned 65% of the total box office for all UK documentaries.

Table 4 UK qualifying films released in the UK and Republic of Ireland by genre, 2015 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Action	19	9.1	223.2	38.5	SPECTRE
Sci-fi	8	3.8	125.3	21.6	Star Wars: The Force Awakens
Biopic	4	1.9	53.5	9.2	The Theory of Everything
Adventure	4	1.9	43.6	7.5	The Martian
Drama	44	21.1	39.1	6.7	Suffragette
Comedy	25	12.0	24.3	4.2	The Second Best Exotic Marigold Hotel
Fantasy	1	0.5	21.3	3.7	Cinderella
Animation	4	1.9	16.7	2.9	Shaun the Sheep the Movie
Music/dance	4	1.9	10.3	1.8	Into the Woods
Horror	11	5.3	6.0	1.0	The Woman in Black: Angel of Death
Romance	4	1.9	6.0	1.0	Brooklyn
Documentary	54	25.8	5.8	1.0	Amy
Thriller	18	8.6	3.8	0.7	Spooks: The Greater Good
Western	2	1.0	0.6	0.1	Slow West
Family	1	0.5	0.1	<0.1	A Christmas Star
Crime	6	2.9	<0.1	<0.1	The Long Good Friday
Total	**209**	**100.0**	**579.8**	**100.0**	

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Percentages may not sum to 100 due to rounding.
Figures as at 21 February 2016.

As Table 5 shows, drama was the most popular genre for independent UK films, which made up the majority of UK film releases (87%). The £36 million earned by drama films (41 releases) represented 27% of the total box office for all UK independent films. Over half (53%) of the drama genre's total box office was earned by the year's top three UK independent drama releases – *Suffragette, Far from the Madding Crowd* and *Macbeth*. Biopic was the second highest earning genre with £32 million from three releases, and comedy was third with £24 million from 25 releases. *Legend*, the top earning biopic, accounted for 58% of the total box office for this genre, while the top earning comedy, *The Second Best Exotic Marigold Hotel*, accounted for 66% of this genre's total gross.

Table 5 UK independent films released in the UK and Republic of Ireland by genre, 2015 (ranked by gross box office)

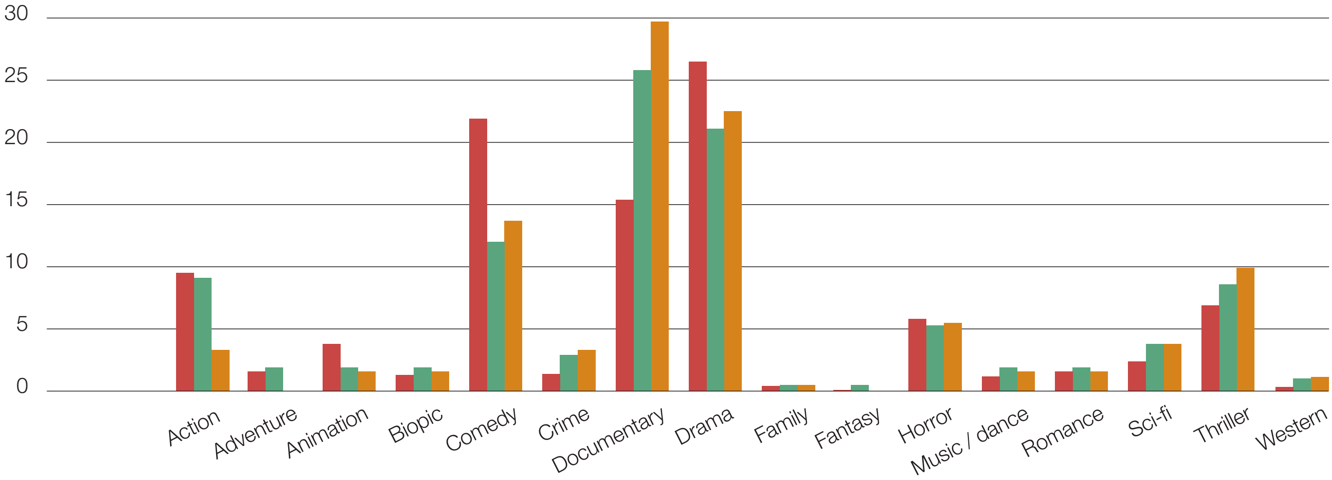
Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Drama	41	22.5	36.4	26.7	Suffragette
Biopic	3	1.6	31.8	23.4	Legend
Comedy	25	13.7	24.3	17.8	The Second Best Exotic Marigold Hotel
Animation	3	1.6	16.1	11.8	Shaun the Sheep the Movie
Documentary	54	29.7	5.8	4.3	Amy
Romance	3	1.6	5.7	4.2	Brooklyn
Horror	10	5.5	5.1	3.8	The Woman in Black: Angel of Death
Thriller	18	9.9	3.8	2.8	Spooks: The Greater Good
Sci-fi	7	3.8	3.0	2.2	Ex Machina
Action	6	3.3	2.8	2.1	Big Game
Western	2	1.1	0.6	0.4	Slow West
Music/dance	3	1.6	0.5	0.3	London Road
Family	1	0.5	0.1	0.1	A Christmas Star
Crime	6	3.3	<0.1	<0.1	The Long Good Friday
Total	**182**	**100.0**	**136.0**	**100.0**	

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Percentages/figures may not sum to totals due to rounding.
Figures as at 21 February 2016.

Looking at UK films and UK independent films released in 2015, we see mainly similar rankings to those for all films in terms of percentages of releases by genre, but differences in the share of box office by genre (Figures 1 and 2). Comedy, drama and documentary were the most popular genres in terms of numbers of releases for all three categories, but UK films and UK independent films had higher proportions of documentaries compared with all films, and all films had a higher proportion of both comedy and drama films compared with the other two categories.

However, when looking at box office by genre, there are some differences between the three categories (Tables 1, 4 and 5). For all films and UK films, action was the highest earning genre taking 30% and 39% of total box office respectively, while drama was the highest earning genre for UK independent films (27%). The categories differ for the next highest earning genres: for all films, animation was the second highest earner with 16% of the total box office, sci-fi was in second place for UK films (22% of total box office) and for UK independent films, biopic was second (23% of total box office). The third highest earning genre also differed across the three categories: for all films it was sci-fi (11%), for UK films it was biopic (9%), and for UK independent films it was comedy (18%).

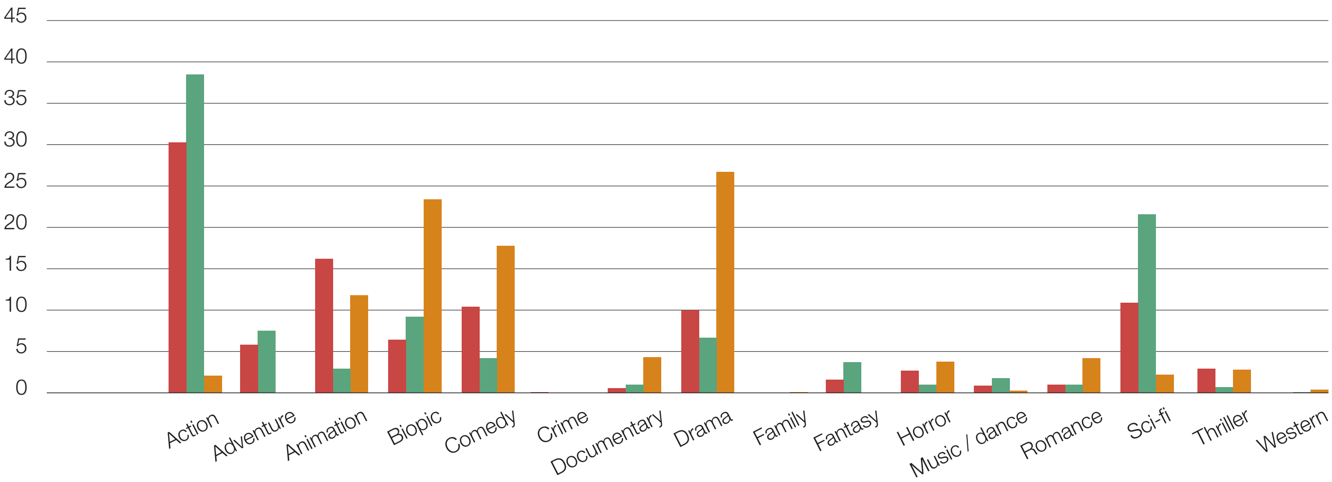
Figure 1 Proportion of releases by genre for all films, UK films and UK independent films, 2015



	Action	Adventure	Animation	Biopic	Comedy	Crime	Documentary	Drama	Family	Fantasy	Horror	Music / dance	Romance	Sci-fi	Thriller	Western
All films	9.5	1.6	3.8	1.3	21.9	1.4	15.4	26.5	0.4	0.1	5.8	1.2	1.6	2.4	6.9	0.3
UK films	9.1	1.9	1.9	1.9	12.0	2.9	25.8	21.1	0.5	0.5	5.3	1.9	1.9	3.8	8.6	1.0
UK independent films	3.3	-	1.6	1.6	13.7	3.3	29.7	22.5	0.5	-	5.5	1.6	1.6	3.8	9.9	1.1

Source: comScore, BBFC, IMDb, BFI RSU analysis

Figure 2 Proportion of box office by genre for all films, UK films and UK independent films, 2015



	Action	Adventure	Animation	Biopic	Comedy	Crime	Documentary	Drama	Family	Fantasy	Horror	Music / dance	Romance	Sci-fi	Thriller	Western
All films	30.3	5.8	16.2	6.4	10.4	0.1	0.6	10.0	<0.1	1.6	2.7	0.9	1.0	10.9	2.9	<0.1
UK films	38.5	7.5	2.9	9.2	4.2	<0.1	1.0	6.7	<0.1	3.7	1.0	1.8	1.0	21.6	0.7	0.1
UK independent films	2.1	-	11.8	23.4	17.8	<0.1	4.3	26.7	0.1	-	3.8	0.3	4.2	2.2	2.8	0.4

Source: comScore, BBFC, IMDb, BFI RSU analysis

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) provides age ratings for the majority of films aimed at 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 6.

Table 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

RELEASES AND BOX OFFICE BY CLASSIFICATION

Table 7 provides a picture of how 2015 releases were classified. It shows that, as in previous years, more '15' films (45%) were released than any other category, but the largest share of box office gross was earned by '12A' films which, at 56% was the largest share since records our began. The proportion of releases for both '15' and '12A' films (31%) was higher than in 2014 (43% and 30% respectively). Films classified as '15' in 2015 accounted for 19% of the overall box office gross, down from 27% in 2014.

Table 7 All releases in the UK and Republic of Ireland by BBFC film classification, 2015

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	40	5.3	195.4	15.1	Minions
PG	81	10.7	81.4	6.3	Big Hero 6
12A	236	31.1	723.7	55.7	Star Wars: The Force Awakens
15	340	44.8	242.6	18.7	Mad Max: Fury Road
18	52	6.9	55.2	4.3	Fifty Shades of Grey
No classification	10	1.3	0.1	<0.1	Get Up and Go
Total	**759**	**100.0**	**1,298.4**	**100.0**	

Source: comScore, BBFC, BFI RSU analysis
Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Figures as at 21 February 2016.
Percentages may not sum to totals due to rounding.

Table 8 shows the breakdown of classifications for UK films released in 2015, and Table 9 shows the breakdown for UK independent films. The proportions of films released by BBFC classification were similar for all films, UK films and independent UK films (except that for UK films and UK independent films there was a greater proportion of '15' films than for all films, and for all films there was a compensating higher proportion of '12A' releases compared with the other two categories), but there were differences in box office takings by classification between the three categories (Figure 3).

Table 8 Releases of UK films in the UK and Republic of Ireland by BBFC film classification, 2015

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	9	4.3	38.1	6.6	Cinderella
PG	24	11.5	39.1	6.7	The Second Best Exotic Marigold Hotel
12A	59	28.2	435.9	75.2	Star Wars: The Force Awakens
15	95	45.5	47.8	8.2	Kingsman: The Secret Service
18	22	10.5	18.9	3.3	Legend
Total	**209**	**100.0**	**579.8**	**100.0**	

Source: comScore, BBFC, BFI RSU analysis.
Note: Figures as at 21 February 2016.

Table 9 Releases of UK independent films in the UK and Republic of Ireland by BBFC film classification, 2015

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	6	3.3	16.2	11.9	Shaun the Sheep the Movie
PG	19	10.4	19.9	14.6	The Second Best Exotic Marigold Hotel
12A	43	23.6	49.9	36.7	The Lady in the Van
15	92	50.5	31.0	22.8	The Woman in Black: Angel of Death
18	22	12.1	18.9	13.9	Legend
Total	**182**	**100.0**	**136.0**	**100.0**	

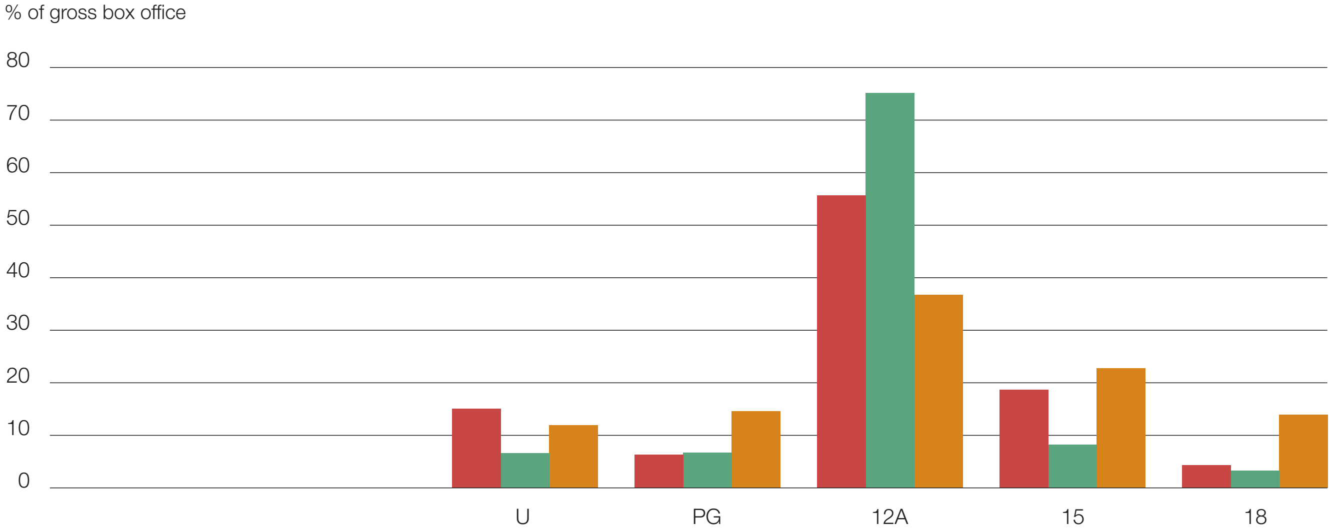
Source: comScore, BBFC, BFI RSU analysis
Notes:
Figures as at 21 February 2016.
Figures/percentages may not sum to totals due to rounding.

Figure 3 shows that for all films, UK films and UK independent films, the highest earning classification was ‘12A’ followed by ‘15’. Films with a ‘12A’ classification generated 56% of the total box office for all films, 75% of the total box office for UK films and 37% for UK independent films. Eleven of the 20 highest earning films in 2015 were ‘12A’ titles, including the top two grossing films of the year, *Star Wars: The Force Awakens* and *SPECTRE*, both of which were UK qualifying films. The top earning UK independent film with a ‘12A’ rating was *The Lady in the Van*, which was among the year’s top 30 highest grossing films.

UK independent films earned a larger proportion of their overall box office from the ‘PG’, ‘15’ and ‘18’ classifications than the other two categories in 2015. The top earning independent UK films in each of these classifications shows how the pattern of box office by rating each year is usually determined by a small number of high grossing releases. *The Second Best Exotic Marigold Hotel* earned 80% of the total box office for ‘PG’ rated independent UK films, the combined grosses of *The Woman in Black: Angel of Death* and *Amy* made up 28% of the total box office for ‘15’ rated independent UK films, and *Legend* earned 73% of the category’s total box office for ‘18’ rated releases.

The ‘U’ classification generated a larger proportion of total box office for all films compared with UK films and UK independent films. ‘U’ rated releases included a significant number of high earning animated titles from the US majors including *Minions*, *Inside Out* and *Home*.

Figure 3 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2015

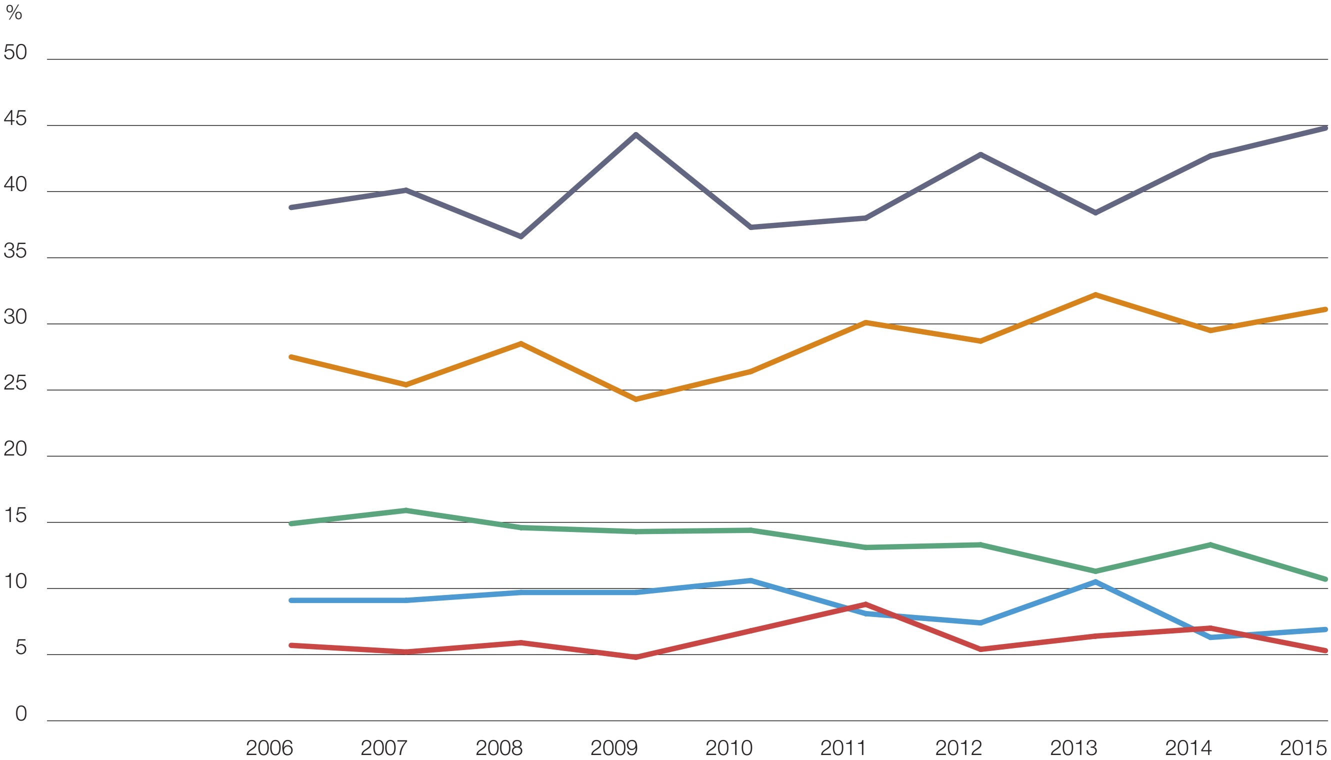


	U	PG	12A	15	18
All films	15.1	6.3	55.7	18.7	4.3
UK films	6.6	6.7	75.2	8.2	3.3
UK independent films	11.9	14.6	36.7	22.8	13.9

Source: comScore, BBFC, BFI RSU analysis
Figures as at 21 February 2016.

There has been some gradual change in the proportions of releases by classification over the last 10 years, as shown in Figure 4. The share of releases for the most common classification, '15', has mainly been around 40%, but was as high as 45% in 2015. The second and third most common classifications 'PG' and '12A' have together accounted for over 40% of releases for most of the period. During that time, these classifications have diverged with the slow decline in the 'PG' classification being compensated by a rising trend in the '12A' rating. The 'U' and '18' classifications have consistently accounted for the smallest percentages of releases since 2006. In 2011 and 2014 there were slightly more 'U' films released than '18' films, but in all other years more '18' films than 'U' films have been released.

Figure 4 Percentage of releases in the UK and Republic of Ireland by film classification, 2006-2015

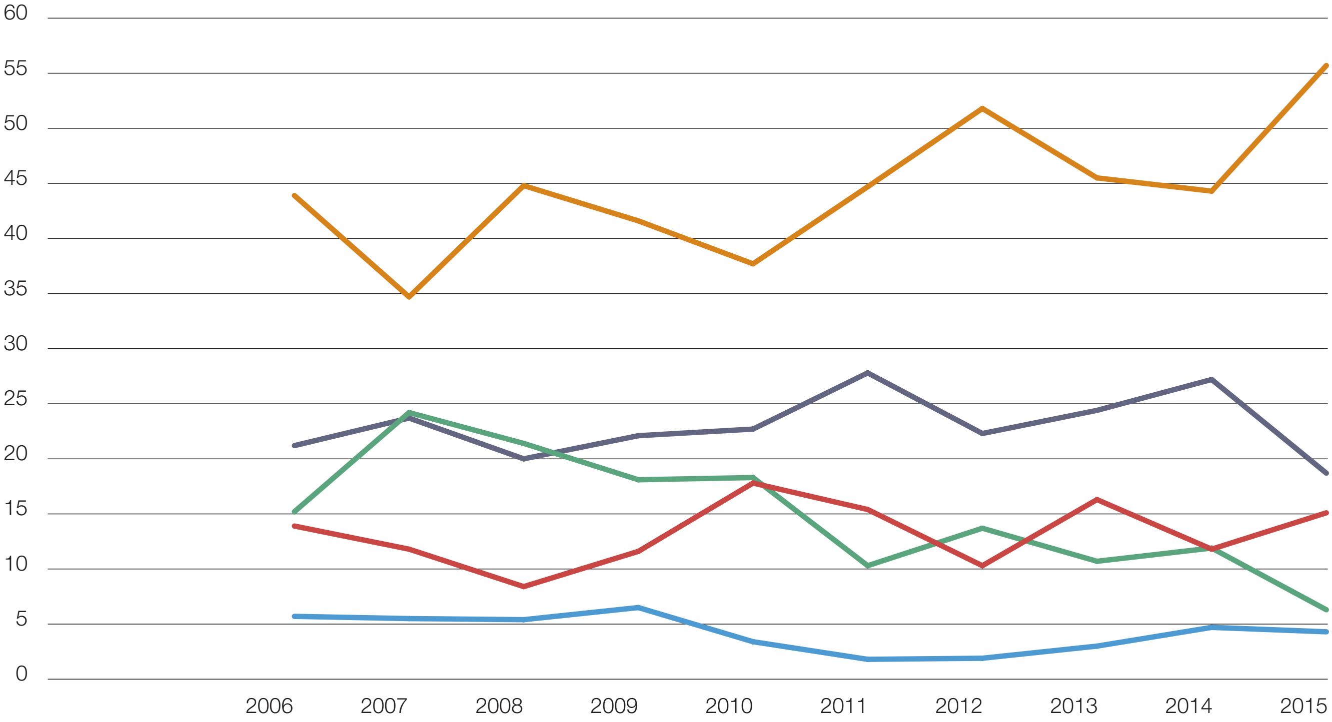


	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
U	5.7	5.2	5.9	4.8	6.8	8.8	5.4	6.4	7.0	5.3
PG	14.9	15.9	14.6	14.3	14.4	13.1	13.3	11.3	13.3	10.7
12A	27.5	25.4	28.5	24.3	26.4	30.1	28.7	32.2	29.5	31.1
15	38.8	40.1	36.6	44.3	37.3	38.0	42.8	38.4	42.7	44.8
18	9.1	9.1	9.7	9.7	10.6	8.1	7.4	10.5	6.3	6.9

Source: comScore, BBFC, BFI RSU analysis

The shares of box office by film classification vary from year to year as demonstrated in Figure 5. However, the box office ranking of the classifications has remained fairly constant over time; the top earner being ‘12A’, with ‘U’ and ’18’ typically being the lowest earners. However, there has been an overall downward trend for box office share for the ‘PG’ classification: in the first half of the period these films were vying for second and third place with ‘15’ films, but as the chart shows, in the second half of the period they were in competition with ‘U’ films for third and fourth place. The decline in ‘PG’ films has been compensated by a rising trend in share for ‘12A’ films. In 2015, the share for PG films, at 6%, was the lowest of the period, while the share for ‘12A’ films, at 56%, was the highest.

Figure 5 Percentage of gross box office of releases in the UK and Republic of Ireland by film classification, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
U	13.9	11.8	8.4	11.6	17.8	15.4	10.3	16.3	11.8	15.1
PG	15.2	24.2	21.4	18.1	18.3	10.3	13.7	10.7	11.9	6.3
12A	43.9	34.7	44.8	41.6	37.7	44.7	51.8	45.5	44.3	55.7
15	21.2	23.7	20	22.1	22.7	27.8	22.3	24.4	27.2	18.7
18	5.7	5.5	5.4	6.5	3.4	1.8	1.9	3.0	4.7	4.3

Source: comScore, BBFC, BFI RSU analysis

Notes

See note to Figure 4.

Figures as at 21 February 2016.

TOP FILMS BY CLASSIFICATION

Table 10 shows the top 10 ‘U’ classified films at the box office in the UK and Republic of Ireland in 2015. Animation, which is traditionally aimed at the youngest audiences, is the most popular genre in the list with nine of the top 10 titles. Six of the animations were released in both 3D and 2D and 15% of the total box office for these films was earned from 3D screenings.

The top five ‘U’ classified titles also feature in the list of top 20 best performing films of the year. There are three UK qualifying films in the list, up from two in 2014.

Table 10 Top 10 ‘U’ classified films, 2015

	Title	Country of origin	Gross box office (£ million)	Distributor	Genre
1	Minions*	USA	47.7	Universal	Animation
2	Inside Out*	USA	39.3	Walt Disney	Animation
3	Home	USA	25.4	20th Century Fox	Animation
4	Cinderella	UK/USA	21.3	Walt Disney	Fantasy
5	Hotel Transylvania 2	USA	20.4	Sony Pictures	Animation
6	Shaun the Sheep the Movie	UK/Fra	13.8	StudioCanal	Animation
7	Snoopy and Charlie Brown: The Peanuts Movie	USA	9.9	20th Century Fox	Animation
8	The SpongeBob Movie: Sponge out of Water	USA	8.6	Paramount	Animation
9	Two by Two	Ger/Bel/Lux/Ire/USA	3.2	eOne Films	Animation
10	Thomas & Friends: Sodor’s Legend of the Lost Treasure	UK	0.6	National Amusements	Animation

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Figures as at 21 February 2016.
* Film still on release on 21 February 2016.

The highest earning release in the top 10 ‘PG’ classified films in 2015 was another animated feature, but the list includes four other genres (Table 11). Comedy was the most popular genre with four releases. Four of the films in the list were shown in both 3D and 2D, and 15% of the box office for these films was earned at 3D screenings. *The Walk*, at 45%, generated the highest percentage of its total box office gross from 3D screenings. Five UK qualifying films appear in the list, up from three in 2014.

Table 11 Top 10 ‘PG’ classified films, 2015

	Title	Country of origin	Gross box office (£ million)	Distributor	Genre
1	Big Hero 6	USA	20.7	Walt Disney	Animation
2	The Second Best Exotic Marigold Hotel	UK/USA	16.0	20th Century Fox	Comedy
3	The Good Dinosaur	USA	14.8	Walt Disney	Animation
4	Into the Woods	UK/USA/Can	9.9	Walt Disney	Music/dance
5	Pan*	UK/USA/Aus	9.2	Warner Bros	Adventure
6	Mr Holmes	UK	2.7	eOne Films	Drama
7	Paul Blart: Mall Cop 2	USA	1.6	Sony Pictures	Comedy
8	The Walk	USA	1.4	Sony Pictures	Drama
9	Bill	UK	0.6	Vertigo	Comedy
10	Tamasha	Ind	0.5	UTV Motion Pictures	Comedy

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Figures as at 21 February 2016.
* Film still on release on 21 February 2016.

Half of the releases in the top 10 ‘12A’ classified films list are action titles (Table 12). The top film in the list is the highest earning film of 2015, *Star Wars: the Force Awakens*, and all of the films in the list appear in the top 20 highest grossing films of the year. Six UK qualifying films feature in the list, compared with one in 2014.

Table 12 Top 10 ‘12A’ classified films, 2015

	Title	Country of origin	Gross box office (£ million)	Distributor	Genre
1	Star Wars: The Force Awakens*	UK/USA	122.3	Walt Disney	Sci-fi
2	SPECTRE*	UK/USA	95.2	Sony Pictures	Action
3	Jurassic World	USA	64.5	Universal	Action
4	Avengers: Age of Ultron	UK/USA	48.3	Walt Disney	Action
5	Fast & Furious 7	USA	38.6	Universal	Action
6	The Hunger Games: Mockingjay – Part 2	USA/Ger	29.2	Lionsgate	Adventure
7	The Martian*	UK/USA	23.5	20th Century Fox	Adventure
8	The Theory of Everything	UK	21.7	Universal	Biopic
9	Mission: Impossible – Rogue Nation	UK/USA	21.2	Paramount	Action
10	Taken 3	Fra	17.8	20th Century Fox	Thriller

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
Figures as at 21 February 2016.
* Film still on release on 21 February 2016.

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 and violence. This is reflected in the top 10 for 2015, where comedy is the most common genre with four titles, including *Spy* and *Ted 2*, and action is the top earning genre with *Mad Max: Fury Road* and *Kingsman: The Secret Service* (Table 13). *Mad Max: Fury Road* is the only title in the list to also appear in the top 20 highest grossing films of the year. One UK qualifying film appears in the top 10, down from three in 2014.

Table 13 Top 10 '15' classified films, 2015

	Title	Country of origin	Gross box office (£ million)	Distributor	Genre
1	Mad Max: Fury Road	USA/Aus	17.4	Warner Bros	Action
2	Kingsman: The Secret Service	UK/USA	16.6	20th Century Fox	Action
3	American Sniper	USA	13.7	Warner Bros	Biopic
4	Spy	USA	10.1	20th Century Fox	Comedy
5	Ted 2	USA	10.0	Universal	Comedy
6	Southpaw	USA	8.7	Entertainment	Drama
7	Straight Outta Compton	USA	8.2	Universal	Biopic
8	Focus	USA/Arg	7.4	Warner Bros	Comedy
9	Magic Mike XXL	USA	6.9	Warner Bros	Drama
10	Birdman	USA	6.1	20th Century Fox	Comedy

Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 21 February 2016.

Films classified as '18' generally appeal to a narrower audience than other classifications due to their strong content. In recent years, it has been rare for an '18' classified film to break the £10 million barrier, but in 2013 *Django Unchained* grossed more than £15 million and in 2014 *The Wolf of Wall Street* and *Gone Girl* each earned more than £22 million. In 2015, *Fifty Shades of Grey* grossed just over £35 million to become the highest earning '18' certified film of all time at the UK box office (Table 14). Unusually, the top earning UK independent title of the year was an '18' film. *Legend* was the only other release in this category to gross more than £1 million and was one of three UK qualifying films in the top 10. There were two UK films in the top 10 '18' films in 2014.

Table 14 Top 10 ‘18’ classified films, 2015

	Title	Country of origin	Gross box office (£ million)	Distributor	Genre
1	Fifty Shades of Grey	USA	35.1	Universal	Drama
2	Legend	UK/Fra	18.4	StudioCanal	Biopic
3	Knock Knock	USA	0.5	Entertainment	Thriller
4	The Diary of a Teenage Girl	USA	0.3	Vertigo	Drama
5	Kill Your Friends	UK	0.2	StudioCanal	Comedy
6	The Duke of Burgundy	UK/Hun	0.2	Curzon Artificial Eye	Drama
7	The Queen Of Ireland	Ire	<0.1	Universal	Documentary
8	Love	Fra	<0.1	Curzon Artificial Eye	Drama
9	Good People	UK	<0.1	Lionsgate	Thriller
10	True Romance	USA	<0.1	Park Circus	Drama

Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 21 February 2016.

CHAPTER 5

SPECIALISED FILMS

Image: *Bajrangi Bhaijaan* courtesy of Eros International

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 2015, they made up six in 10 films released in the UK and grossed £48 million.

FACTS IN FOCUS

- A total of 456 specialised films were released in the UK in 2015 (60% of all films released) earning £48 million (3.7% of the total box office).
- Films in 38 different languages (including English and Welsh) were released in the UK in 2015. There were three releases with no spoken dialogue.
- The 277 foreign language films released in the year accounted for 37% of all releases, but shared just 2% of the UK box office.
- Hindi was the top earning non-English language at the UK box office; the highest earning foreign language film was *Bajrangi Bhaijaan* (in Hindi) which grossed £2.7 million.
- A total of 117 documentary films were released, accounting for 15% of releases but just 0.6% of the total box office. *Amy* became the highest grossing non-concert UK documentary of all time at the UK box office with takings of £3.8 million.
- There were 38 re-releases (5% of the total), accounting for 0.2% of the overall box office.

ABOUT SPECIALISED FILMS

The BFI considers most feature documentaries, subtitled foreign language films and re-releases of archive/classic films to be specialised. In recent years some mainstream films, which were originally made and shown in 2D, have been 're-released' in the 3D format. Examples include the original *Toy Story* (released in 3D in 2009), *The Lion King* (2011) and *Beauty and the Beast*, *Star Wars: Episode 1 – The Phantom Menace* and *Titanic* (all released in 3D in 2012). These 're-releases' are not considered as specialised films in the present analyses.

Other films that do not fall into the above categories may also be considered as specialised. Generally described as films with a distinctive genre, hook or style, these releases may be less easy to define as a particular genre or may deal with more complex and challenging subject matter than the majority of mainstream films. 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 rather than effects and star names and may be expected to appeal to a narrower audience segment than mainstream films. (Non-feature film releases, such as recorded live performances, are not considered to be specialised; they are categorised as event cinema. For more information, see the Exhibition report.)

SPECIALISED FILMS AT THE UK BOX OFFICE IN 2015

In total, 456 specialised films were released in 2015, representing 60% of all UK theatrical releases in the year (Table 1). These films grossed £48 million, a 3.7% share of total box office earnings. However, documentaries (0.6%), foreign language films (2%) and re-releases (0.2%) took very small shares of overall box office revenues.

Table 1 Specialised films in the UK and Republic of Ireland, 2015

Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	117	15.4	8.3	0.6	27
Foreign language	277	36.8	25.6	2.0	19
Re-release	38	5.0	2.0	0.2	40
Other specialised	52	6.7	13.1	1.0	56
All specialised films*	456	60.1	48.0	3.7	27
All films	**759**	**100.0**	**1,298.4**	**100.0**	**106**

Source: comScore, BFI RSU analysis

* Due to some overlap of categories (eg a film such as *Man with a Movie Camera* can be categorised as a re-release and a documentary) this 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 2006 to 2015 is shown in Figure 1. The proportion of specialised film releases has been between 60% and 70% over the period while the market share for these films has remained at around 8%-9% apart from three peak years in 2009, 2011 and 2012 when a small number of specialised titles crossed over to mainstream audiences. At 3.7%, the market share for specialised films in 2015 was the lowest for the entire period, which can partly be explained by the record box office takings derived from a small number of high grossing mainstream films in that year.

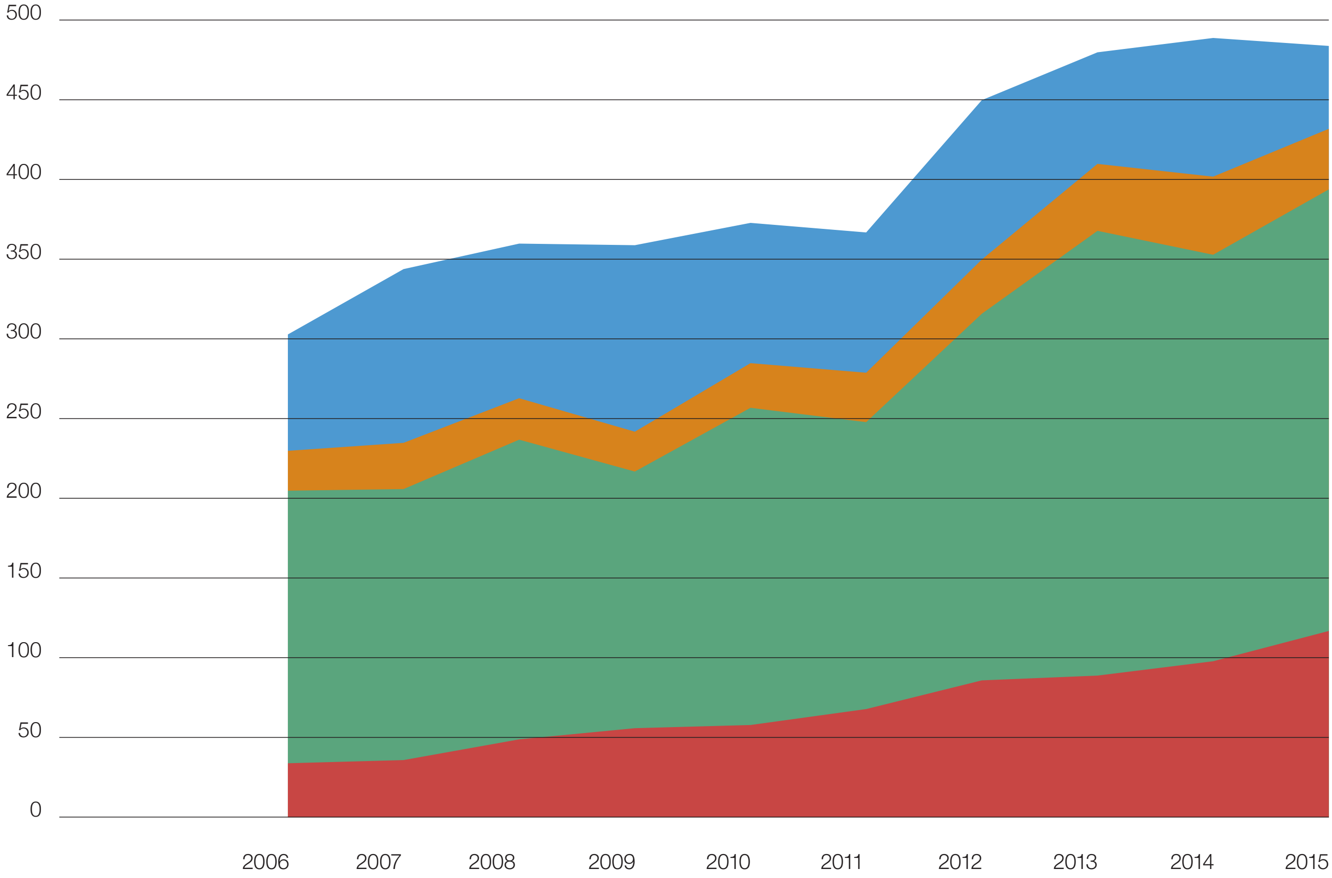
Figure 1 Specialised films, 2006-2015 (percentage of releases and market share)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Specialised films as % of total releases	58.8	64.4	66.6	68.8	63.6	61.8	66.8	63.9	64.3	60.1
Market share of specialised films	8.5	8.0	8.2	15.2	6.3	16.4	12.1	9.5	9.2	3.7

Source: comScore, BFI RSU analysis

By sorting specialised films into the four separate categories mentioned above – documentaries, foreign language films, re-releases and others (films with a distinctive genre, hook or style) – we can better understand the patterns of specialised film distribution over time. As Figure 2 shows, there has been a steady increase in the number of theatrically released feature documentaries over the period – from a low point of 34 in 2006 to 117 in 2015. The number of foreign language films has also increased, from a low of 161 releases in 2009 to a high of 279 in 2013. There were 277 foreign language releases in 2015. The number of re-released films tracked by comScore each year was usually between 25 and 30 up to 2011, but then increased slightly each year between 2011 and 2014 (when it reached a high point of 49) before falling back slightly in 2015. However, the numbers do not include all re-releases, particularly limited or one-off screenings often shown in independent cinemas. The increase in the numbers of re-releases since 2011 may partly be explained by the expansion of digital distribution. Finally, the more subjective category of films with an innovative or unconventional approach, genre or style saw numbers decline from 117 in 2009 to a low of 52 releases in 2015.

Figure 2 Number of specialised releases in the UK and Republic of Ireland, 2006-2015

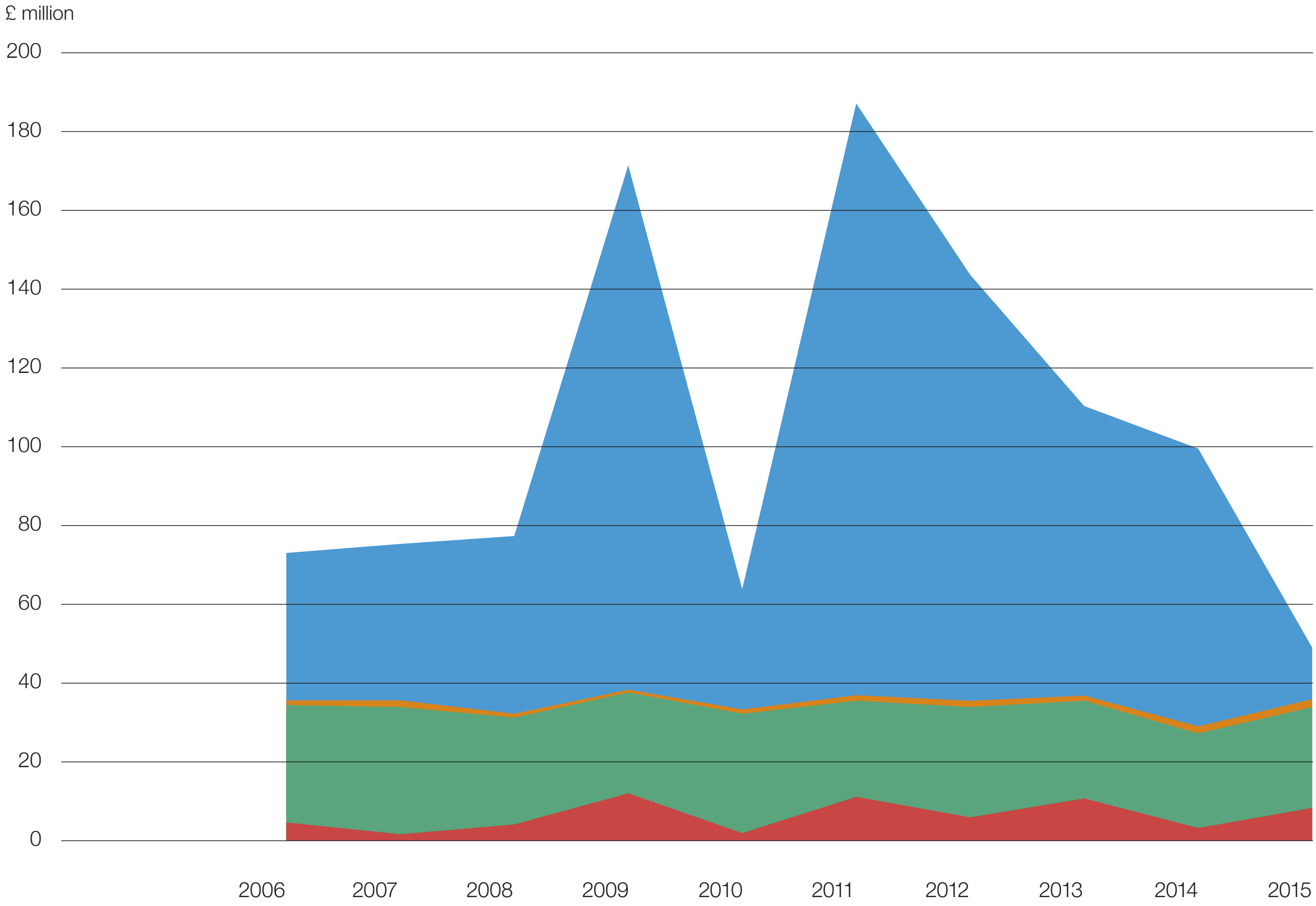


	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Documentary	34	36	49	56	58	68	86	89	98	117
Foreign language	171	170	188	161	199	180	230	279	255	277
Re-release	25	29	26	25	28	31	34	42	49	38
Other specialised	73	109	97	117	88	88	100	70	87	52

Source: comScore, BFI RSU analysis

The box office performance of specialised films, again split into the four categories of documentaries, foreign language films, re-releases and other films with a distinctive hook, genre or style, is shown in Figure 3. Box office revenues for all categories of specialised films are particularly affected by the release of a small number of high earning titles. Over the period 2006-2015, revenues for documentaries have witnessed peaks with the release of a number of break-out titles such as *Michael Jackson's This Is It* in 2009, *Senna* in 2011, *One Direction: This Is Us* in 2013 and *Amy* in 2015. Foreign language film grosses have remained reasonably consistent across the last 10 years with few high earning titles like those seen in the early 2000s such as *The Passion of the Christ* in 2004 or *Crouching Tiger, Hidden Dragon* in 2001. The combined annual revenues for re-releases of archive/classic titles are consistently small, rarely rising above £1.5 million, although 2015 was a strong year with overall box office takings of £2 million led by the re-release of *Blade Runner: The Final Cut* which alone grossed £0.8 million. Finally, the more subjective category of films with non-mainstream genres or styles has achieved its highest grosses in years when a few of its titles have translated critical acclaim into box office success such as *Slumdog Millionaire* in 2009, *The King's Speech* in 2011 and *Life of Pi* in 2012. The top release in this category in 2015 was *Macbeth*.

Figure 3 Box office gross of specialised films released in the UK and Republic of Ireland, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Documentary	4.6	1.6	4.1	12.0	1.9	11.1	5.9	10.7	3.2	8.3
Foreign language	29.8	32.3	27.1	25.6	30.3	24.4	28.0	24.8	24.0	25.6
Re-release	1.2	1.7	1.0	0.7	1.7	1.4	1.6	1.3	1.8	2.0
Other specialised	37.4	39.7	45.1	133.1	30.5	150.2	108.1	73.5	70.5	13.1

Source: comScore, BFI RSU analysis

NON-ENGLISH LANGUAGE FILMS

Films in 38 different languages (including English and Welsh) were released in the UK and Republic of Ireland in 2015, two more than in 2014 (Table 2). There were also three releases with no spoken dialogue: re-releases of Dziga Vertov's 1929 Soviet documentary *Man with a Movie Camera* and the 1928 silent classic, *Steamboat Bill, Jr.* starring Buster Keaton, and the 2015 British satire *Aaaaaaaah!* where all communication is in grunts.

After English, the most common languages, in terms of numbers of releases, were Hindi and Tamil followed by French. Hindi was again the top non-English language at the box office by value, with a 1.1% share of overall box office revenues, followed by Tamil (0.2%) and French (0.1%). There was one Welsh language film released during the year, *Dan y Wenallt*. The film was also released in English under the original title of the 1954 radio drama from which it was adapted, *Under Milk Wood*.

Table 2 Languages of films released in the UK and Republic of Ireland, 2015 (ranked by gross box office)

Main language	Number of releases	Gross box office (£ million)	Box office share (%)
English	427	1,039.8	80.0
English with others*	51	232.7	18.0
Hindi	40	14.2	1.1
Tamil	39	2.2	0.2
French	41	1.9	0.1
Spanish	11	1.0	0.1
Urdu	6	0.8	0.1
Swedish	5	0.8	0.1
Punjabi	20	0.7	0.1
Portuguese	6	0.6	<0.1
Japanese	8	0.5	<0.1
Arabic	7	0.4	<0.1
Farsi	3	0.4	<0.1
Italian	8	0.4	<0.1
Turkish	19	0.4	<0.1
Mandarin	7	0.3	<0.1
Malayalam	13	0.3	<0.1
German	8	0.3	<0.1
Cantonese	3	0.2	<0.1
Danish	3	0.1	<0.1
Telugu	6	0.1	<0.1
Indonesian	1	0.1	<0.1
Russian	4	0.1	<0.1
Hungarian	1	0.1	<0.1
Norwegian	2	<0.1	<0.1
Estonian	1	<0.1	<0.1
Welsh**	1	<0.1	<0.1
Georgian	1	<0.1	<0.1
Gujarati	1	<0.1	<0.1
Dutch	2	<0.1	<0.1
Bulgarian	1	<0.1	<0.1
Korean	1	<0.1	<0.1
Polish	1	<0.1	<0.1
Amharic	1	<0.1	<0.1
Bengali	1	<0.1	<0.1
Hebrew	2	<0.1	<0.1
Sotho	1	<0.1	<0.1
Dari	1	<0.1	<0.1
Thai	2	<0.1	<0.1
Silent/no dialogue	3	<0.1	<0.1
Total	**759**	**1,298.4**	**100.0**

Source: comScore, BBFC, IMDb, BFI RSU analysis
* 'English with others' includes films whose main language was English but with extensive use of other languages, such as *The Martian* in English and Mandarin and *Sicario* in English and Spanish.
** Welsh is a UK official language.

The 36 foreign languages were spread over 277 releases in the UK and Republic of Ireland (37% of all releases, up one percentage point on 2014) which earned £26 million at the box office (Table 3). This represented 2% of the total gross box office for 2015.

Table 3 Foreign language films at the UK and Republic of Ireland box office, 2006-2015

	Number	% of all releases	Box office (£ million)	% of total gross box office
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
2012	230	35.5	28.0	2.4
2013	279	40.0	24.8	2.2
2014	255	35.8	24.0	2.2
2015	277	36.8	25.6	2.0

Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 21 February 2016.

Films in languages from the South Asian subcontinent shared 1.4% of the box office from 16.6% of releases and films in European languages other than English earned 0.4% of the gross box office from 12.6% of releases (Table 4). Taken together, non-English language films were shown on average at 19 sites at their widest point of release (17 in 2014) compared with an average of 158 sites for English language releases.

Table 4 Language of releases in the UK and Republic of Ireland, 2015 (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*	478	63.0	1,272.5	98.0	158
South Asian subcontinent	126	16.6	18.4	1.4	26
European other than English**	95	12.5	5.3	0.4	16
West Asian/ Middle Eastern	33	4.3	1.2	0.1	5
East Asian	22	2.9	1.1	0.1	16
Other international	2	0.3	<0.1	<0.1	7
Silent/no dialogue	3	0.4	<0.1	<0.1	9
Total	**759**	**100.0**	**1,298.4**	**100.0**	**106**

Source: comScore, BBFC, IMDb, BFI RSU analysis
Notes:
* See note to Table 2.
** Includes Welsh.
Figures as at 21 February 2016.
Figures/percentages may not sum to totals due to rounding.

Table 5 shows the top 10 highest earning non-Hindi foreign language films of 2015. At number one in this list is the Argentinian black comedy *Wild Tales* (in Spanish), which took just over £0.7 million at the UK and Republic of Ireland box office. However, this film was only the fifth highest earning foreign language release in 2015 after four Hindi language titles. 2015 was the second consecutive year that the top four foreign language films were in Hindi. Furthermore, across the two years, only one non-Hindi language film grossed over £1 million, compared with eight Hindi language releases.

Three of the top earning films in the 2015 list were in other South Asian languages (Urdu, Tamil and Punjabi), while five of the films were in European languages (including three in French). Two Oscar® nominated films appear in the top 10, *The Tale of the Princess Kaguya* (in Japanese) and *Timbuktu* (in Arabic with French).

Table 5 Top 10 foreign language films (excluding Hindi*) released in the UK and Republic of Ireland, 2015

	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	Wild Tales	Arg/Spa	0.7	Curzon Artificial Eye	Spanish
2	Force Majeure	Swe/Nor/Den/Fra	0.6	Curzon Artificial Eye	Swedish
3	Bin Roye	Pakistan	0.5	B4U Network	Urdu
4	I	India	0.4	Aascar Films	Tamil
5	The Tale of the Princess Kaguya	Japan	0.3	StudioCanal	Japanese
6	Timbuktu	Mauritania/Fra	0.3	Curzon Artificial Eye	Arabic
7	The Salt of the Earth	Fra/Bra/Ita	0.3	Curzon Artificial Eye	French
8	Gemma Bovery	Fra/UK	0.3	Soda Pictures	French
9	Sardaar Ji	India	0.3	B4U Network	Punjabi
10	The New Girlfriend	France	0.2	Metrodome	French

Source: comScore BBFC, IMDb, BFI RSU analysis
Notes:
* For Hindi titles, see Table 6.
Figures as at 21 February 2016.

Table 6 shows the top 10 film releases of 2015 whose principal language is Hindi. At the top of the list is the drama *Bajrangi Bhaijaan*, with box office takings of £2.7 million. The top four films in the list were also the top four foreign language films of 2015, all of which took over £1 million at the box office. The combined box office gross of the top 10 Hindi language releases of the year was more than two and a half times greater than the combined gross of the top 10 non-Hindi foreign language releases.

Table 6 Top 10 Hindi language films released in the UK and Republic of Ireland, 2015

	Title	Country of origin	UK box office total (£ million)	Distributor
1	Bajrangi Bhaijaan	India	2.7	Eros International
2	Dilwale	India	2.4	UTV Motion Pictures
3	Prem Ratan Dhan Payo	India	1.6	20th Century Fox
4	Bajirao Mastani	India	1.4	Eros International
5	Tanu Weds Manu Returns	India	0.5	Eros International
6	Tamasha	India	0.5	UTV Motion Pictures
7	Dil Dhadakne Do	India	0.5	Eros International
8	Welcome Back	India/UAE	0.5	Eros International
9	Singh Is Bliing	India	0.4	Eros International
10	Piku	India	0.4	Yash Raj Films

Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 21 February 2016.

Table 7 shows the 10 highest grossing non-English language films released in the UK and Republic of Ireland between 2001 and 2015. The top film is the 2004 release *The Passion of the Christ* (£11.1 million), followed by *Crouching Tiger, Hidden Dragon* (£9.4 million) which was released in 2001. The most recent release in the list is *Dhoom: 3* which earned £2.7 million in 2013. (As the figures in the chart are rounded, it would appear that *Bajrangi Bhaijaan* should be included alongside *Pan's Labyrinth* and *Dhoom: 3*, however, its actual box office gross is slightly smaller.)

Crouching Tiger, Hidden Dragon is one of three Mandarin language films in the list, all of which are wuxia martial arts films, which reflects the popularity of the genre with UK audiences in the early 2000s. There are also three Spanish language films in the list (two from Spain and one from South America), and one French language title. *Dhoom: 3* is the first film in Hindi to appear in the top 10 since our records began.

Table 7 Top 10 non-English language films released in the UK and Republic of Ireland, 2001-2015

	Title	Language	UK box office total (£ million)	Distributor	Year of release
1	The Passion of the Christ	Aramaic/Latin/Hebrew	11.1	Icon	2004
2	Crouching Tiger, Hidden Dragon	Mandarin	9.4	Sony Pictures	2001
3	Amélie	French/Russian	5.0	Momentum	2001
4	Apocalypto	Mayan	4.1	Icon	2007
5	Hero	Mandarin	3.8	Walt Disney	2004
6	House of Flying Daggers	Mandarin	3.8	Pathé	2004
7	Volver	Spanish	2.9	Pathé	2006
8	The Motorcycle Diaries	Spanish	2.8	Pathé	2004
9	Pan's Labyrinth	Spanish	2.7	Optimum	2006
10	Dhoom: 3	Hindi	2.7	Yash Raj Films	2013

Source: comScore, BFI RSU analysis

DOCUMENTARIES

A total of 117 feature documentaries were released at the UK and Republic of Ireland box office in 2015, representing 15% of theatrical releases. They earned £8.3 million which was 0.6% of the overall box office gross. We have split our analysis of this category into the more traditional expository or observational style of documentary and 'concert' documentaries, which feature coverage of a particular performance and behind-the-scenes footage of popular musical performers. The most successful non-concert documentary of 2015, however, was also a film about a popular recording star: British director Asif Kapadia's film about the life of Amy Winehouse was one of the top 10 independent UK films of the year and became the all-time highest earning UK non-concert documentary at the UK box office with takings of £3.8 million.

Table 8 shows the top 20 non-concert documentaries at the UK box office since 2001. The highest grossing non-concert documentary of all time at the UK box office is Michael Moore's *Fahrenheit 9/11* which grossed £6.5 million in 2004. *Amy* joins the list in second place pushing *March of the Penguins* to third and another film by Asif Kapadia, the 2011 release *Senna*, into fourth place. Another new entry in the list is a film about the lead singer of rock band Nirvana, *Cobain: Montage of Heck*. Nine of the top 20 non-concert documentaries since 2001 are UK films.

Table 8 Top 20 non-concert feature documentaries released in the UK and Republic of Ireland, 2001-2015

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Fahrenheit 9/11	USA	2004	6.5	200	Optimum
2	Amy	UK	2015	3.8	280	Altitude
3	March of the Penguins	Fra	2005	3.3	163	Warner Bros
4	Senna	UK	2011	3.2	358	Universal
5	Touching the Void	UK	2003	2.6	50	Pathé
6	Bowling for Columbine	USA	2002	1.7	37	Momentum
7	TT3D: Closer to the Edge	UK	2011	1.3	125	CinemaNX
8	The Imposter	UK/USA	2012	1.1	77	Picturehouse/ Revolver
9	Super Size Me	USA	2004	1.1	83	Tartan
10	Marley	UK/Jam/USA	2012	1.0	333	Universal
11	An Inconvenient Truth	USA	2006	0.9	68	Paramount
12	Man on Wire	UK/USA	2008	0.9	43	Icon
13	Être et Avoir	Fra	2003	0.7	15	Tartan
14	Pina	Ger/Fra	2011	0.7	26	Artificial Eye
15	Cave of Forgotten Dreams	UK/Can/Fra/Ger/USA	2011	0.6	39	Picturehouse
16	20,000 Days on Earth	UK	2014	0.6	33	Picturehouse
17	Spellbound	USA	2003	0.5	17	Metrodome
18	The September Issue	USA	2009	0.4	18	Momentum
19	Cobain: Montage of Heck	USA	2015	0.4	85	Munro
20	Capturing the Friedmans	USA	2004	0.4	26	Tartan

Source: comScore, BFI RSU analysis
Notes:
The table does not include concert performance documentaries, IMAX-only documentaries and shorts.
Based on box office data for 2001-2015.
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.

A number of concert performance documentaries, often now in 3D, are released theatrically every year. Table 9 shows the top 10 documentaries in this category from 2008 to 2015. The highest grossing title released during the period is *Michael Jackson's This Is It*, which earned £9.8 million in 2009. The highest earning concert performance film in the UK in 2015 was *Roger Waters The Wall*, which earned £0.4 million and is just outside the top 10 concert documentaries.

Table 9 Top 10 concert documentaries released in the UK and Republic of Ireland, 2008-2015

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Michael Jackson's This Is It	USA	2009	9.8	498	Sony Pictures
2	One Direction: This Is Us	UK/USA	2013	8.0	479	Sony Pictures
3	Justin Bieber: Never Say Never	USA	2011	2.3	388	Paramount
4	Katy Perry: Part of Me	USA	2012	1.2	326	Paramount
5	Hannah Montana/Miley Cyrus: Best of Both Worlds Concert	USA	2008	0.8	65	Walt Disney
6	U2 3D	USA	2008	0.7	67	Revolver
7	Glee: The 3D Concert Movie	USA	2011	0.7	335	20th Century Fox
8	Shine a Light	USA/UK	2008	0.7	159	20th Century Fox
9	JLS: Eyes Wide Open 3D	UK	2011	0.5	210	Omniverse
10	The Stone Roses: Made of Stone	UK	2013	0.5	83	Picturehouse

Source: comScore, BFI RSU analysis

RE-RELEASES

In 2015, 38 archive/classic titles were re-released in the UK and Republic of Ireland. According to comScore these re-releases accounted for 3.6% of the year's theatrical releases and generated a combined gross of £2 million (0.2% of the total box office). However, not all box office revenues for re-releases are tracked by comScore, 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 10 shows the top 20 specialised re-releases at UK and Republic of Ireland cinemas over the last 15 years. The list is topped by *A Clockwork Orange*, which grossed £2.1 million in 2000 and is the first of four entries for director Stanley Kubrick. His sci-fi epic *2001: A Space Odyssey* appears twice, at number nine from its 2014 re-release (as part of the BFI's Sci-fi season) and at number 12 from its 2001 re-release. His other entry is the 2012 re-release of *The Shining*. Alongside *A Clockwork Orange*, two other re-releases have grossed over £1 million – Steven Spielberg's 20th anniversary re-release of *E.T.* (2002) and the 25th anniversary re-release of sci-fi comedy *Back to the Future* (2010). There is one new entry in the list: the 2015 re-release of *Blade Runner: The Final Cut* is at number four with box office takings of £0.8 million.

Table 10 Top 20 re-releases at the UK and Republic of Ireland box office, 2000-2015

	Title (year of original release)	Country of origin	Year of re-release	Box office gross (£m)	Widest point of release (sites)	Distributor
1	A Clockwork Orange (1972)	UK	2000	2.1	328	Warner Bros
2	E.T. (20th anniversary) (1982)	USA	2002	2.1	313	UIP
3	Back to the Future (25th anniversary) (1985)	USA	2010	1.2	273	Universal
4	Blade Runner: The Final Cut (2007)	UK/USA/ Hong Kong	2015	0.8	136	BFI
5	Alien (Director's Cut) (1979)	UK/USA	2003	0.5	134	20th Century Fox
6	Jurassic Park (1993)	USA	2011	0.5	277	Universal
7	Apocalypse Now (Redux) (1979)	USA	2001	0.5	22	Walt Disney
8	Jaws (1975)	USA	2012	0.4	319	Universal
9	2001: A Space Odyssey (1968)	UK/USA	2014	0.4	60	BFI
10	The Leopard (1963)	Ita/Fra	2003	0.3	5	BFI
11	It's a Wonderful Life (1946)	USA	2007	0.3	33	Park Circus
12	2001: A Space Odyssey (1968)	UK/USA	2001	0.3	4	Warner Bros
13	Breakfast at Tiffany's (1961)	USA	2001	0.3	5	BFI
14	The Shining (1980)	UK/USA	2012	0.2	29	BFI
15	Dirty Dancing (20th anniversary) (1987)	USA	2007	0.2	19	Lionsgate
16	Breakfast at Tiffany's (50th anniversary) (1961)	USA	2011	0.2	13	BFI
17	Casablanca (1943)	USA	2012	0.2	17	Park Circus
18	Chariots of Fire (1981)	UK	2012	0.2	149	20th Century Fox
19	À bout de souffle (1960)	Fra	2000	0.2	5	Optimum
20	Home Alone (1990)	USA	2012	0.2	325	20th Century Fox

Source: comScore, BFI RSU analysis

CHAPTER 6

UK FILMS AT THE WORLDWIDE BOX OFFICE

Image: *Avengers: Age of Ultron* © 2015 Marvel

UK FILMS AT THE WORLDWIDE BOX OFFICE

UK qualifying films released at the worldwide box office in 2015 earned one quarter of total global receipts. *Star Wars: The Force Awakens* was the top grossing UK film of the year with worldwide earnings of $1.9 billion, while *Paddington* was the highest grossing independent UK title with takings of $112 million.

FACTS IN FOCUS

- UK qualifying films earned $9.4 billion worldwide in 2015, accounting for 25% of global box office receipts.
- Independent UK films accounted for 2.8% of the global theatrical market, at a value of $1.1 billion.
- The best performing UK film globally was *Star Wars: The Force Awakens* ($1.9 billion) which is now the all-time highest earning UK qualifying film at the worldwide box office.
- *Paddington* was the highest earning UK independent film at the global box office in 2015, with takings of $112 million. (The film was the third highest earning UK independent title of 2014 with takings of $137 million.)
- UK films accounted for 20 of the top 100 titles at the worldwide box office in 2015 with a total box office of $8.6 billion.
- Independent UK films took 3.2% of the North American box office and 3.6% of the box office in Europe. Outside the UK and Republic of Ireland, New Zealand had the highest share for independent UK titles at 9.2%.

UK FILMS WORLDWIDE

UK films earned a combined worldwide gross of $9.4 billion in 2015, a 25.1% share of the global box office, which hit a new record of $37.6 billion (Table 1). The 2015 global gross for UK films was the highest since our records began.

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) shared 22.3% of the worldwide box office in 2015, with earnings of $8.4 billion, more than double the $3.6 billion seen in 2014. UK independent films earned 2.8% of global revenues with a gross box office of $1.1 billion, slightly down from $1.2 billion in 2014. These global market shares include the box office takings in the UK and Republic of Ireland release territory (where UK studio-backed films had a 34.2% share of the box office and UK independent films had 10.5%).

Table 1 UK films global market share, 2002-2015

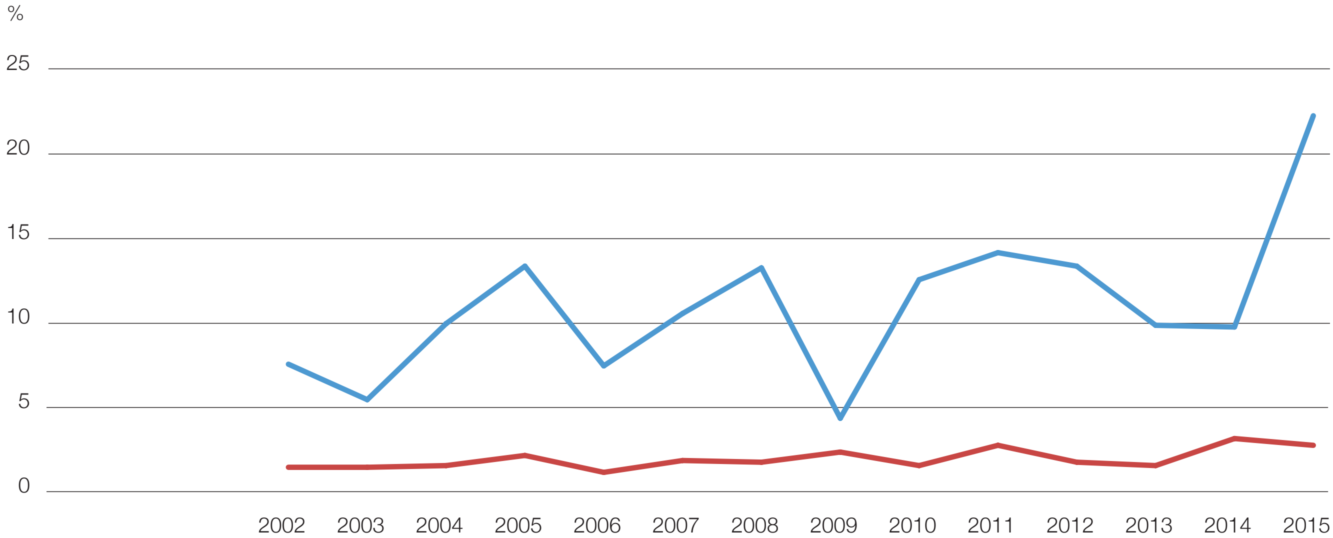
Year	UK films worldwide gross (US$ billion)	Global theatrical market (US$ billion)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
2002	1.8	19.8	9.1	7.6	1.5
2003	1.4	20.1	6.9	5.5	1.5
2004	2.9	24.9	11.6	10.0	1.6
2005	3.6	23.1	15.5	13.4	2.2
2006	2.2	25.5	8.6	7.5	1.2
2007	3.3	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
2012	5.3	34.7	15.3	13.4	1.8
2013	4.1	35.7	11.4	9.8	1.6
2014	4.9	35.9	13.5	10.2	3.3
2015	9.4	37.6	25.1	22.3	2.8

Source: BFI, comScore, IHS

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

As Figure 1 shows, the UK/US studio market share fluctuates significantly from year to year and is highly dependent on the performance of a small number of titles. The unprecedented peak achieved in 2015 was propelled by the enormous success of *Star Wars: The Force Awakens* ($1.9 billion), the all-time highest earning UK qualifying film at the global box office, as well as the strong performances of *Avengers: Age of Ultron* ($1.4 billion) and *SPECTRE* ($809 million). There has been a rising trend for UK independent films' market share over the period with a peak in 2014. Again this was largely due to the success of a small number of titles – *The Imitation Game* ($228 million), *Non-Stop* ($223 million) and *Paddington* ($137 million). The share for independent films in 2015, while down slightly on the previous year, was still the joint second highest of the period. *The Imitation Game* and *Paddington* (both of which had releases split across 2014 and 2015) were again among the top earning titles with 2015 grosses of $102 million and $112 million respectively, while other significant earners included *Shaun the Sheep the Movie* ($103 million) and *The Second Best Exotic Marigold Hotel* ($88 million).

Figure 1 UK films global market share, 2002-2015



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
UK studio-backed films share* (%)	7.6	5.5	10.0	13.4	7.5	10.6	13.3	4.4	12.6	14.2	13.4	9.9	9.8	22.3
UK independent films share (%)	1.5	1.5	1.6	2.2	1.2	1.9	1.8	2.4	1.6	2.8	1.8	1.6	3.2	2.8

Source: BFI RSU

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

As Table 2 shows, the list of the top 10 highest grossing UK qualifying film at the worldwide box office in 2015 is headed by *Star Wars: The Force Awakens* ($1.9 billion) and *Avengers: Age of Ultron* ($1.4 billion). No independent UK films made the list of top 10 earning UK films released in 2015, compared with two (*The Imitation Game* and *Non-Stop*) in 2014. The top earning independent UK film worldwide in 2015, *Paddington*, fell just outside the top 10 in 13th place.

Table 2 Top 10 UK qualifying films worldwide, 2015

	Title	Country of origin	Worldwide gross (US$ million)
1	Star Wars: The Force Awakens	UK/USA	1,946
2	Avengers: Age of Ultron	UK/USA	1,375
3	SPECTRE	UK/USA	809
4	Mission: Impossible – Rogue Nation	UK/USA	653
5	The Martian	UK/USA	587
6	Cinderella	UK/USA	559
7	Ant-Man	UK/USA	512
8	Terminator Genisys	UK/USA	440
9	Kingsman: The Secret Service	UK/USA	398
10	Everest	UK/USA/Ice	191
Total			**7,469**

Source: BFI RSU
Notes:
Worldwide gross includes the UK and Republic of Ireland.
Gross box office revenue as of 21 February 2016.
Figures may not sum to total due to rounding.

The highest grossing UK independent film in 2015 was *Paddington*, which earned $112 million worldwide, followed by *Shaun the Sheep the Movie* which grossed $103 million (Table 3). *The Imitation Game* ($102 million) was the only other independent UK title to earn over $100 million at the global box office from its 2015 release.

Table 3 Top 10 UK independent films worldwide, 2015

	Title	Country of origin	Worldwide gross (US$ million)
1	Paddington*	UK/Fra	112
2	Shaun the Sheep the Movie	UK/Fra	103
3	The Imitation Game*	UK/USA#	102
4	The Second Best Exotic Marigold Hotel	UK/USA#	88
5	Woman in Gold	UK/USA#	62
6	The Woman in Black: Angel of Death	UK/Can/USA#	55
7	Brooklyn	UK/Can/Ire	45
8	Legend	UK/Fra/USA#	39
9	Ex Machina	UK/USA#	37
10	Mortdecai	UK/USA#	36
Total			**679**

Source: BFI RSU
Notes:
Worldwide gross includes the UK and Republic of Ireland.
The box office gross is cumulative gross box office up to 21 February 2016 in territories where the film was released in 2015. Box office takings from territories where the film was released in 2014 or 2016 are not included in the total.
* *Paddington* and *The Imitation Game* appear in the lists of top 10 independent UK films for both 2014 and 2015, as their releases were split across those two years. (In 2014 *Paddington* earned £137 million and *The Imitation Game* earned $228 million.)
# Films made with independent (non-studio) US support.

UK FILMS IN NORTH AMERICA

Table 4 shows the countries of origin of films released in the USA and Canada in 2015. UK films represented 10% of releases in the North American market up from 8% in 2014. The total revenue from these films stood at $3,178 million, more than double the $1,292 million earned in 2014. UK independent films grossed $354 million, again more than double the $150 million earned in 2014.

Table 4 Country of origin of films released in the USA and Canada, 2015

Country of origin	Number of releases	% of releases	Box office gross (US$ million)	Box office share (%)
UK independent films	51	7.3	354	3.2
UK studio-backed films*	19	2.7	2,824	25.6
UK films total	70	10.0	3,178	28.8
USA	337	48.0	7,585	68.7
Rest of the world	295	42.0	273	2.5
Total	**702**	**100.0**	**11,036**	**100.0**

Source: comScore BBFC, BFI RSU analysis
* 'Studio-backed' means backed by one of the major US film studios.

As with the share of the global market, the market share for UK films in North America has fluctuated greatly over the last 14 years depending on the performance of a very small number of titles (Table 5). The overall UK share in 2015 was 28.8%, nearly double that of 2014 (15.6%) and the highest share since our records began. The market share for UK independent films was also the highest since our records began at 3.2% (a small increase from the previous high of 3.1% in 2014).

Table 5 UK market share in North America, 2002-2015

Year	Total UK share %	UK/US studio-backed films share* %	UK independent films share %
2002	7.2	6.6	0.6
2003	5.7	4.2	1.5
2004	11.0	9.7	1.3
2005	15.8	15.0	0.8
2006	9.2	7.6	1.6
2007	11.8	10.6	1.2
2008	16.3	14.5	1.8
2009	6.6	5.5	1.1
2010	14.2	12.4	1.8
2011	16.5	15.3	1.2
2012	16.2	14.6	1.5
2013	11.9	10.5	1.4
2014	15.6	12.4	3.1
2015	28.8	25.6	3.2

Source: comScore, BFI RSU analysis
* 'Studio-backed' means backed by one of the major US film studios.

Star Wars: The Force Awakens was the top performing UK qualifying film in North America in 2015 earning $922 million, followed by *Avengers: Age of Ultron* with $459 million (Table 6). There were six independent UK films in the top 20, two less than in 2014. The top performing UK independent titles were *Paddington* with $76 million and *Brooklyn* with $36 million.

Table 6 Top 20 UK films at the USA and Canada box office (including co-productions), 2015

	Title	Country of origin	Box office gross (US$ million)	US distributor
1	Star Wars: The Force Awakens	UK/USA	922.4	Walt Disney
2	Avengers: Age of Ultron	UK/USA	459.0	Walt Disney
3	The Martian	USA	228.3	20th Century Fox
4	Cinderella	UK/USA	201.2	Walt Disney
5	SPECTRE	UK/USA	199.8	MGM/Columbia/ Sony
6	Mission: Impossible – Rogue Nation	UK/USA	195.0	Paramount
7	Ant-Man	UK/USA	180.2	Walt Disney
8	Kingsman: The Secret Service	UK/USA	128.3	20th Century Fox
9	Terminator Genisys	UK/USA	89.8	Paramount
10	Paddington	UK/Fra	76.2	The Weinstein Company
11	Jupiter Ascending	UK/USA	47.4	Warner Bros
12	The Man from U.N.C.L.E.	UK/USA	45.4	Warner Bros
13	Everest	UK/USA/Ice	43.5	Universal
14	Brooklyn	UK/Ire/Can	35.6	Fox Searchlight
15	Pan	UK/USA/Aus	35.1	Warner Bros
16	Woman in Gold	UK/USA#	33.3	The Weinstein Company
17	The Second Best Exotic Marigold Hotel	UK/USA#	33.1	Fox Searchlight
18	The Woman in Black: Angel of Death	UK/Can/USA#	26.5	Relativity Media
19	Ex Machina	UK/USA#	25.4	A24 Films
20	In the Heart of the Sea	UK/USA	25.0	Warner Bros

Source: comScore, BFI RSU analysis
Notes:
Table lists the gross box office for films released in the USA and Canada in 2015 and includes 2015 earnings up to 21 February 2016.
Films made with independent (non-studio) US support.

UK FILMS IN EUROPE

Outside the UK and Republic of Ireland, the market shares for UK films in major European territories, including Russia, ranged from a high of just under 32% in Russia (including 2.4% for UK independent films) to 21% in France (Table 7). The largest shares for UK independent films were recorded in Portugal (6.6%) and the Netherlands (5.5%) where *Paddington* and *The Imitation Game* were the top independent titles respectively.

Table 7 UK market share in selected European territories, 2015

Territory	Box office for UK films ($ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top independent UK film
Austria	46.2	26.4	22.9	3.5	Shaun the Sheep the Movie
France†	350.2	21.4	18.3	3.1	The Imitation Game
Germany	403.4	28.4	25.0	3.4	Shaun the Sheep the Movie
Italy	206.8	25.3	20.0	5.4	The Imitation Game
Netherlands	95.0	29.6	24.1	5.5	The Imitation Game
Portugal	30.8	29.2	22.6	6.6	Paddington
Russia	431.1	31.9	29.5	2.4	Paddington
Spain	187.4	24.7	20.5	4.3	The Imitation Game

Source: comScore, BBFC, BFI RSU analysis

Notes:

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

† In previous editions of the Yearbook we have reported admissions. In 2015, France had a total of 41.3 million admissions for UK films.

The most popular UK film in EU countries (other than the UK, Republic of Ireland and Malta) in 2015 was *Star Wars: The Force Awakens* with over 27.7 million admissions (Table 8). *The Imitation Game* recorded the most admissions for an independent UK film in the EU with over 5.1 million ticket sales. Five of the top 20 titles were UK independent films, six less than in 2014.

Table 8 Top 20 UK films in other EU countries, 2015

	Title	Country of origin	EU admissions
1	Star Wars: The Force Awakens	UK/USA	27,712,023
2	SPECTRE	UK/USA	24,856,886
3	Avengers: Age of Ultron	UK/USA	15,616,445
4	The Martian	USA	10,417,142
5	Mission: Impossible – Rogue Nation	UK/USA	8,863,135
6	Cinderella	UK/USA	8,663,883
7	Everest	UK/USA/Ice	5,464,017
8	The Imitation Game	UK/USA	5,127,014
9	Kingsman: The Secret Service	UK/USA	5,057,139
10	Ant-Man	UK/USA	4,876,634
11	Shaun the Sheep the Movie	UK/Fra	4,662,048
12	Terminator Genisys	UK/USA	4,604,843
13	The Theory of Everything	UK/USA	3,506,706
14	Paddington	UK/Fra	3,325,429
15	Exodus: Gods and Kings	UK/USA	3,235,012
16	Pan	UK/USA/Aus	2,501,516
17	Jupiter Ascending	UK/USA	2,448,237
18	Youth	UK/Ita/Fra/Swi	2,002,348
19	Fury	UK/USA	1,794,305
20	The Man from U.N.C.L.E.	UK/USA	1,456,535

Source: European Audiovisual Observatory Lumière Database
Note: Data based on admissions from EU countries (excluding the UK, Republic of Ireland and Malta) in the 2015 calendar year.

Outside the EU, *SPECTRE* was the UK film with the highest admissions in Norway and Switzerland (it was also the film with the highest admissions overall in the latter territory). *Avengers: Age of Ultron* had the highest admissions in Russia and Turkey, although in both these markets UK films featured less highly in the end of year rankings than in EU territories. In Iceland *Everest* was both the best attended UK film and highest earning film overall in 2015 helped by strong local interest thanks to its Icelandic director Baltasar Kormákur.

UK FILMS IN LATIN AMERICA

UK films earned between 18% and 28% of the box office in the Latin American territories for which data are available (Table 9). *Avengers: Age of Ultron* was the highest performing UK film in those territories with combined takings of $224 million and *Star Wars: The Force Awakens* was second with $178 million. The market share for UK independent films ranged from 0.9% in Chile to 1.9% in Mexico with an average across the territories analysed of 1.3% (down from 1.6% in 2014). *The Imitation Game* was the top performing independent UK title in all of the territories except Colombia and Mexico where *The Woman in Black: Angel of Death* was the highest earner.

Table 9 UK market share in selected Latin American countries, 2015

Territory	Box office for UK films ($ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
Argentina	107.1	18.3	17.0	1.2	The Imitation Game
Brazil	295.0	27.6	26.1	1.4	The Imitation Game
Chile	39.2	23.2	22.3	0.9	The Imitation Game
Colombia	109.2	21.9	20.9	1.0	The Woman in Black: Angel of Death
Mexico	269.6	26.4	24.5	1.9	The Woman in Black: Angel of Death
Venezuela	219.2	23.2	22.2	1.0	The Imitation Game

Source: comScore, BFI RSU analysis
* 'Studio-backed' means backed by one of the major US film studios.

UK FILMS IN ASIA

As in Latin America, *Avengers: Age of Ultron* was the top earning UK qualifying film across all the selected Asian markets with the exception of Japan where *Star Wars: The Force Awakens* was the top performing UK title. The shares for both studio-backed and independent UK films were lower in China than other Asian territories but it is worth noting that the Chinese market has a quota for film imports which limits the number of foreign films released in the territory. Four different UK independent films were the highest earners across the six territories – *Paddington*, *The Imitation Game*, *Mortdecai* and *The Woman in Black: Angel of Death*.

Table 10 UK market share in selected Asian markets, 2015

Territory	Box office for UK films ($ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
China	1,059.6	15.1	14.4	0.6	Paddington
Hong Kong	79.6	28.8	26.8	2.0	The Imitation Game
Japan	466.1	20.7	19.5	1.2	Mortdecai
Malaysia	80.4	26.5	25.6	0.8	The Woman in Black: Angel of Death
Singapore	58.7	32.5	30.4	2.1	The Imitation Game
South Korea	366.3	22.2	20.6	1.5	The Imitation Game

Source: comScore, BFI RSU analysis
* 'Studio-backed' means backed by one of the major US film studios.

UK FILMS IN AUSTRALASIA

Star Wars: The Force Awakens was the highest grossing UK film in both Australia and New Zealand in 2015, with *Avengers: Age of Ultron* second and *SPECTRE* third in both territories. *The Imitation Game* was the top grossing UK independent film in Australia and *The Second Best Exotic Marigold Hotel* was the leading UK independent title in New Zealand (Table 11). At over 38%, the market share for UK films in New Zealand was the largest for any territory outside the UK and Republic of Ireland.

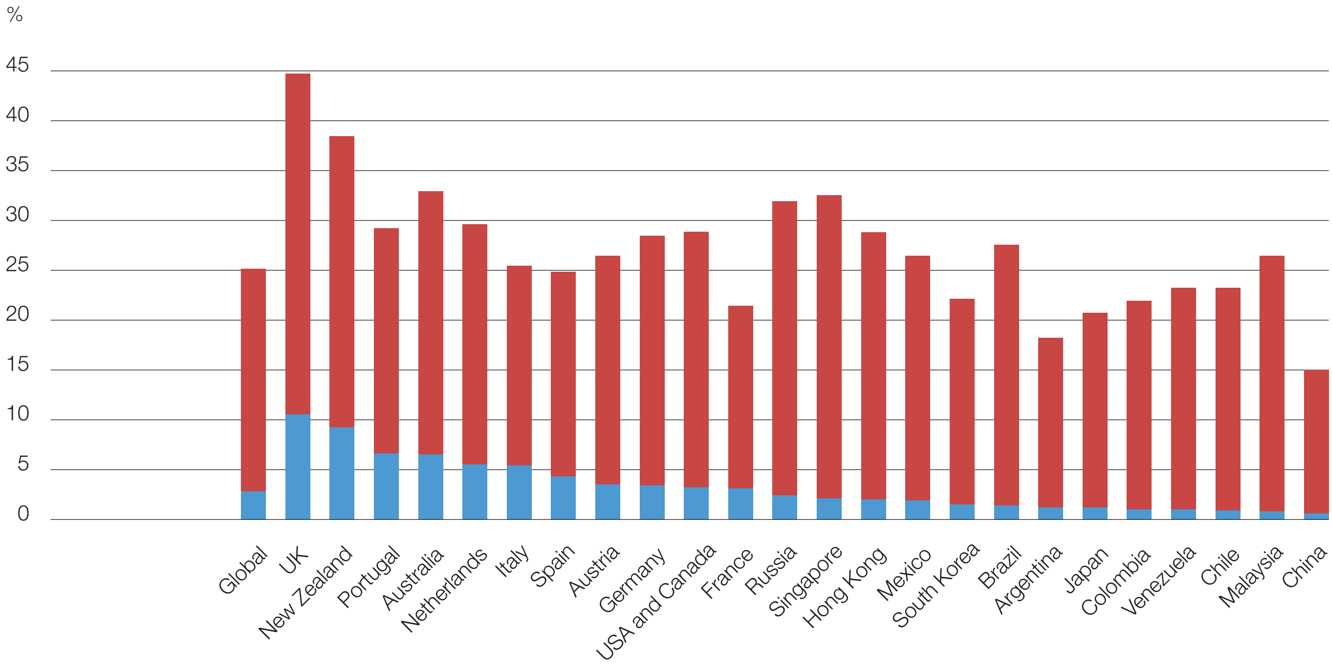
Table 11 UK market share in Australia and New Zealand, 2015

Territory	Box office for UK films ($ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
Australia	391.7	32.9	26.4	6.5	The Imitation Game
New Zealand	59.4	38.4	29.2	9.2	The Second Best Exotic Marigold Hotel

Source: comScore, BFI RSU analysis
* 'Studio-backed' means backed by one of the major US film studios.

Figure 2 shows the market share of UK films for the territories shown in Tables 4, 6-7 and 9-11. The share for the UK and Republic of Ireland and the overall global share are included to provide a comparison. The territories are listed in order of market share of UK independent films. New Zealand and Portugal had the second and third highest UK independent market share respectively, at 9.2% and 6.6%.

Figure 2 UK market share in 24 territories, 2015 (in order of market share of UK independent films)



	Global	UK	New Zealand	Portugal	Australia	Netherlands	Italy	Spain	Austria	Germany	USA and Canada	France	Russia	Singapore	Hong Kong	Mexico	South Korea	Brazil	Argentina	Japan	Colombia	Venezuela	Chile	Malaysia	China
UK independent	**2.8**	10.5	9.2	6.6	6.5	5.5	5.4	4.3	3.5	3.4	3.2	3.1	2.4	2.1	2.0	1.9	1.5	1.4	1.2	1.2	1.0	1.0	0.9	0.8	0.6
UK studio-backed*	**22.3**	34.2	29.2	22.6	26.4	24.1	20.0	20.5	22.9	25.0	25.6	18.3	29.5	30.4	26.8	24.5	20.6	26.1	17.0	19.5	20.9	22.2	22.3	25.6	14.4
Total UK market share	**25.1**	**44.7**	**38.4**	**29.2**	**32.9**	**29.6**	**25.3**	**24.7**	**26.4**	**28.4**	**28.8**	**21.4**	**31.9**	**32.5**	**28.8**	**26.4**	**22.2**	**27.6**	**18.3**	**20.7**	**21.9**	**23.2**	**23.2**	**26.5**	**15.1**

Source: comScore, BFI RSU analysis
Notes:
Figures may not sum to total due to rounding.
* 'Studio-backed' means backed by one of the major US film studios.

CHAPTER 7

UK TALENT AND AWARDS

Image: *Amy* courtesy of Altitude Film Distribution

UK TALENT AND AWARDS

UK actors, directors and writers consistently win acclaim at the global box office and international awards ceremonies. In 2015, UK talent and story material continued to reach enthusiastic audiences and showcase our culture and identity to the world.

FACTS IN FOCUS

- Of the top 200 global box office successes of 2001-2015, 36 films are based on stories and characters created by UK writers. Together they have earned $30 billion (£20 billion) at the worldwide box office.
- Five of the top 20 global box office successes of the last 15 years are based on novels by UK writers.
- British acting talent has played lead or supporting roles in 81% of live action titles in the top 200 films of the last 15 years.
- UK directors were behind 31 of the 200 highest earning films of the last 15 years with Harry Potter director, David Yates, topping the box office league.
- UK films and talent won 26 major film awards in 2015/16, including six Oscars® and 11 BAFTAs.

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 2015, 48 are UK qualifying films, and UK-originated story material provided the inspiration for 36 films, a feat bettered only by US story material. Collectively these 36 films have earned $30 billion (£19.6 billion at the 2015 average exchange rate) at the global box office.

Novels by British writers have provided the source material for five of the top 20 grossing films worldwide since 2001 (Table 1). Also appearing in the top 20 is *The Dark Knight Rises* which features the character Batman created by American Bob Kane, but the story for this film was written by British writer/director Christopher Nolan.

Table 1 Top 20 grossing films worldwide, 2001-2015

Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK story material (writer)
1	Avatar	USA	2,788	20th Century Fox	
2	Star Wars: The Force Awakens	UK/USA	2,066	Walt Disney	
3	Jurassic World	USA	1,670	Universal	
4	Marvel Avengers Assemble	USA	1,520	Walt Disney	
5	Fast & Furious 7	USA	1,516	Universal	
6	Avengers: Age of Ultron	UK/USA	1,405	Walt Disney	
7	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,342	Warner Bros	Novel by JK Rowling
8	Frozen	USA	1,277	Walt Disney	
9	Iron Man 3	USA/China	1,215	Walt Disney	
10	Minions	USA/Fra	1,159	Universal	
11	Transformers: Dark of the Moon	USA	1,124	Paramount	
12	The Lord of the Rings: The Return of the King	USA/NZ	1,120	New Line	Novel by JRR Tolkien
13	Skyfall	UK/USA	1,109	MGM/Colombia/Sony	Based on novels by Ian Fleming
14	Transformers: Age of Extinction	USA/China	1,104	Paramount	
15	The Dark Knight Rises	UK/USA	1,085	Warner Bros	
16	Pirates of the Caribbean: Dead Man's Chest	USA	1,066	Buena Vista	
17	Toy Story 3	USA	1,063	Walt Disney	
18	Pirates of the Caribbean: On Stranger Tides	UK/USA	1,046	Walt Disney	
19	Alice in Wonderland	USA	1,026	Walt Disney	Novel by Lewis Carroll
20	The Hobbit: An Unexpected Journey	USA/NZ	1,021	Warner Bros	Novel by JRR Tolkien

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 during the period are listed in Table 2. Eighteen are adaptations of novels by UK authors and two are from original screenplays.

Table 2 Top 20 grossing films worldwide based on stories and characters created by UK writers, 2001-2015

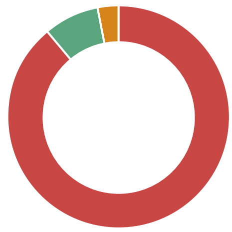
Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK story material (writer)
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,342	Warner Bros	Novel by JK Rowling
2	The Lord of the Rings: The Return of the King	USA/NZ	1,120	New Line	Novel by JRR Tolkien
3	Skyfall	UK/USA	1,109	MGM/ Columbia/Sony	Based on novels by Ian Fleming
4	Alice in Wonderland	USA	1,026	Walt Disney	Novel by Lewis Carroll
5	The Hobbit: An Unexpected Journey	USA/NZ	1,021	Warner Bros	Novel by JRR Tolkien
6	Harry Potter and the Philosopher's Stone	UK/USA	975	Warner Bros	Novel by JK Rowling
7	Harry Potter and the Deathly Hallows: Part 1	UK/USA	960	Warner Bros	Novel by JK Rowling
8	The Hobbit: The Desolation of Smaug	USA/NZ	959	Warner Bros	Novel by JRR Tolkien
9	The Hobbit: The Battle of the Five Armies	USA/NZ	956	Warner Bros	Novel by JRR Tolkien
10	Harry Potter and the Order of the Phoenix	UK/USA	940	Warner Bros	Novel by JK Rowling
11	Harry Potter and the Half-Blood Prince	UK/USA	934	Warner Bros	Novel by JK Rowling
12	The Lord of the Rings: The Two Towers	USA/NZ	926	New Line	Novel by JRR Tolkien
13	Harry Potter and the Goblet of Fire	UK/USA	897	Warner Bros	Novel by JK Rowling
14	SPECTRE	UK/USA	881	MGM/ Columbia/Sony	Based on novels by Ian Fleming
15	Harry Potter and the Chamber of Secrets	UK/USA	879	Warner Bros	Novel by JK Rowling
16	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	872	New Line	Novel by JRR Tolkien
17	Inception	UK/USA	826	Warner Bros	Original screenplay by Christopher Nolan
18	Harry Potter and the Prisoner of Azkaban	UK/USA	797	Warner Bros	Novel by JK Rowling
19	The Chronicles of Narnia: The Lion, the Witch and the Wardrobe	USA/NZ	745	Walt Disney	Novel by CS Lewis
20	Interstellar	USA	675	Paramount	Original screenplay by Jonathan and Christopher Nolan

Source: BFI RSU

Of the 36 films from the top 200 based on UK stories and characters, the majority (89%) were based on the work of current and classic authors such as Ian Fleming, CS Lewis, JK Rowling and JRR Tolkien (Figure 1). Three new films based on stories and characters created by UK writers appear in the list – *SPECTRE*, *Fifty Shades of Grey* and *Kingsman: The Secret Service*.

Figure 1 Origin of UK story material in the top 200 films at the worldwide box office, 2001-2015

	%
Novel	89
Original screenplay	8
Musical	3



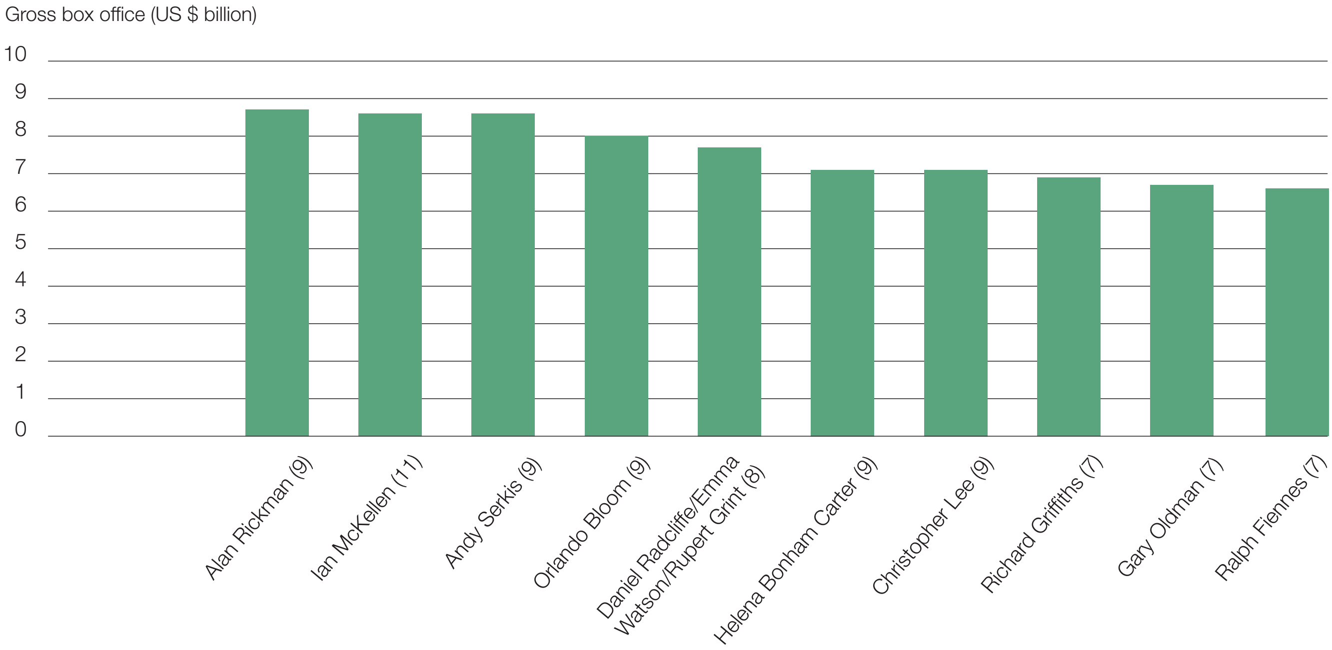
Source: BFI RSU

UK ACTORS

Nearly two thirds (126) of the top 200 films at the global box office since 2001 have featured British actors in either lead/title roles (56) or in the supporting cast (70). If animated titles are removed (44 titles), then British acting talent has played lead or supporting roles in 81% of the top live action films of the last 15 years. The global prominence of UK acting talent is reflected in Figure 2, which shows the top 12 British actors based on appearances in the top 200 films and ranked by total box office gross. The Harry Potter films feature heavily in this chart.

At the top of the list is the late Alan Rickman thanks to appearances in nine of the top 200 films including the Harry Potter series and *Alice in Wonderland*. In second place is Ian McKellen who has appeared in 11 of the top 200 films, including all three Lord of the Rings films, The Hobbit trilogy and the three X-Men films that feature in the top 200. Third in the list is Andy Serkis, whose ground-breaking motion capture performances have contributed to the Lord of the Rings, Planet of the Apes and the Hobbit films as well as *King Kong* and 2015's *Star Wars: The Force Awakens*. Orlando Bloom is next thanks to appearances in five Tolkien adaptations plus three Pirates of the Caribbean films and is followed by the three regular young stars of the Harry Potter franchise – Daniel Radcliffe, Emma Watson and Rupert Grint. The only other female actor to feature in the list is Helena Bonham Carter who has appeared in nine of the top 200 films, including four Harry Potter films, *The King's Speech* and *Les Misérables*.

Figure 2 Top 12 UK actors featured in the top 200 films at the worldwide box office, 2001-2015 (number of appearances in brackets)



Worldwide gross from films in top 200 (US$ billion)	8.7	8.6	8.6	8.0	7.7	7.1	7.1	6.9	6.7	6.6

Source: BFI RSU
Notes: 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).

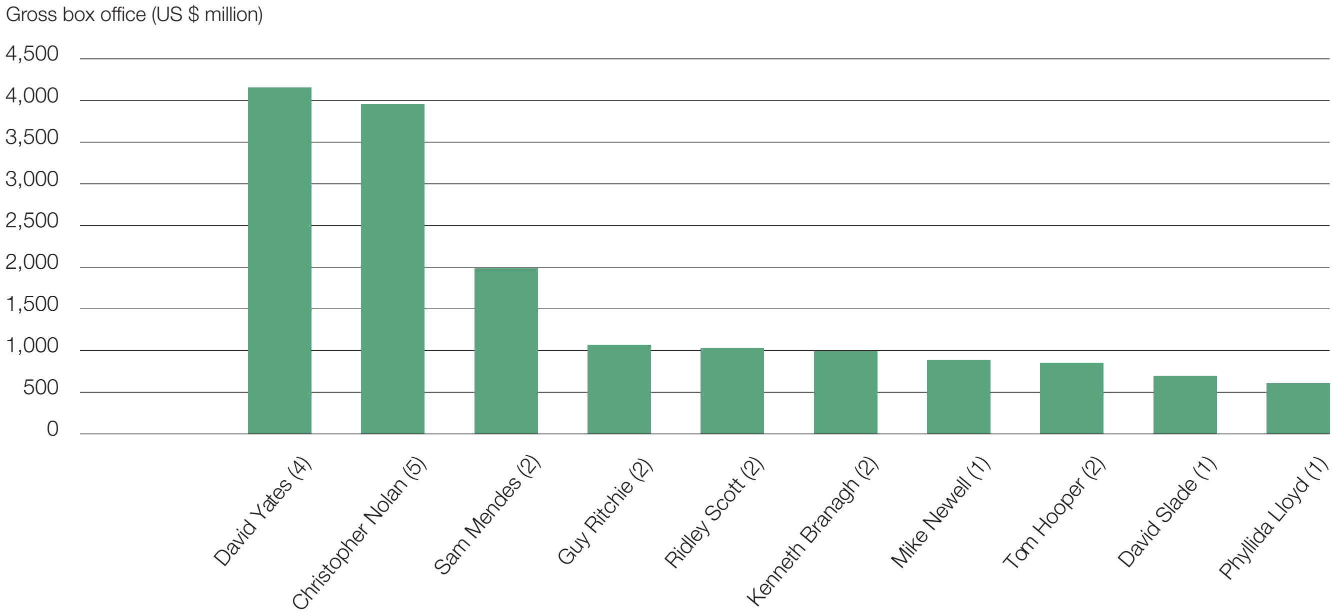
UK DIRECTORS

Thirty-one of the 200 highest grossing films at the global box office between 2001 and 2015 were helmed by British directors (Figure 3 and Table 3). David Yates remains the most commercially successful British director in recent years, with total top 200 box office takings of $4.16 billion from his 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). Christopher Nolan is second with $3.96 billion, with three Batman films, *Inception* and *Interstellar* in the list. In third place is *Skyfall* and *SPECTRE* director Sam Mendes ($1.99 billion) followed by Guy Ritchie whose two Sherlock Holmes titles earned $1.07 billion.

Two women feature in the list of top British directors at the global box office: Phyllida Lloyd is 10th in the list with a worldwide gross of $610 million for *Mamma Mia!* and Sam Taylor-Johnson is 11th with a gross of $571 million for *Fifty Shades of Grey*.

There are two UK independent films in the top 200. These are Tom Hooper's *The King's Speech* (with a worldwide gross of $414 million) and Danny Boyle's *Slumdog Millionaire* ($377 million).

Figure 3 Top 10 UK directors based on top 200 grossing films at the worldwide box office, 2001-2015 (number of films in brackets)



Worldwide gross from films in top 200 (US$ million)	4,156	3,960	1,989	1,068	1,034	993	893	856	699	610

Source: BFI RSU

Table 3 UK directors from the top 200 films at the worldwide box office and their films, 2001-2015

Director	Film(s)	Total gross box office (US$ million)
David Yates	Harry Potter and the Deathly Hallows: Part 2 Harry Potter and the Deathly Hallows: Part 1 Harry Potter and the Order of the Phoenix Harry Potter and the Half-Blood Prince	4,156
Christopher Nolan	Batman Begins The Dark Knight Rises The Dark Knight Inception Interstellar	3,960
Sam Mendes	Skyfall SPECTRE	1,989
Guy Ritchie	Sherlock Holmes: A Game of Shadows Sherlock Holmes	1,068
Ridley Scott	Prometheus The Martian	1,034
Kenneth Branagh	Thor Cinderella	993
Mike Newell	Harry Potter and the Goblet of Fire	893
Tom Hooper	Les Misérables The King's Speech	856
David Slade	The Twilight Saga: Eclipse	699
Phyllida Lloyd	Mamma Mia!	610
Sam Taylor-Johnson	Fifty Shades of Grey	571
Gareth Edwards	Godzilla	529
Rupert Wyatt	Rise of the Planet of the Apes	483
Paul Greengrass	The Bourne Ultimatum	443
Michael Apted	The Chronicles of Narnia: The Voyage of the Dawn Treader	416
Matthew Vaughn	Kingsman: The Secret Service	414
Rupert Sanders	Snow White and the Huntsman	397
Danny Boyle	Slumdog Millionaire	378
Simon J Smith	Penguins of Madagascar	374

Source: BFI RSU

WRITERS AND DIRECTORS OF UK INDEPENDENT FILMS RELEASED IN THE UK, 2003-2015

We have information on 1,457 writers and 1,120 directors associated with UK independent films released in the UK between 2003 and 2015 (not including re-releases of classic films). Almost 87% of the writers and over 81% of the directors have been associated with just one UK independent film during this time, which illustrates how difficult it is to make the leap from first to second feature and to sustain a filmmaking career (Tables 4 and 5). However, as we are looking just at UK independent films released between 2003 and 2015 it is possible that some directors and writers were involved with more films than these figures indicate. Some might have been involved with earlier films and others will have made successful independent films and gone on to work on studio-backed films. There are also likely to be some writers and directors who have made just one film so far, but will go on to make many more films. Tom Hooper is a good example of a director who appears only once in these data but who has directed more than one successful film. His one independent UK film is *The King's Speech*, the all-time highest grossing independent UK film at both the UK and worldwide box office. In addition, he has directed a number of studio-backed films, *The Damned United* and *Les Misérables* released during this period, and *The Danish Girl* which was released in 2016.

The writers who have been involved with the most independent UK films between 2003 and 2015 are Paul Laverty and Michael Winterbottom with seven films, and Noel Clarke, Frank Cottrell Boyce, James Erskine, Tony Grisoni and Ronald Harwood with six each. Sacha Bennett, Steven Knight, Nick Love, Abi Morgan, Anders Thomas Jensen and Paul Andrew Williams have written or co-written the screenplays for five independent titles, while writers involved with four films include Simon Beaufoy, Debbie Isitt, James Moran and Ol Parker.

Table 4 Numbers of films by writers of UK independent films, release years 2003-2015

Number of films written or co-written	Number of writers	% of writers
1	1,262	86.6
2	125	8.6
3	43	3.0
4	14	1.0
5	6	0.4
6	5	0.3
7	2	0.1
Total	**1,457**	**100.0**

Source: comScore, BFI RSU analysis

The directors of the highest number of UK independent films released between 2003 and 2015 were Michael Winterbottom with 12 films, Ken Loach with 10 films, and James Erskine and Stephen Frears with seven films. Marc Evans, Kevin Macdonald and David MacKenzie each directed six independent titles, while the directors of five films are Shane Meadows, Roger Michell, Oliver Parker, Jerry Rothwell and Julian Temple. (For information on the gender of writers and directors of UK films, see the report on Employment in the film industry.)

Table 5 Numbers of films by directors of UK independent films, release years 2003-2015

Number of films directed or co-directed	Number of directors	% of directors
1	909	81.2
2	139	12.4
3	44	3.9
4	16	1.4
5	5	0.4
6	3	0.3
7	2	0.2
10	1	0.1
12	1	0.1
Total	**1,120**	**100.0**

Source: comScore, BFI RSU analysis

AWARDS FOR UK FILMS AND TALENT

This section presents the awards won by British talent and UK films at the major film festivals and awards ceremonies in the 2015/16 awards cycle. The festivals included here are the Sundance, Berlin, Cannes, Venice and Toronto festivals of 2015 and the BAFTA Film Award and Academy Award® ceremonies which took place in 2016.

However, Table 6 also shows the number of awards won in calendar years 2001 to 2015, in order to provide a comparison with previous years. In 2015, UK films and British individuals won 28 awards, representing 18% of the prizes available. The number of awards won was down slightly on 2014, when 31 awards were won, representing 20% of those available. (Awards specific to foreign nationals or films, for example the Toronto Film Festival's award for Best Canadian Film, are not included in the present analysis).

Of the 28 awards presented to British films and talent in 2015, a total of nine were won or shared by British women or won by British films made by women, down from 10 in 2014.

Table 6 Numbers of UK award winners, 2001-2015/16

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
2012	23	14
2013	26	14
2014	31	20
2015	28	18
Total (to end of 2015)	**403**	
2015/16 awards cycle	***26***	***17***

Source: BFI

Table 7 lists the awards won by UK films and British talent at the major festivals in 2015 and at the 2016 BAFTA Film Awards and Academy Awards®.

British films and filmmakers won prizes at three of the five major festivals in 2015 (Table 7). There were three awards for UK documentaries and factual filmmakers at the Sundance Film Festival – the directing award (Kim Longinotto), audience award (*Dark Horse*) and grand jury prize (*The Russian Woodpecker*) – while in the dramatic competition the grand jury prize went to John Maclean's *Slow West*. At Berlin the veteran actors Tom Courtenay and Charlotte Rampling picked up the leading acting awards for their roles in *45 Years* while juries for the generation prizes awarded their top honours to two UK short films: *A Confession* (best short film, 14plus) and *Gift of My Father* (best short film, kplus). At Cannes, the UK independent film *The Lobster* won the most prestigious award at the festival behind the Palme d'Or and Grand Prix, the Prix du Jury (Jury Prize).

At the awards ceremonies in 2016, 11 BAFTAs and six Oscars® were presented to British films and talent. Kate Winslet won the best supporting actress BAFTA for her role in *Steve Jobs* while Mark Rylance won both the BAFTA and Oscar® supporting actor awards for his role in *Bridge of Spies*. Rylance was one of three double winners: Jenny Beavan won both best costume design awards for *Mad Max: Fury Road* and Asif Kapadia's *Amy* won best documentary at both ceremonies.

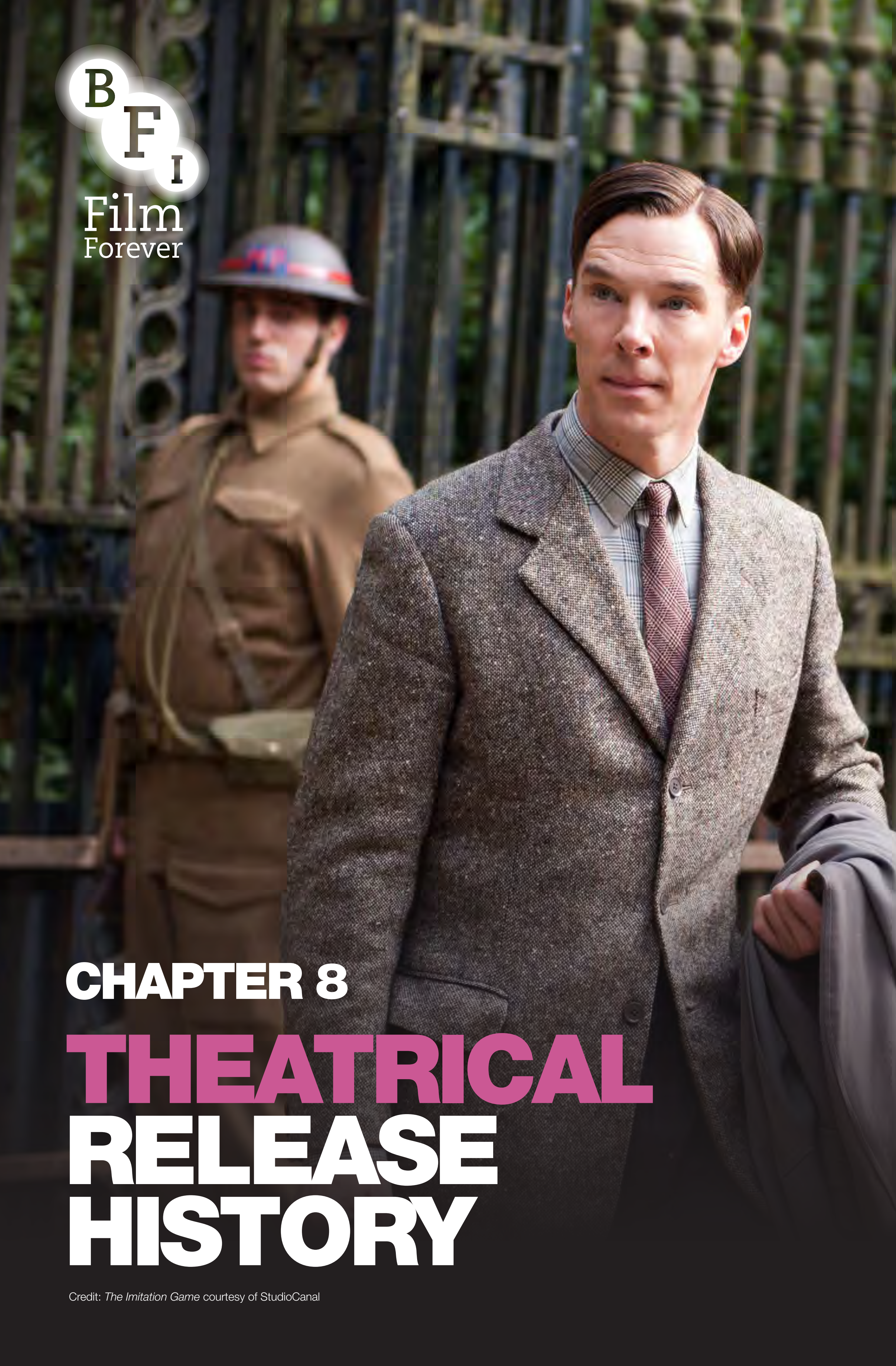
For the third year in succession, the visual effects prizes at both the BAFTAs and the Oscars® were won by teams from British VFX houses. Although in 2014 (for *Interstellar*) and 2015 (for *Gravity*) UK teams won prizes for the same film, in 2016 two different teams won the awards. Chris Corbould, Paul Kavanagh and Roger Guyett shared the BAFTA for *Star Wars: The Force Awakens*, while Andrew Whitehurst, Paul Norris, Mark Ardington and Sara Bennett won the Oscar® for *Ex Machina*. Sara Bennett was one of only three women to have been nominated for the award in its history and was the second to win. The previous winner was American VFX artist Suzanne Benson who won for *Aliens* in 1987. Bennett was the first-ever female VFX supervisor to win the award.

Table 7 UK award winners, 2015/16

Awards ceremony/festival	Award	Recipient	Title
Sundance Film Festival 22 January-1 February 2015	World Cinema Documentary Directing Award	Kim Longinotto	Dreamcatcher
	World Cinema Grand Jury Prize: Documentary	Film (Award presented to Chad Garcia)	The Russian Woodpecker
	Audience Award for World Cinema Documentary	Film Award presented to Louise Osmond	Dark Horse
	World Cinema Grand Jury Prize: Dramatic	Film Award presented to John Maclean	Slow West
Berlin Film Festival 5-15 February 2015	Silver Bear for Best Actor	Tom Courtenay	45 Years
	Silver Bear for Best Actress	Charlotte Rampling	45 Years
	Crystal Bear (*14plus* Short Film)	Film Award presented to Matt Nelson (with Petros Silvestros)	A Confession
	Crystal Bear (*kplus* Short Film)	Film (Award presented to Salam Salman)	Gift of My Father
Cannes Film Festival 13-24 May 2015	Jury Prize	Film (Award presented to Yorgos Lanthimos)	The Lobster
BAFTA Film Awards 14 February 2016	British Short Animation	Film Award presented to Emilie Jouffroy (with Nina Gantz)	Edmond
	British Short Film	Film Award presented to Caroline Bartleet, Rebecca Morgan, Vanessa White (with Yann Heckmann)	Operator
	Costume Design	Jenny Beavan	Mad Max: Fury Road
	Documentary	Film Award presented to Asif Kapadia and James Gay-Rees	Amy
	EE Rising Star	John Boyega	

Awards ceremony/festival	Award	Recipient	Title
BAFTA Film Awards 14 February 2016 (Contd)	Outstanding British Contribution to Cinema	Angels Costumes	
	Outstanding British Film	Film Award presented to Amanda Posey and Nick Hornby (with John Crowley and Finola Dwyer)	Brooklyn
	Outstanding Debut by a British Writer, Director or Producer	Naji Abu Nowar and Rupert Lloyd	Theeb
	Special Visual Effects	Chris Corbould, Paul Kavanagh and Roger Guyett (with Neal Scanlan)	Star Wars: The Force Awakens
	Supporting Actor	Mark Rylance	Bridge of Spies
	Supporting Actress	Kate Winslet	Steve Jobs
Academy Awards® 28 February 2016	Actor in a Supporting Role	Mark Rylance	Bridge of Spies
	Costume Design	Jenny Beavan	Mad Max: Fury Road
	Documentary (Feature)	Film Award presented to Asif Kapadia and James Gay-Rees	Amy
	Music (Original Song)	Jimmy Napes and Sam Smith	'Writing's on the Wall' from SPECTRE
	Short Film (Live Action)	Film Award presented to Serena Armitage (with Benjamin Cleary)	Stutterer
	Visual Effects	Andrew Whitehurst, Paul Norris, Mark Ardington and Sara Bennett	Ex Machina

Source: BFI



CHAPTER 8

THEATRICAL RELEASE HISTORY

Credit: *The Imitation Game* courtesy of StudioCanal

THEATRICAL RELEASE HISTORY AND COMPARATIVE PERFORMANCE OF INDEPENDENT DOMESTIC UK FILMS

A successful theatrical release is seen as key to a film's long-term prospects, and competition for the available cinema release slots is fierce. However, almost 80% of independent domestic UK films which are not released theatrically do reach audiences by being shown at festivals or becoming available on other platforms.

FACTS IN FOCUS

- Over half (55%) of independent domestic UK films with production budgets of £500,000 or more shot between 2003 and 2013 were released within two years of principal photography.
- The percentage of independent domestic UK films achieving a theatrical release increased with the level of budget.
- For independent domestic UK films with budgets between £2-4.9 million, the highest proportion of box office came from the UK and Republic of Ireland, but for films with budgets of £5 million or over less than a quarter came from the UK and Republic of Ireland.
- The USA and Canada generated the largest proportion of worldwide box office for independent domestic UK films with budgets of £5 million or over.
- Of the films which do not achieve a theatrical release, 79% get shown via another platform or become available on other platforms, with screenings at film festivals and releases on physical video being the most common.

THEATRICAL RELEASE OF INDEPENDENT DOMESTIC UK FILMS

This chapter looks at the theatrical release performance, in the UK and internationally, of independent domestic UK films, by budget band. Domestic UK 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 non-British companies. However, the description 'independent' means that no support is provided by the major US studios.

The reference period is the production years 2003 to 2013. (Production year is defined as the year in which principal photography begins.) We have restricted our analysis to these years because comprehensive production tracking data are available from 2003 onwards, and 2013 is the latest production year included as we base release rates on films which were released within two years of the start of principal photography. This will underestimate the final release rate, but provides a common measure for comparing films of different budget levels.

Our data on box office and theatrical release details (opening date, distributor, gross, etc) are supplied by comScore, and so the definition of release also depends on having the release data from this company. Occasionally a film might be released for a short time in a small number of venues and is not tracked by comScore. 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.

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 television, or downloaded or streamed over different digital platforms.

The theatrical release territories included in the analysis of worldwide release performance are: Argentina, Australia, Austria, Brazil, Chile, China, Colombia, France, Germany, Hong Kong, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand, Portugal, Russia, Singapore, South Korea, Spain, the UK and Republic of Ireland (one territory), the USA and Canada (one territory) and Venezuela. These 24 territories are covered because they account for the majority (86% on average across the date range, according to IHS Cinema Intelligence) of the global theatrical market, and because title-matched box office data for these territories are available.

It is possible that the 'true' release rates could be higher than shown in the following Tables, as our release information covers only the territories listed above. However, while our estimates of the release rates based on the available data might be slightly lower than the true worldwide release rates, they should be sufficient for providing accurate comparisons of release rates by production budget.

RELEASE RATE OF INDEPENDENT DOMESTIC UK FILMS IN THE UK AND REPUBLIC OF IRELAND

Of the 2,144 independent domestic UK films shot between 2003 and 2013, 598 (28%) were released theatrically in the UK and Republic of Ireland within two years of principal photography (Table 1). Looking just at films with budgets of £500,000 or more, the release rate was 55%. Release rates increased with budget, with over 90% of films made for more than £10 million achieving a UK theatrical release within two years of principal photography (39 releases from 42 productions).

Table 1 Release rates of independent domestic UK films in the UK and Republic of Ireland, by budget, production years 2003-2013

Budget band (£ million)	Number of films produced	Number released within two years of principal photography	% released	Median budget of released films (£ million)
<0.5	1,387	185	13.3	0.2
0.5 – 1.9	439	180	41.0	1.0
2 – 4.9	202	136	67.3	2.8
5 – 9.9	74	58	78.4	6.8
≥10	42	39	92.9	15.4
Total	**2,144**	**598**	**27.9**	**1.1**

Source: comScore, BFI
Notes:
Release rates subject to two-year release limit.
A film is considered to be released theatrically if it was recorded as such by comScore.

BOX OFFICE PERFORMANCE OF INDEPENDENT DOMESTIC UK FILMS RELEASED IN THE UK AND REPUBLIC OF IRELAND

Table 2 shows that, as with release rates, both the median and mean UK box office takings for independent domestic UK films increased with budget. The median box office achieved by films in the £5-9.9 million budget band during the period was just under £1.4 million, while the median for films with budgets of £10 million or over was almost £5.5 million. For films in the smaller budget bands the median box office has decreased slightly since the analysis was last carried out for the 2014 Statistical Yearbook.

Table 2 Box office performance of independent domestic UK films released in the UK and Republic of Ireland by budget, production years 2003-2013

Budget band (£ million)	Number of films released	Median box office (£ 000)	Mean box office (£ 000)
<0.5	185	6	31
0.5 – 1.9	180	23	198
2 – 4.9	136	245	1,396
5 – 9.9	58	1,390	3,678
≥10	39	5,467	9,532
Total	**598**	**48**	**1,366**

Source: comScore, BFI
Notes:
Figures shown are of independent domestic UK films released in the UK and Republic of Ireland within two years of principal photography.
Box office figures valid to March 2016.
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 grossing films. Means are also shown in the table for reference.

WORLDWIDE RELEASE RATES OF INDEPENDENT DOMESTIC UK FILMS

Table 3 shows that 28% of all independent domestic UK films shot between 2003 and 2013 were released theatrically in one or more of the 24 territories (including the UK and Republic of Ireland) covered in this analysis within two years of the start of principal photography. Again, the release rate increased with budget, with more than 90% of productions with budgets of £10 million or more achieving a release worldwide within two years of principal photography, compared with just 20% of films with budgets under £2 million.

Table 3 Worldwide release rates of independent domestic UK films by budget, production years 2003-2013

Budget band (£ million)	Number of films produced	Number released within two years of principal photography	% released	Median budget of released films (£ million)
<0.5	1,387	185	13.3	0.2
0.5 – 1.9	439	182	41.5	1.0
2 – 4.9	202	137	67.8	2.8
5 – 9.9	74	58	78.4	6.8
≥10	42	39	92.9	15.4
Total	**2,144**	**601**	**28.0**	**1.1**

Source: comScore, BFI
Notes:
Release rates are calculated two years after principal photography.
A film is 'released worldwide' if it was recorded as such in any one of the 24 comScore territories monitored (see first section for the list).

BOX OFFICE PERFORMANCE OF INDEPENDENT DOMESTIC UK FILMS RELEASED GLOBALLY

The worldwide box office performance (from 24 territories) of independent domestic UK films by budget showed similar patterns to their performance at the UK box office (Table 4). The median and mean box office increased with budget, with a median box office of over $5.5 million for films with budgets between £5-9.9 million and a median of over $46 million for films with budgets of £10 million or over.

Table 4 Box office (US$) for independent domestic UK films released in at least one of 24 territories by budget, production years 2003-2013

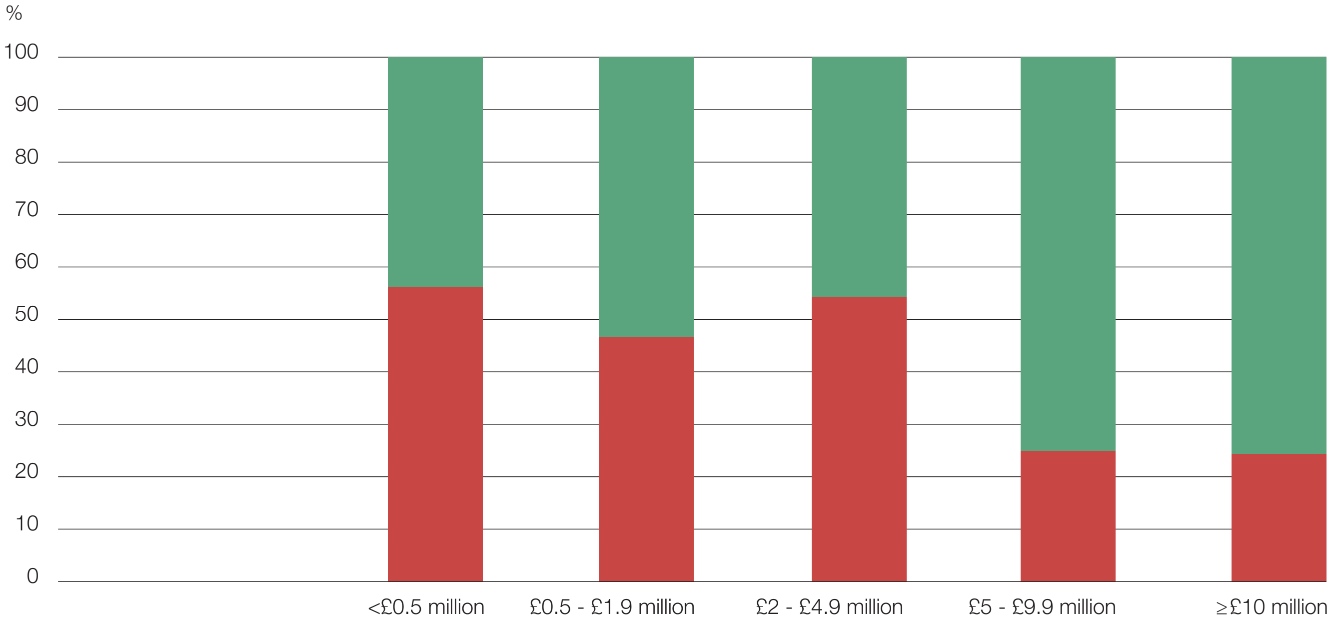
Budget band (£ million)	Number of films released	Median box office (US $ 000)	Mean box office (US $ 000)
<0.5	185	16	88
0.5 – 1.9	182	102	666
2 – 4.9	137	1,167	4,050
5 – 9.9	58	5,770	23,514
≥10	39	46,314	61,968
Total	**601**	**167**	**7,442**

Source: comScore, BFI
Notes:
Figures shown are for independent domestic UK films released in at least one of 24 comScore territories within two years of principal photography (see first section for the list).
Box office figures valid to March 2016.

LOCAL AND OVERSEAS SHARE OF BOX OFFICE OF INDEPENDENT DOMESTIC UK FILMS

Figure 1 shows the share of box office takings in the UK and Republic of Ireland and overseas for independent domestic UK films by budget. For films with budgets up to £5 million, box office takings from the UK and Republic of Ireland and from overseas were approximately equal, but for films with budgets of £5 million or more, over 75% of the total 24 territory global box office came from overseas territories.

Figure 1 Local and overseas share of independent domestic UK film box office by budget, production years 2003-2013



	<£0.5 million	£0.5 - £1.9 million	£2 - £4.9 million	£5 - £9.9 million	≥£10 million
UK and Republic of Ireland	56.2	46.7	54.3	24.9	24.4
Overseas	43.8	53.3	45.7	75.1	75.6

Source: comScore, BFI
Notes:
Release rates subject to limit of two years from principal photography.
Box office figures valid to March 2016.

Table 5 shows the relative importance of geographically grouped global territories for independent domestic UK films. The territory generating the highest share of worldwide box office during the period was North America (USA and Canada) with 29.3%, followed by the UK and Republic of Ireland (29%) and the other European territories (21.1%). The Central and South American territories generated the smallest share at 3.5%.

Table 5 Share of 24 territory worldwide box office of independent domestic UK films by grouped territories, production years 2003-2013

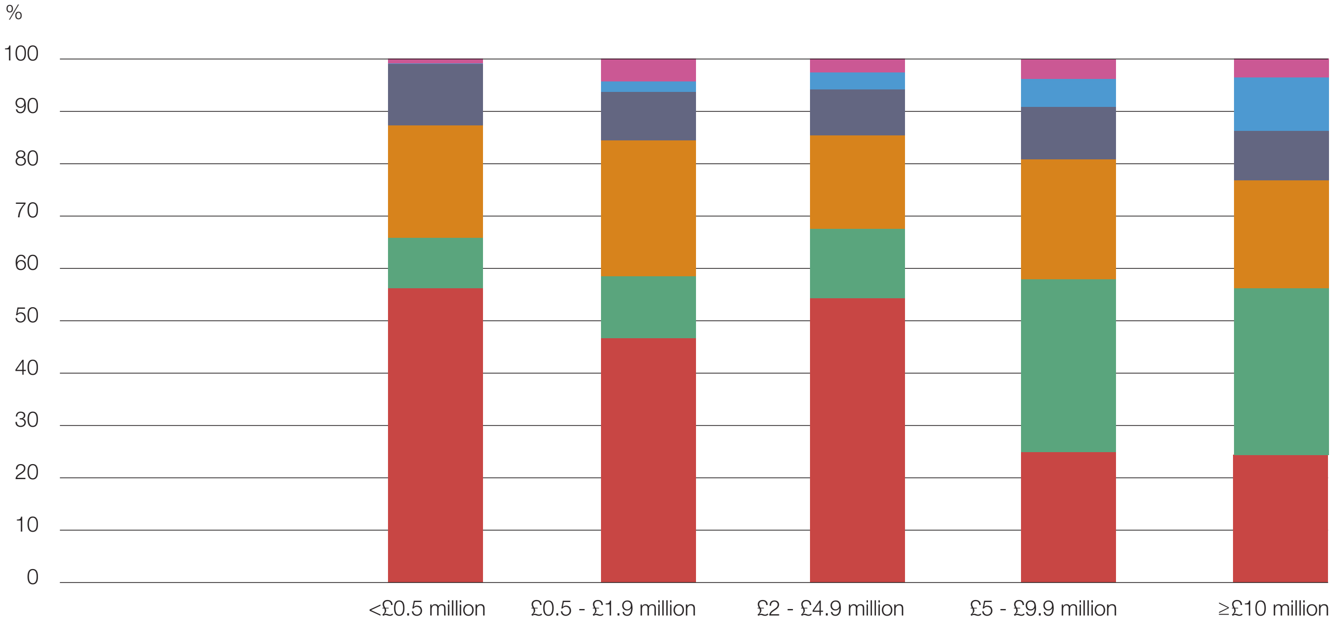
Territories	Share of worldwide box office (%)
USA and Canada	29.3
UK and Republic of Ireland	29.0
Austria, France, Germany, Italy, the Netherlands, Portugal, Russia, Spain	21.1
Australia, New Zealand	9.6
China, Hong Kong, Japan, Malaysia, Singapore, South Korea	7.6
Argentina, Brazil, Chile, Colombia, Mexico, Venezuela	3.5
Total of comScore multi-territory box office	**100.0**

Source: comScore, BFI
Notes:
Release rates subject to two-year release limit (see section 1).
Box office figures valid to March 2016.
Percentages may not sum to 100 due to rounding.

A further breakdown of worldwide box office shares, by geographically grouped territory and budget, is shown in Figure 2.

For the three lowest budget bands the pattern of box office share is very similar, with the UK and Republic of Ireland having the highest share followed by the other European territories. The pattern was different however, for films in the £5-9.9 million and £10 million and over budget bands. The territory with the highest box office share in both bands was the USA and Canada (33% and 32% respectively) followed by the UK and Republic of Ireland (25% and 24%) and the other European territories (23% and 21%).

Figure 2 Share of 24 territory worldwide box office of independent domestic UK films by grouped territories and budget, production years 2003-2013



	<£0.5 million	£0.5 - £1.9 million	£2 - £4.9 million	£5 - £9.9 million	≥£10 million
UK and Republic of Ireland	56.2	46.7	54.3	24.9	24.4
USA and Canada	9.7	11.8	13.3	33.0	31.8
Other Europe	21.4	26.0	17.9	22.9	20.6
Australia, New Zealand	11.8	9.2	8.7	10.1	9.5
Asia	0.1	2.0	3.3	5.3	10.2
Central and South America	0.9	4.4	2.5	3.8	3.5

Source: comScore, BFI
See notes to Table 5.

FILMS WHICH WERE NOT RELEASED THEATRICALLY

In this section we look at what has happened to films for which we have information on production, but not on theatrical release at any time (we do not use the release within two years of principal photography criterion in this section). As outlined previously, our data on box office and theatrical release details are supplied by comScore which does not track every limited release. 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.

We have identified 1,218 independent domestic UK films, produced between 2003 and 2013, for which we had information on production but no data on theatrical release from comScore. 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 were made available on any medium) was investigated. There are many possibilities for the outcome of a film project and Table 6 shows the number of films, by budget, 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 6 shows that, overall, at least 957 (79%) of the 1,218 films which did not achieve a theatrical release were shown on another medium or are available on some other platform.

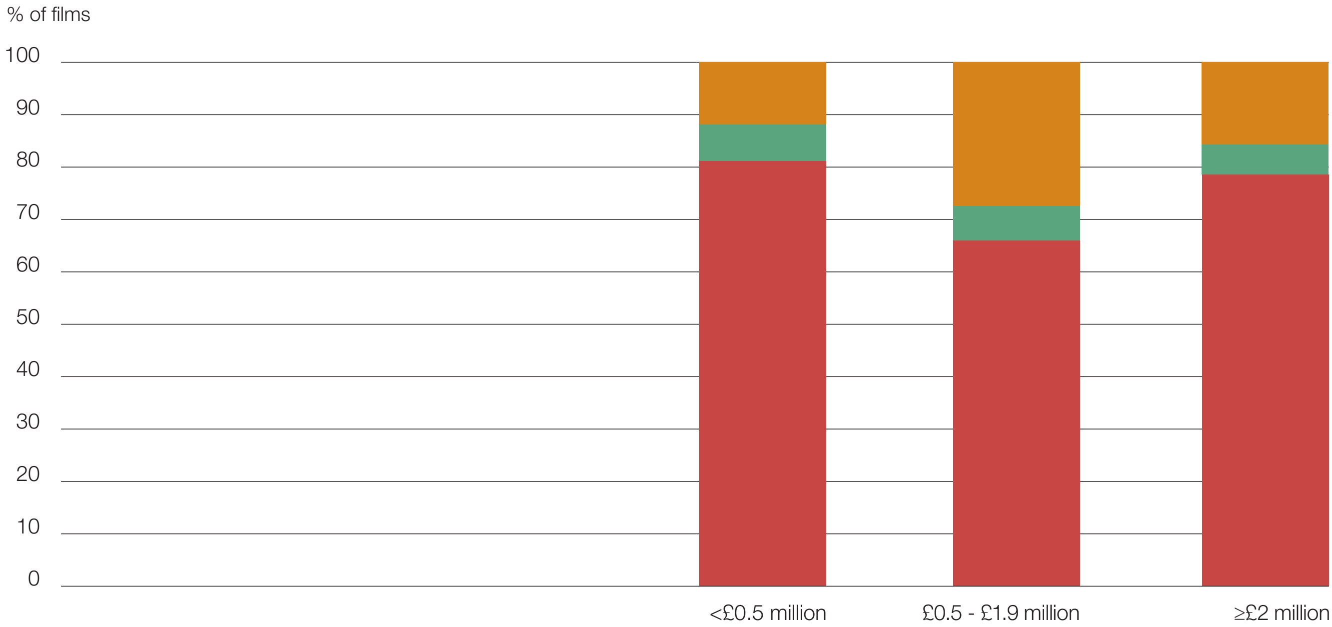
Table 6 Outcome of projects by budget for independent domestic UK films which have not been released theatrically, production years 2003-2013

	Budget			
Outcome	**<£0.5 million**	**£0.5-£1.9 million**	**≥£2 million**	**Total**
Shown/available	772	130	55	957
In production/post-production	66	13	4	83
No information	113	54	11	178
Total	**951**	**197**	**70**	**1,218**

Source BFI RSU
Note: Films which had limited releases that were not tracked by comScore are considered to be not released.

For non-released films, the percentage of films which have been shown at a small venue or festival or are available to audiences on one or more release platforms is in the range 66%-82% for all budget bands (Figure 3). Overall, nearly 80% of films have been shown or are available, and a further 7% of films are still in production/post-production.

Figure 3 Percentages of 'non-released' independent domestic UK films falling into each of three basic outcome categories by budget, production years 2003-2013

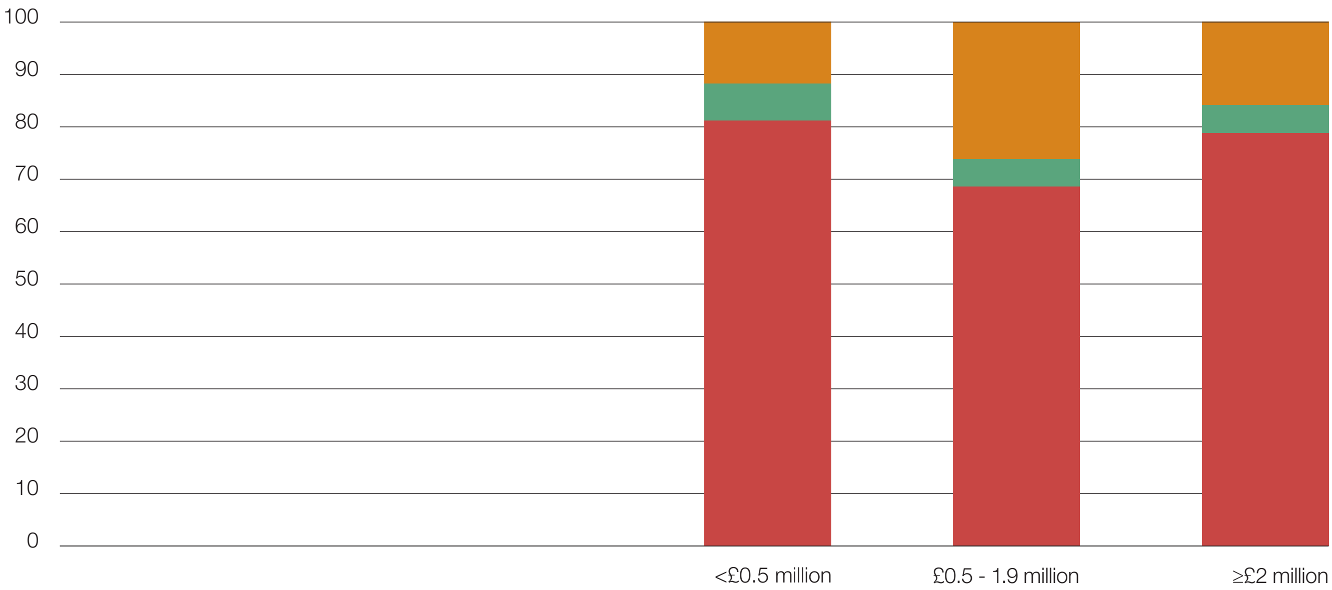


	<£0.5 million	£0.5 - £1.9 million	≥£2 million
Shown / available	81.2	66.0	78.6
In production / post-production	6.9	6.6	5.7
No information	11.9	27.4	15.7

Source: comScore, BFI
See notes to Table 6.

The amount of total budget by outcome for the non-released films shows a similar pattern to the numbers of films by outcome (Figure 4). Overall, the films which have been shown, are available or are still in production/post-production account for over 75% of the total budget for all films.

Figure 4 Percentages of total budget for 'non-released' independent domestic UK films falling into each of three basic outcome categories by budget, production years 2003-2013



	<£0.5 million	£0.5 - 1.9 million	≥£2 million
Shown / available	81.2	68.6	78.8
In production / post-production	7.1	5.3	5.4
No information	11.8	26.1	15.7

Source: comScore, BFI
See notes to Table 6.

For films that have been identified as having been shown at some venue or are available on some platform, Table 7 shows, by production period and budget, 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 video or online, and so the sums over the categories in this Table are greater than the Table totals.

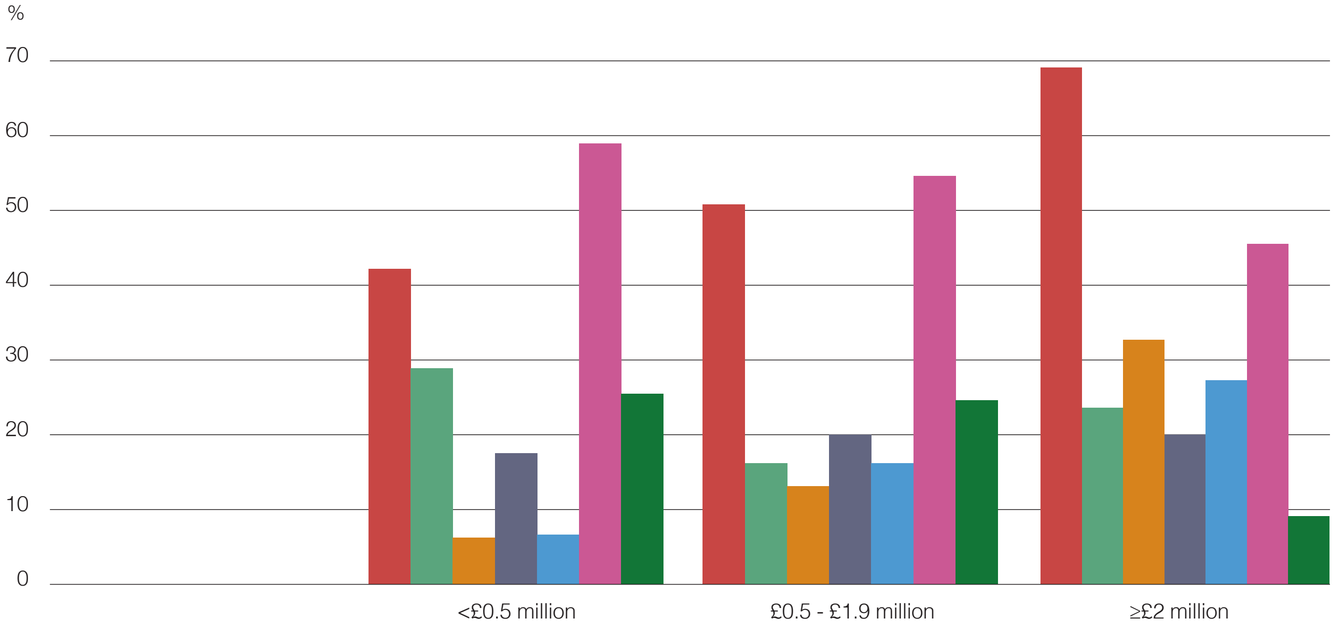
Table 7 Numbers of 'non-released' independent domestic UK films shown or available by budget, production years 2003-2013

Outcome	<£0.5 million	£0.5 - £1.9 million	≥£2 million
Available on physical video	325	66	38
Available online	222	21	13
Shown on television	48	17	18
Limited UK theatrical release	135	26	11
Worldwide release	51	21	15
Shown at film festival and other	455	71	25
Shown at film festival only	196	32	5
Total	**772**	**130**	**55**

Source: BFI RSU
Notes:
Categories may sum to more than the totals as some individual films are included in more than one category.
See note to Table 6.

For films made with budgets of £2 million or more which were not released theatrically but have been shown or are available, the most common platform on which they are available is physical video. For films in the other two budget bands, the most common platform for reaching audiences is 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.

Figure 5 Percentages of 'non-released' independent domestic UK films in each shown or availability category by budget, production years 2003-2013



	<£0.5 million	£0.5 - £1.9 million	≥£2 million
Available on physical video	42.1	50.8	69.1
Available online	28.8	16.2	23.6
Shown on television	6.2	13.1	32.7
Limited UK theatrical release	17.5	20.0	20.0
Worldwide release	6.6	16.2	27.3
Shown at film festival and other	58.9	54.6	45.5
Shown at film festival only	25.4	24.6	9.1

Source: comScore, BFI
See notes to Table 7.

CHAPTER 9
DISTRIBUTION

Image: *Jurassic World* ©2015 Universal Pictures. Courtesy of Universal Studios Licensing LLC

DISTRIBUTION

The increasingly crowded theatrical marketplace is dominated by a few very large companies. In 2015, the top 10 distributors generated over £1.3 billion in theatrical revenues, while the remainder made £59 million.

FACTS IN FOCUS

- The top 10 distributors had a 95.5% share of the market in 2015.
- The market share for distributors outside the top 10 was 4.5%.
- Weekdays (Monday to Thursday) accounted for 42% of the box office in 2015, slightly more than in 2014.
- Opening weekends represented 30% of the total box office.
- The estimated total amount spent by distributors on advertising films released theatrically was just over £192 million.
- The average advertising spend for UK studio-backed films was £1.6 million, compared with £1.3 million in 2014; the average spend for UK independent films was £0.2 million, the same as in 2014.

DISTRIBUTORS

Table 1 shows that the top 10 distributors had a 95.5% share of the market in 2015 from the release of 327 titles (35% of all releases). The share is similar to 2014 when the top 10 distributors took 96% of the total box office from 316 releases (37% of all releases). A further 121 distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2015, compared with 130 companies outside the top 10 in 2014. These distributors handled a total of 595 titles (65% of all releases) but gained only 4.5% of the total box office.

The leading distributor was Universal, which released four of the top 10 films of 2015: *Jurassic World, Minions, Fast & Furious 7* and *Fifty Shades of Grey*. Table 1 shows box office takings by distributor for all films on release during 2015, and hence includes the box office takings of titles which were released in 2014 but remained in cinemas into 2015. The second highest earning distributor in 2015 was Walt Disney which released the top grossing film of the year, *Star Wars: The Force Awakens,* and two other top 10 titles, *Avengers: Age of Ultron* and *Inside Out*.

Table 1 Distributor share of box office, UK and Republic of Ireland, 2015

Distributor	Market share (%)	Films on release in 2015	Box office gross (£ million)
Universal	21.6	44	283.5
Walt Disney	20.0	21	262.4
20th Century Fox	14.9	54	195.9
Sony Pictures	11.8	22	155.3
Warner Bros	9.0	37	118.3
StudioCanal	4.7	57	61.7
Paramount	4.0	13	52.9
Lionsgate	4.0	25	51.9
eOne Films	3.9	40	50.6
Entertainment	1.6	14	20.4
Sub-total	95.5	327	1,252.9
Others (121 distributors)	4.5	595	59.3
Total	**100.0**	**922**	**1,312.2**

Source: comScore
Notes:
The total number of films on release differs from Table 6 as it includes all films on release in 2015, including titles first released in 2014.
Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2015 to 31 December 2015.

Table 2 shows the market share for the top 10 distributors annually between 2006 and 2015. Universal, the leading distributor of 2015, held the top spot in one other year during the period, while 20th Century Fox, the leading distributor of 2014, has topped the chart three times in total over the decade. Warner Bros, which was fifth in the list of top 10 earning distributors in 2015, has headed the top 10 chart on four occasions over the period, the highest number of any distributor. The top independent distributor in 2015 was StudioCanal, whose titles included the top independent UK film of the year, *Legend, Shaun the Sheep the Movie,* and the 2014 release *Paddington*, which continued to generate considerable box office into 2015.

The same distributors consistently appear in the top 10. In all years up to 2012, with one exception, the major US studios took the leading places in the list with only six different independent distributors appearing in the top 10 over the period. However, following the consolidation of a number of the independents, this pattern is beginning to change. In 2015 StudioCanal appeared ahead of Paramount, while in 2014 both StudioCanal and eOne Films appeared ahead of Paramount and Sony Pictures. In the last few years, the share of box office generated by distributors outside the top 10 has ranged from 3.6% in 2006 to 7.8% in 2009.

Table 2 Distributor market share as percentage of box office gross, 2006-2015 (ranked by 2015 market share)

Distributor	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Universal	-	13.9	18.5	10.5	10.2	11.8	10.7	15.1	11.2	21.6
Walt Disney	15.7	10.7	9.9	12.4	14.0	8.7	10.2	15.2	10.1	20.0
20th Century Fox	20.9	13.9	9.4	16.6	15.9	12.1	16.1	13.1	21.8	14.9
Sony Pictures	16.1	8.2	12.5	11.3	6.9	7.2	18.0	8.7	6.2	11.8
Warner Bros	8.2	15.6	11.0	11.2	18.3	18.2	12.9	17.2	15.9	9.0
Optimum/StudioCanal[1]	-	-	-	-	2.2	3.8	-	2.8	6.7	4.7
Paramount	-	14.7	16.9	10.8	14.8	16.3	7.7	7.8	5.8	4.0
Lionsgate	2.4	2.3	2.5	2.9	3.5	-	5.7	4.7	5.5	4.0
eOne Films	-	-	-	4.9	5.5	5.1	6.7	9.0	8.0	3.9
Entertainment	7.9	9.5	8.0	8.6	2.5	6.7	3.1	1.9	5.2	1.6
Pathé	3.2	1.3	2.1	2.9	-	-	-	-	-	-
Momentum[2]	2.3	3.4	3.5	-	-	4.6	4.3	-	-	-
UIP[3]	18.9	-	-	-	-	-	-	-	-	-
Top 10 total[4]	96.4	94.5	94.5	92.2	93.7	94.4	95.4	95.5	96.3	95.5
Others	3.6	5.5	5.5	7.8	6.3	5.6	4.6	4.5	3.7	4.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

Notes:

[1] Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

[2] Momentum was taken over by eOne Films in January 2014.

[3] Until 2006 Paramount and Universal distributed jointly as UIP.

[4] Top 10 total refers to the top 10 distributors of that particular year.

Tables 3 to 5 show the top 10 distributors of specialised films, foreign language films and UK independent films released in 2015. The BFI considers films that do not sit easily within a mainstream commercial genre to be ‘specialised’; this includes subtitled foreign language films and most feature documentaries.

A total of 456 specialised films were released in the UK and Republic of Ireland in 2015 (60% all releases), grossing £48 million (4% of total box office). The top 10 distributors of these films released 120 specialised titles, which took £35 million at the box office (Table 3). The distributor with the largest box office share for specialised films was Eros International with a total gross of £6.8 million. It released 15 films in this category in 2015 including the highest grossing foreign language film of the year, *Bajrangi Bhaijaan*. Second in the list is Curzon Artificial Eye which released 20 specialised titles including *45 Years* and *Still Alice*. Altitude is third in the list with nine releases including the top earning documentary of the year (and the top earning specialised film overall), *Amy*. StudioCanal and Ayngaran International released the highest number of specialised films in 2015 with 30 and 23 films respectively. Ayngaran International just missed out on the list as the total box office take for its releases in 2015 was £1.2 million.

Table 3 Top 10 distributors of specialised films in the UK and Republic of Ireland, 2015 (ranked by box office gross)

Distributor	Number of specialised films released in 2015	Average widest point of release	Box office gross (£ million)
Eros International	15	51	6.8
Curzon Artificial Eye	20	26	4.7
Altitude	9	50	4.6
StudioCanal	30	27	4.0
UTV Motion Pictures	5	81	3.5
20th Century Fox	9	81	2.9
Lionsgate	4	230	2.8
Picturehouse*	9	89	2.7
BFI	12	30	1.3
B4U Network	7	28	1.3

Source: comScore, BFI RSU analysis
Notes:
The list includes distributors releasing two or more specialised films in 2015.
* The total for Picturehouse includes all takings from *The Lobster* which was released jointly with Element.

Foreign language films accounted for 37% of films released at the UK and Republic of Ireland box office in 2015. The top 10 distributors associated with these films released 122 (44%) of the total 277 titles (Table 4). French was the most popular non-English language in terms of numbers of films released in the year, with 41 titles. In terms of box office revenue, however, Hindi was the most popular non-English language with earnings of £14 million from 40 releases, followed by Tamil, which grossed £2 million from 39 releases. Distributors of films from the South Asian subcontinent – such as Eros International, UTV Motion Pictures, B4U Network and Ayngaran International – feature highly in the list.

Eros International, whose titles include the Hindi-language *Bajrangi Bhaijaan*, had the largest share of the box office overall (£6.8 million). Another distributor of Hindi-language films, UTV Motion Pictures, had the next largest share with £3.5 million. Its top earning title was the second highest grossing foreign language film of the year, *Dilwale*. Tamil film specialist Ayngaran International released the most foreign language titles (23) in the year and StudioCanal released the second highest number (22), most of which were drawn from French cinema but which also included *A Girl Walks Home Alone at Night* in Farsi.

The highest grossing non-Hindi foreign language title of 2015 was the Argentinian film *Wild Tales* (in Spanish) which was released by Curzon Artificial Eye. The company also released the top earning non-English language European film of the year, *Force Majeure* (in Swedish).

Table 4 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2015 (ranked by box office gross)

Distributor	Number of foreign language films released in 2015	Average widest point of release	Box office gross (£ million)
Eros International	15	51	6.8
UTV Motion Pictures	5	81	3.5
20th Century Fox	7	61	2.6
Curzon Artificial Eye	12	23	2.3
B4U Network	7	28	1.3
Ayngaran International	23	19	1.2
Soda Pictures	13	25	0.7
Metrodome	7	24	0.6
Qube Entertainment	11	11	0.6
StudioCanal	22	6	0.6

Source: comScore, BFI RSU analysis
Note: The list includes distributors releasing two or more foreign language titles in 2015.

The combined box office gross for all independent UK films released in 2015 was £136 million (10.5% of the total box office) from 182 releases. The 61 films released by the top 10 distributors of independent UK titles accounted for £131 million, which equates to 96% of the total box office generated by this category (Table 5). For the third consecutive year, the distributor with the largest share of the box office for UK independent films was StudioCanal, whose releases include two of the year's top three highest grossing UK independent titles, *Legend* and *Shaun the Sheep the Movie*. Second in the list is 20th Century Fox whose titles include the second highest earning UK independent film of 2015, *The Second Best Exotic Marigold Hotel*, and *Far from the Madding Crowd*.

Table 5 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2015 (ranked by box office gross)

Distributor	Number of UK independent films released in 2015	Average widest point of release	Box office gross (£ million)
StudioCanal	14	204	38.0
20th Century Fox	5	425	35.4
Lionsgate	9	266	14.1
Sony Pictures	1	553	13.0
eOne Films	10	227	12.8
Entertainment	3	350	6.0
Altitude	4	79	3.9
Universal	1	442	2.9
Picturehouse	9	89	2.7
Curzon Artificial Eye	5	41	2.1

Source: comScore, BFI RSU analysis
Note: The list includes distributors with total box office grosses for UK independent films in 2015 of over £1 million.

WIDTH OF RELEASE

Table 6 shows the numbers and percentages of releases by widest point of release from 2008 to 2015. While the total number of films released has increased each year since 2008 (with the exception of 2009), the majority of the increase is accounted for by films shown at fewer than 50 sites. Consistently, from 2008 to 2015 around 60% of releases have been shown at fewer than 50 sites, with more than one third of releases each year being shown at fewer than 10 sites. The number of films released at 500 sites or more has grown over the period, rising from nine in both 2008 and 2009 to 46 in 2015; as a proportion of total releases, the number of films in this width of release band in 2015 represented 6% of all releases compared with 2% in 2008 and 2009.

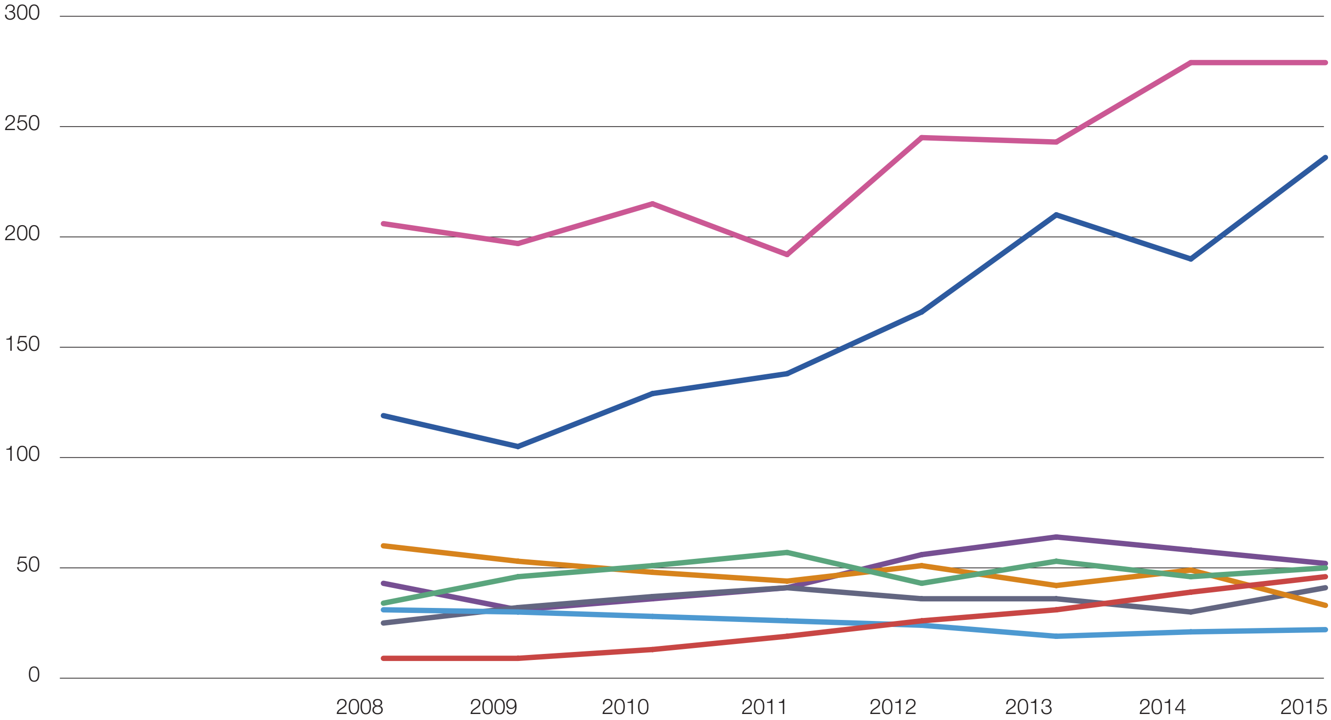
Table 6 Numbers and percentages of releases by widest point of release, 2008-2015

	2008		2009		2010		2011		2012		2013		2014		2015	
Sites at widest point of release	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases
≥500	9	1.7	9	1.8	13	2.3	19	3.4	26	4.0	31	4.4	39	5.5	46	6.1
400 – 499	34	6.5	46	9.1	51	9.2	57	10.2	43	6.6	53	7.6	46	6.5	50	6.6
300 – 399	60	11.4	53	10.5	48	8.6	44	7.9	51	7.9	42	6.0	49	6.9	33	4.3
200 – 299	31	5.9	30	6.0	28	5.0	26	4.7	24	3.7	19	2.7	21	2.9	22	2.9
100 – 199	25	4.7	32	6.4	37	6.6	41	7.3	36	5.6	36	5.2	30	4.2	41	5.4
50 – 99	43	8.2	31	6.2	36	6.5	41	7.3	56	8.7	64	9.2	58	8.1	52	6.9
10 – 49	119	22.6	105	20.9	129	23.2	138	24.7	166	25.7	210	30.1	190	26.7	236	31.1
<10	206	39.1	197	39.2	215	38.6	192	34.4	245	37.9	243	34.8	279	39.2	279	36.8
Total	**527**	**100.0**	**503**	**100.0**	**557**	**100.0**	**558**	**100.0**	**647**	**100.0**	**698**	**100.0**	**712**	**100.0**	**759**	**100.0**

Source: comScore, BFI RSU analysis
Note: Percentages may not sum to totals due to rounding.

As outlined above, between 2008 and 2015 more films were shown at fewer than 50 sites at their widest point of release than any of the higher width of release bands. To 2011, films released at the greatest number of sites (500 or more) had the lowest number of releases, but the pattern is different for 2012-2015 with fewer films being released at 200-299 sites than released at 500 sites or more. As Figure 1 illustrates, during the period the trend in the number of films released at 200-299 sites has shown a gradual decrease. In the other width of release bands (50-99, 100-199, 300-399 and 400-499 sites) the numbers of releases vary and no consistent patterns are evident.

Figure 1 Numbers of releases by widest point of release, 2008-2015



	2008	2009	2010	2011	2012	2013	2014	2015
≥500	9	9	13	19	26	31	39	46
400 – 499	34	46	51	57	43	53	46	50
300 – 399	60	53	48	44	51	42	49	33
200 – 299	31	30	28	26	24	19	21	22
100 – 199	25	32	37	41	36	36	30	41
50 – 99	43	31	36	41	56	64	58	52
10 – 49	119	105	129	138	166	210	190	236
<10	206	197	215	192	245	243	279	279

Source: comScore, BFI RSU analysis

WEEKEND BOX OFFICE

In 2015, 58.1% of box office revenue was taken at weekends (Friday to Sunday), a slight decrease from the 59.2% seen in 2014 (Table 7). The pattern of box office takings by day has remained broadly consistent with the exception of the middle of the working week, which had been boosted for most of the period by the 'Orange/EE Wednesdays' promotion. The promotion ended in February 2015: the share of box office revenues taken on a Wednesday (10.8%) across the whole of 2015 was the lowest for the period.

Table 7 Box office percentage share by weekday/weekend, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Friday	16.5	16.4	16.7	16.4	16.0	16.6	16.4	15.8	15.3	15.3
Saturday	25.1	27.8	24.4	24.0	24.1	23.8	24.1	24.9	25.2	23.9
Sunday	18.7	19.3	18.3	17.8	18.5	17.6	17.6	18.2	18.8	18.8
Weekend	**60.3**	**63.5**	**59.4**	**58.2**	**58.6**	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**
Monday	9.5	7.2	9.4	9.2	9.5	9.2	9.3	8.9	9.1	9.5
Tuesday	9.5	9.0	9.5	9.5	9.3	9.1	9.3	9.4	9.4	10.6
Wednesday	10.9	11.6	11.9	13.7	13.2	13.9	13.4	12.6	12.4	10.8
Thursday	9.7	8.7	9.9	9.5	9.3	9.8	9.8	10.2	9.8	10.9
Weekday	**39.7**	**36.5**	**40.7**	**41.8**	**41.4**	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

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

For many films the opening weekend box office represents a significant proportion of their total theatrical gross. Table 8 shows the opening weekend box office as a share of total theatrical revenue for the years 2008 to 2015. In 2015 this share was 30%, the highest of the period. The year's top film, *Star Wars: The Force Awakens*, took £33.9 million on its opening weekend (extended to four days), which represented nearly 28% of its total gross (to 21 February 2016). The film earning the highest percentage of box office receipts from its opening in the year was *SPECTRE* which generated 43% (£41.3 million) of its total gross (to 21 February 2016) from its opening weekend. This is the largest ever opening for a film in the UK, however, it is based on an unusually long seven-day period. Only one of the top 10 films of the year took less than 20% of its total box office tally on its opening weekend. This was *Inside Out*, whose opening weekend take was just under 19% of its theatrical gross (to 21 February 2016).

Table 8 Opening weekend as percentage of total box office, 2008-2015

	% of total in opening weekend							
Range of box office (£ million)	2008	2009	2010	2011	2012	2013	2014	2015
>30	21.7	18.8	27.4	29.4	27.0	24.0	27.1	32.2
20 – 30	31.0	23.0	35.8	22.6	22.4	30.9	21.9	25.9
10 – 19.9	29.2	32.2	26.1	27.6	24.6	27.6	30.9	25.6
5 – 9.9	27.6	26.1	26.7	26.2	26.1	28.4	25.9	28.7
1 – 4.9	27.4	30.3	30.4	32.2	31.8	32.1	30.3	32.3
0.2 – 0.9	34.1	35.5	31.9	35.5	37.7	37.0	36.7	37.3
<0.2	34.8	36.5	34.8	38.5	37.8	38.3	40.0	39.6
All films	**27.3**	**26.1**	**28.6**	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**

Source: comScore, 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.

RELEASE COSTS

The opening weekend is recognised as being crucial to the success of a film, both in cinemas and on subsequent release platforms. A good opening weekend, for example, may encourage exhibitors to continue to screen a film which is particularly important for independent films which do not have the backing of the major studios.

Distributors invest heavily in advertising across all media (outdoor posters, print media, television, radio and online) in order to raise a film's profile with potential audiences. The estimated total advertising spend by distributors in 2015 was just over £192 million, down 2% from £195 million in 2014 (Table 9). However, there were 759 film releases in the UK and Republic of Ireland in 2015 compared with 712 in 2014, so the average advertising spend per film decreased from £0.27 million to £0.25 million. (2015 saw increasing use of partner media advertising and social media engagement to promote film releases, but these new approaches are not fully captured in the current release cost methodology.) TV spend has increased by 38% since 2007 while the spend on outdoor advertising, press and radio has fallen by 7%, 21% and 12% respectively over the same period. While the fall in internet advertising spend appears significant, it should be noted that the Nielsen Media Research methodology for collecting online advertising spend data changed during the period. The method, applied in October 2014, significantly reduces the estimation of online advertising spend from Q2 2013 onwards.

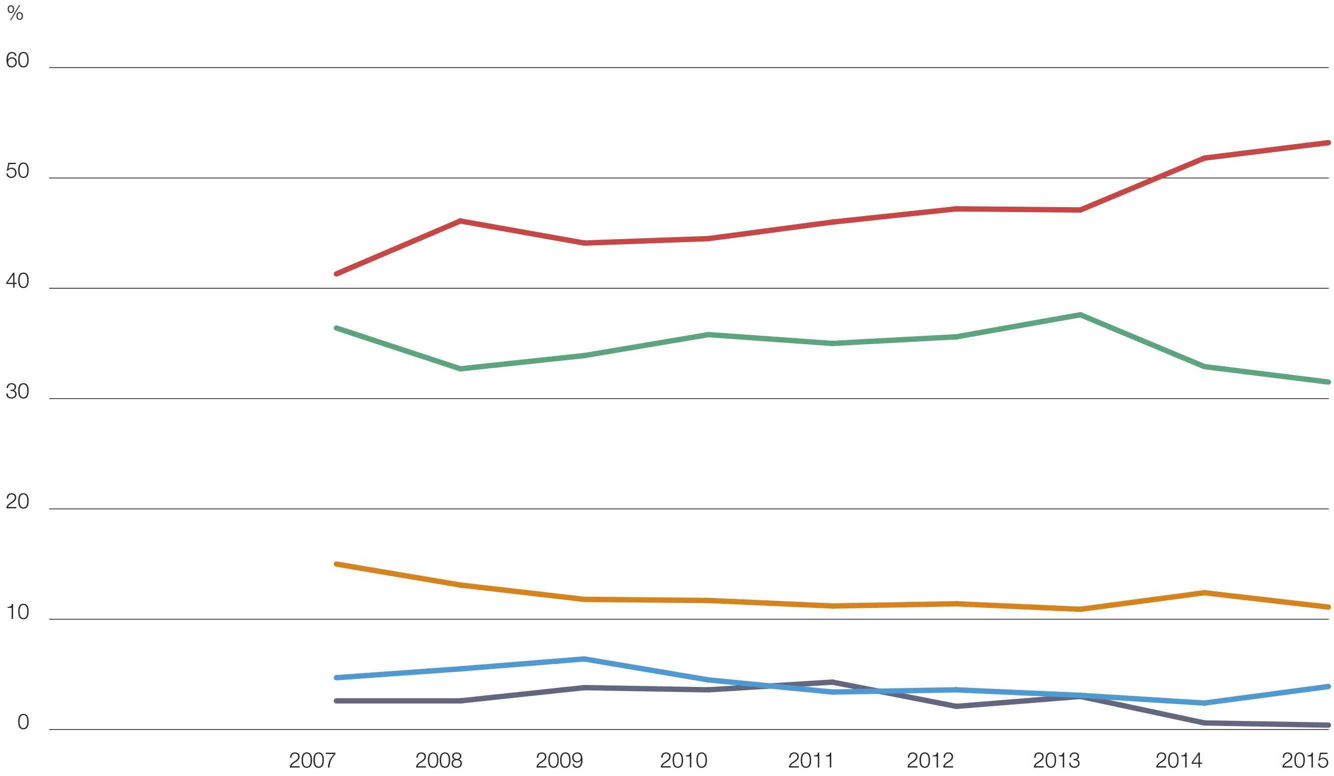
Table 9 Estimated advertising spend 2007-2015

(£ million)									
Medium	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
TV	74.1	79.3	74.3	76.0	90.8	89.1	89.2	101.0	102.2
Outdoor	65.3	56.2	57.0	61.0	69.1	67.2	71.2	64.2	60.5
Press	27.0	22.6	19.9	19.9	22.0	21.5	20.7	24.2	21.3
Radio	8.4	9.4	10.7	7.6	6.8	6.8	5.9	4.6	7.4
Sub-total	**174.8**	**167.5**	**161.9**	**163.5**	**188.7**	**188.1**	**187.8**	**194.0**	**191.4**
Internet	4.7	4.5	6.4	6.1	8.5	4.0	*2.5*	*1.1*	*0.7*
Total	**179.5**	**172.0**	**168.3**	**170.6**	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**

Source: Nielsen Media Research
Notes:
Figures may not sum to totals due to rounding.
The figures for 2013 onwards are not historically comparable as these were calculated on the basis of a different methodology.

Figure 2 shows the percentage share of advertising spend by medium between 2007 and 2015. Over the period the highest proportion of advertising spend has been allocated to TV and outdoor advertisements. In 2015, the combined proportion of spend on these two media represented 82% of all advertising spend, with TV alone accounting for over 50% of the total for the second time in the period. The share of spend on press advertising has been on a downward trend over the period; in 2015, it represented just over 11% of total spend, compared with 15% in 2007. In all years except 2011, advertising on the internet accounted for the lowest proportion of spend compared with other media. The change in the Nielsen Media Research methodology for collecting internet advertising spend data means that it is not possible to compare online spend year on year.

Figure 2 Percentage share of advertising spend by medium, 2007-2015



	2007	2008	2009	2010	2011	2012	2013	2014	2015
TV	41.3	46.1	44.1	44.5	46.0	47.2	47.1	51.8	53.2
Outdoor	36.4	32.7	33.9	35.8	35.0	35.6	37.6	32.9	31.5
Press	15.0	13.1	11.8	11.7	11.2	11.4	10.9	12.4	11.1
Radio	4.7	5.5	6.4	4.5	3.4	3.6	3.1	2.4	3.9
Internet	2.6	2.6	3.8	3.6	4.3	2.1	3.0	0.6	0.4

Source: Nielsen Media Research

Approximately £56 million was spent on advertising British films in 2015, up from £50 million in 2014, although more UK films were released in 2015 than in 2014 (209 compared with 156). The advertising spend for studio-backed UK films was £28 million (£1.5 million per film on average, compared with £1.3 million in 2014). Our data on advertising spend for individual films show that the amount spent on advertising independent UK films was £29 million (an average of £0.2 million per film, the same as in 2014), but this is likely to be an underestimate as some advertising spend for smaller films is not allocated to individual titles but to generic spend by distributor.

Using the information on advertising spend, and estimating print and Digital Cinema Package (DCP) costs, the total release costs for various release widths can be estimated. When all cinema screens used 35mm prints, we estimated print costs at £1,000 per print. However, at the end of 2015 all UK cinema screens were equipped for digital projection. Working 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. Although it is likely that producing a digital print is cheaper than producing a 35mm print, no in-depth research has been carried out on the average cost for a combination of digital and 35mm prints, taking account of these extra costs. In the absence of any empirical data on the current average cost, we have continued to use the same estimate as when all prints were analogue.

So, keeping the estimate of a typical cost of £1,000 per print and adding the Nielsen Media Research advertising spend estimate (+20% for other public relations campaigns, publicity and premiere costs), the average release cost for different levels of theatrical release can be calculated (Table 10). The average cost of release for films shown across the widest number of cinemas (500+) in 2015 was £2.87 million, down slightly (2%) from £2.94 million in 2014. There was a large drop (22%) in average release costs in the next category (400-499), which could be a result of new partnership media advertising and social media activity not being fully captured in the data. There was a slight decline in average release costs in all other categories when compared to 2014.

Table 10 Estimated release cost by width of release, 2009-2015

Number of sites at widest point of release	Average release cost 2009 (£ million)	Average release cost 2010 (£ million)	Average release cost 2011 (£ million)	Average release cost 2012 (£ million)	Average release cost 2013 (£ million)	Average release cost 2014 (£ million)	Average release cost 2015 (£ million)
500+	3.40	2.65	3.14	3.13	3.04	2.94	2.87
400 – 499	2.05	2.09	2.17	1.99	2.04	2.04	1.59
300 – 399	1.32	1.24	1.38	1.28	1.15	1.21	1.30
200 – 299	0.84	0.77	0.82	0.83	0.76	0.76	0.72
100 – 199	0.51	0.33	0.31	0.36	0.30	0.35	0.25
50 – 99	0.21	0.20	0.16	0.12	0.13	0.18	0.12
10 – 49	0.06	0.04	0.05	0.04	0.03	0.05	0.03
<10	0.01	0.01	0.01	0.01	0.01	0.01	<0.01

Source: Nielsen Media Research, comScore, 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.

Table 11 shows the average release cost by production budget for the 159 UK films released in 2015 for which budget information is available. The average release costs increased with the size of the production budget, with the largest increase being seen between films in the £0.5–£9 million budget range and those made for £2–£4.9 million. The highest budget films are most likely to have the highest promotional spend, in particular the large scale inward investment films backed by the major US studios which have considerable marketing budgets. In the top budget band, the average release cost for studio-backed films was £2.6 million and the average release cost for independent films was £1.4 million.

Table 11 Estimated release cost by budget for UK films, 2015

Budget (£ million)	Number of films	Average release cost (£ million)
10+	31	2.07
5 – 9.9	13	1.29
2 – 4.9	21	0.43
0.5 – 1.9	27	0.05
<0.5	67	0.02
All films	**159**	**0.58**

Source: Nielsen Media Research, BFI RSU analysis
See note to Table 10.

CHAPTER 10
EXHIBITION

Image: *Bajirao Mastani* courtesy of Eros International

EXHIBITION

The overall number of screens in the UK continues to rise, mainly due to the increasing number of multiplex cinemas. However, augmenting commercial cinema is a thriving voluntary sector in film exhibition, and film society admissions are highest in areas less well served by commercial cinemas.

FACTS IN FOCUS

- At the end of 2015, the UK had 4,046 screens, 137 more than 2014, in 751 cinemas.
- There were just over six screens for every 100,000 people, the same as in 2014, but lower than countries such as the USA (12.6), France (8.7), Australia (8.6), Spain (7.4) and Italy (6.5).
- Only 7% of screens showed mainly ‘specialised’ (ie non-mainstream) programming, while 0.1% of screens were dedicated to South Asian films.
- According to IHS, since 2014 all screens in the UK have been equipped for digital projection.
- Over two fifths (44%) of community cinemas which responded to the latest Cinema For All annual survey saw an increase in their annual admissions compared with the previous year; 31% recorded roughly the same number.
- The average ticket price at commercial cinemas was £7.19.

UK CINEMA SITES

Figure 1 shows the number of cinema sites in the UK from 2006 to 2015. The total number of sites has fluctuated over the period with a low of 697 in 2006 and a high of 769 in 2012. This fluctuation has mainly been driven by changes in the number of traditional and mixed use sites (mixed use screens are used for film screenings only part of the time). The number of these sites has decreased from a high point of 481 in 2012 to 435 in 2015. The number of purpose-built multiplex sites, however, has steadily risen from 249 in 2006 to 316 in 2015. There were 751 cinemas in the UK in 2015, 42% of which were multiplexes.

Figure 1 UK cinema sites by type of site, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Multiplex	249	258	269	275	278	285	288	295	301	316
Traditional and mixed use	448	469	457	448	438	460	481	461	449	435
Total sites	**697**	**727**	**726**	**723**	**716**	**745**	**769**	**756**	**750**	**751**
% multiplex sites	35.7	35.5	37.1	38.0	38.8	38.3	37.5	39.0	40.1	42.1

Source: Dodona Research, BFI RSU analysis
Notes:
Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.
Mixed use cinemas are used for screenings only part of the time.

UK SCREENS

As Figure 2 shows, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) has risen every year since 2006. In 2015, the total number of screens stood at 4,046, a rise of 137 compared with 2014.

The UK has gained 584 multiplex screens and 22 traditional and mixed use screens since 2006. In 2015, there were 3,096 multiplex screens and 950 traditional and mixed use screens. The percentage of multiplex screens increased from 73% in 2006 to 77% in 2015.

Figure 2 UK cinema screens by type of cinema, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Multiplex	2,512	2,578	2,689	2,735	2,767	2,833	2,851	2,915	2,959	3,096
Traditional and mixed use	928	936	921	916	904	934	966	952	950	950
Total sites	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**
% multiplex sites	73.0	73.4	74.5	74.9	75.4	75.2	74.7	75.4	75.7	76.5

Source: Dodona Research, BFI RSU analysis
See notes to Figure 1.

SCREEN LOCATION

In 2015, 97% of all screens in the UK were located in town or city centres, 'edge of centre', 'out of town' or suburban locations.

Table 1 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 2015, there were increases in the numbers of screens in all locations compared with 2014. The largest increase was seen in 'out of town' cinemas, where there were 78 new screens, an increase in provision of 5.8% compared with 2014.

Table 1 Screens by location, 2006-2015

Location	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% change 2014-2015	Average no. of screens per site
Town/city centre	1,555	1,616	1,683	1,732	1,726	1,785	1,848	1,866	1,901	1,932	1.6	4.2
Out of town	1,262	1,284	1,303	1,297	1,311	1,335	1,310	1,328	1,335	1,413	5.8	9.9
Edge of centre	478	486	499	498	506	518	523	534	540	561	3.9	9.0
Suburban	40	30	30	27	28	28	27	26	25	26	4.0	1.9
Rural	105	98	95	97	100	101	109	113	108	114	5.6	1.6
Total	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**3.5**	**5.4**

Source: Dodona Research, BFI RSU analysis

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 2015, the UK figure was 6.3 screens per 100,000 people, up from 6.1 screens in 2014. This level of access to screens falls short of the numbers in other major film territories: USA (12.6), France (8.7), Australia (8.6), Spain (7.4) and Italy (6.5). Germany's screen density, at 5.7 screens per 100,000 people, is less than the UK's (source: IHS).

Table 2 shows the number of admissions per person in a number of major film territories. The UK saw more admissions per person (2.6) than Spain, Germany and Italy despite having a lower screen density than Spain and Italy. Of the major territories, the USA (3.9) and Australia (3.6) had the highest admissions per person.

Table 2 Admissions per person in major film territories, 2006-2015 (ranked by 2015 admissions)

	USA	Australia	France	UK	Spain	Germany	Italy
2006	4.3	4.0	3.2	**2.6**	2.7	1.7	1.6
2007	4.3	4.0	3.0	**2.7**	2.6	1.5	1.7
2008	4.1	3.9	3.2	**2.7**	2.3	1.6	1.7
2009	4.2	4.1	3.4	**2.8**	2.4	1.8	1.6
2010	4.0	4.1	3.5	**2.7**	2.2	1.5	1.8
2011	3.8	3.8	3.6	**2.7**	2.1	1.6	1.7
2012	3.9	3.7	3.4	**2.7**	2.0	1.7	1.5
2013	3.8	3.7	3.2	**2.6**	1.7	1.6	1.6
2014	3.6	3.3	3.1	**2.4**	1.9	1.5	1.5
2015	3.9	3.6	3.1	**2.6**	2.0	1.7	1.6

Source: IHS

SCREEN DENSITY AND ADMISSIONS PER PERSON IN THE UK

As in previous editions of the Yearbook 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.

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 2015 using these television regions are presented in Table 3. The population estimates for the ISBA regions are based on 2011 census data and so the UK total shown in the Table is lower than the UK population shown in Table 4 which is based on the official mid-2014 population estimates. The lower UK population total figure shown in Table 3 also results in the figures for screen density and admissions per person shown in the Table being different to the corresponding IHS estimates.

Although London had the highest numbers of screens and sites, its screen density, at 7.0 screens per 100,000 people, was lower than that of Northern Ireland (11.3) and Central Scotland (7.4) and only slightly higher than the Wales and West (6.7) and Lancashire (6.4) ISBA regions. The North East had the lowest screen density (4.8) among all ISBA regions.

Table 3 Screens and admissions by ISBA TV region, 2015 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (000)*	Admissions (000)	Admissions per screen	Admissions per person
Northern Ireland	11.3	203	5.0	28	1,798	5,764	28,393	3.2
Central Scotland	7.4	267	6.6	39	3,626	11,206	41,969	3.1
London	7.0	904	22.3	161	12,898	43,136	47,716	3.3
Wales and West	6.7	326	8.1	71	4,876	12,358	37,907	2.5
Lancashire	6.4	456	11.3	64	7,151	16,622	36,453	2.3
Southern	6.3	353	8.7	80	5,629	16,224	45,962	2.9
South West	6.3	116	2.9	35	1,836	4,508	38,863	2.5
Northern Scotland	6.3	82	2.0	20	1,296	3,723	45,400	2.9
Midlands	5.9	598	14.8	102	10,133	24,339	40,701	2.4
East of England	5.6	239	5.9	51	4,299	12,423	51,981	2.9
Yorkshire	5.5	329	8.1	58	5,980	13,744	41,775	2.3
Border	5.4	33	0.8	16	610	1,331	40,337	2.2
North East	4.8	140	3.5	26	2,913	6,552	46,802	2.2
Total	**6.4**	**4,046**	**100.0**	**751**	**63,044**	**171,930**	**42,494**	**2.7**

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

Notes:

*Beacon Dodsworth population estimates based on Census data 2011, and so the UK total is lower than the UK population shown in Table 4 which is the official mid-2014 population estimate.

Figures may not sum to totals due to rounding.

Table 4 gives screen information for each of the English regions, plus Scotland, Wales and Northern Ireland. Northern Ireland had the highest number of screens per 100,000 people in 2015 (11.0), followed by London (7.6), and the South East, Scotland and Wales (all with 6.7). The average number of screens per 100,000 people for England as a whole was 6.0.

Table 4 Screens and population in the nations and regions, 2015 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (000)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	203	5.0	28	1,840	11.0	7.3
London	645	15.9	114	8,539	7.6	5.7
South East	591	14.6	124	8,874	6.7	4.8
Scotland	359	8.9	65	5,348	6.7	5.5
Wales	207	5.1	50	3,092	6.7	4.1
North West	459	11.3	67	7,133	6.4	6.9
South West	343	8.5	82	5,423	6.3	4.2
West Midlands	339	8.4	53	5,713	5.9	6.4
Yorkshire and The Humber	293	7.2	52	5,360	5.5	5.6
East Midlands	221	5.5	42	4,637	4.8	5.3
North East	127	3.1	21	2,619	4.8	6.0
East of England	242	6.0	49	6,018	4.0	4.9
Others**	17	0.4	4	n/a	n/a	4.3
Total	**4,046**	**100.0**	**751.0**	**64,597**	**6.3**	**5.4**

Source: Dodona Research, Office for National Statistics (ONS), BFI RSU analysis
Notes:
*ONS Mid-year population estimates 2014.
**Others include the Channel Islands and the Isle of Man.
n/a = not available.
Figures/percentages may not sum to totals due to rounding.

Table 4 also shows that Northern Ireland and the North West had the highest averages for screens per site at 7.3 and 6.9 respectively. The South West and Wales along with ‘others’ (which include the Channel Islands and the Isle of Man) had the lowest averages for screens per site showing a tendency towards smaller cinemas and, particularly for the South West and ‘others’, proportionally fewer multiplex screens (Table 5).

TYPE OF CINEMA SCREENS BY NATION AND REGION

Table 5 provides a snapshot of variations in multiplex provision around the UK. The South East had the largest number of multiplex screens (436) in 2015, four more than London. Northern Ireland had the highest proportion of multiplex screens (92%) followed by the North West (89%) and the North East (87%). 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). London had the largest number of traditional screens but its percentage of multiplex screens, at 67%, was the second lowest in England. The proportion of multiplex screens for England as a whole was 75%.

Table 5 Cinema screens by type by nation or region, 2015 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed use	Total
Northern Ireland	186	91.6	17	203
North West	408	88.9	51	459
North East	110	86.6	17	127
Yorkshire and The Humber	239	81.6	54	293
East Midlands	177	80.1	44	221
West Midlands	271	79.9	68	339
Scotland	279	77.7	80	359
Wales	160	77.3	47	207
East of England	184	76.0	58	242
South East	436	73.8	155	591
London	432	67.0	213	645
South West	204	59.5	139	343
Others*	10	58.8	7	17
Total	**3,096**	**76.5**	**950**	**4,046**

Source: Dodona Research, BFI RSU analysis
*Others include the Channel Islands and the Isle of Man.

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 6 shows that by far the majority of screens primarily show mainstream films. In 2015, 595 cinemas with 3,760 screens showed mostly mainstream films (a 2% increase in the number of sites and a 4% increase in the number of screens compared with 2014). There were 153 sites (with 280 screens, 7% of screens) showing mainly specialised films and three cinemas (with six screens, 0.1% of screens) dedicated mainly to South Asian films. The number of screens showing mostly specialised films increased by 2% in 2015 compared with 2014, but the number of sites decreased by 7%.

Table 6 Sites and screens by programme, 2006-2015

					Sites					
Programme	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
South Asian	5	4	4	4	3	3	3	2	2	3
Specialised	157	177	168	168	163	171	177	168	165	153
Mainstream	535	546	554	551	550	571	589	586	583	595
Total	697	727	726	723	716	745	769	756	750	751
					Screens					
Programme	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
South Asian	18	10	10	10	7	7	7	4	4	6
Specialised	231	255	250	253	248	259	268	265	275	280
Mainstream	3,191	3,249	3,350	3,388	3,416	3,501	3,542	3,598	3,630	3,760
Total	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**

Source: Dodona Research, BFI RSU analysis

The majority (65%) of specialised screens were found in single, independent cinemas (ie not part of a chain). The percentage is lower than in 2014, when 72% of specialised screens were based in independent cinemas.

The pattern of programme type by location in 2015 is shown in Table 7. 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 earlier years.

Table 7 Percentages of screens by location and programme, 2015

Location	Mainstream	Specialised	South Asian	Total
Town/city centre	44.8	87.5	66.7	47.8
Out of town	37.4	2.1	-	34.9
Edge of centre	14.8	1.4	-	13.9
Suburban	0.4	2.9	33.3	0.6
Rural	2.6	6.1	-	2.8
Total	**100.0**	**100.0**	**100.0**	**100.0**

Source: Dodona Research, BFI RSU analysis

This geographical analysis is extended in Table 8, which shows the distribution of specialised screens around the UK. Screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 50% of the UK total in 2015. Scotland had 25 specialised screens and Yorkshire and The Humber had 22, accounting for 9% and 8% of such screens respectively. Northern Ireland (0.7%), the North East (2.1%) and Wales (3.2%) had the smallest percentages of specialised screens.

The six screens showing South Asian films were found in only three cinemas, two in London and the other in Leicester in the East Midlands.

Table 8 Geographical spread of specialised screens, 2015

Nation/region	Specialised screens	%
London	101	36.1
South East	39	13.9
Scotland	25	8.9
Yorkshire and The Humber	22	7.9
South West	21	7.5
East of England	16	5.7
East Midlands	14	5.0
West Midlands	13	4.6
North West	12	4.3
Wales	9	3.2
North East	6	2.1
Northern Ireland	2	0.7
Total	**280**	**100.0**

Source: Dodona Research, BFI RSU analysis
Note: Percentages may not sum to 100 due to rounding.

EXHIBITORS

The number of exhibitors that owned or programmed 20 or more screens in the UK totalled 17 at the end of January 2016, as shown in Table 9. This is four more than at the end of January 2015: the newcomers to the list are PDJ Cinemas, Savoy Cinemas, Irish Multiplex Cinemas and Parkway Entertainment.

The top 10 is comprised of the same exhibitors as at the end of January 2015, but the relative position of some of the companies has changed. Cineworld has moved ahead of Odeon to take the top place, while further down the list Cineworld/Picturehouse has moved ahead of Reel Cinemas and Merlin Cinemas has moved ahead of Movie House Cinemas. At the start of 2016, the five largest exhibitors owned 74% of all UK screens, the same share as at the beginning of 2015.

Table 9 Cinema screens by exhibitors with 20 or more screens, 2015

Exhibitor	Sites	Screens	% of total screens
Cineworld	88	880	21.7
Odeon	109	871	21.5
Vue	83	789	19.5
National Amusements	20	264	6.5
Empire Cinemas	18	183	4.5
Omniplex	11	90	2.2
Cineworld/Picturehouse	24	72	1.8
Reel Cinemas	15	62	1.5
Merlin Cinemas	13	40	1.0
Movie House Cinemas	5	39	1.0
Everyman Media Group	17	38	0.9
Curzon Cinemas	14	35	0.9
Light Cinemas	3	23	0.6
PDJ Cinemas	5	22	0.5
Savoy Cinemas	4	21	0.5
Irish Multiplex Cinemas	3	21	0.5
Parkway Entertainment	4	20	0.5
Others (17 major exhibitors and 259 independent single venue exhibitors)	315	576	14.2
Total	**751**	**4,046**	**100.0**

Source: Dodona Research
Notes:
Figures correct as at January 2016.
Percentages may not sum to 100 due to rounding.
The Odeon chain 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. It also acquired Picturehouse in 2012.
Vue, which acquired Warner Village cinemas in 2003 and the Apollo cinema chain in 2012, was sold to Canadian investors Omers Private Equity and Alberta Investment Management in 2013.
National Amusements was owned by the family of Sumner Redstone, chairman of US media giant Viacom.
The Everyman Media Group was founded in 2000. The company made its debut on the Alternative Investment Market (AIM) in November 2013.

EXHIBITOR REVENUES

Dodona Research reports that exhibitors' revenues from refreshment sales were £424.7 million in 2015, a 17% increase from 2014's £363.5 million. This substantial increase is partly a reflection of the 20% rise in box office receipts for the UK and Republic of Ireland and the wider appeal of some of the year's event movie releases such as *Star Wars: The Force Awakens* and *SPECTRE*. Other income, which includes advertising revenue, booking fees, sales of 3D glasses and auditorium rental, increased by 36% between 2014 and 2015, up from £126.9 million to £173 million.

The top five exhibitors had a 79% share of gross box office in the UK and Republic of Ireland in 2015, and 69% of the box office was shared between the top three exhibitors (Table 10).

Average ticket prices, calculated by dividing the UK-only box office gross for the year (£1,236 million) by total UK admissions (171.9 million), rose from £6.72 in 2014 to £7.19 in 2015, an increase of 7%.

Table 10 Exhibitor share of box office in the UK and Republic of Ireland, 2015

Exhibitor	Market share (%)	Box office gross (£ million)*
Odeon	24.4	321.6
Cineworld	23.9	315.4
Vue	21.1	278.6
National Amusements	5.8	76.3
Empire Cinemas	4.0	52.8
Sub-total	79.3	1,044.6
Others	20.7	272.6
Total	**100.0**	**1,317.3**

Source: Dodona Research and comScore
Notes:
* Box office gross is for all films on release in 2015. This includes titles which were first released in 2014.
Figures/percentages may not sum to totals/sub-totals due to rounding.

DIGITAL PROJECTION

DIGITAL SCREENS

According to IHS, all cinemas in the UK have been equipped for digital projection since 2014. Figure 3 shows the percentage of digital screens in the UK since 2006, when just 4% of cinemas were equipped with digital projection.

Figure 3 Percentage of digital screens, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Digital	4.1	8.2	8.5	17.4	37.8	71.0	91.7	98.4	100.0	100.0
Analogue only	95.9	91.8	91.5	82.6	62.2	29.0	8.3	1.6	0	0

Source: IHS

ACCESSIBLE CINEMA

All digitally-equipped UK cinemas now have English language subtitle/caption and audio description (ST/AD) facilities. Almost every multiplex cinema and many smaller cinemas regularly screen the latest popular releases with on-screen English language captions. Around 1,500 such screenings are provided weekly, by more than 60 exhibitors, in around 450 cinemas nationwide (more than half the total), including around 95% of multiplex cinemas. The number of accessible shows has increased by 20% since 2014, with an estimated audience of over 500,000 in 2015, generating more than £3.5 million at the box office.

Data from 'YourLocalCinema.com' show that, in 2015, 180 English language films were shown in UK cinemas with captions and 170 were shown with audio description.

Over the last decade more than 1,000 titles have been made available, including almost all of the top 10 films of each year. All of the top 20 films at the UK box office in 2015 had ST/AD tracks.

3D AND EVENT CINEMA

According to IHS, of the 4,123 digital screens in the UK at the end of 2015, 1,854 (45%) were 3D-capable digital screens. (The total number of screens differs here to the figure used previously because of the different methodologies employed by IHS and Dodona Research.) Some of the popular 3D screenings in 2015 included *Star Wars: The Force Awakens, Jurassic World, Avengers: Age of Ultron* and *The Martian*.

Table 11 shows the increasing number of 3D digital screens in the UK. The growth in such screens coincided with an increase in the availability of 3D content internationally. In 2015, 34 films were released in 3D (23 fewer than in 2014): these included 12 of the top 20 highest earning films of the year.

Table 11 3D digital screens in the UK, 2006-2015

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
2012	1,564	3,538	44.2	The Hobbit: An Unexpected Journey
2013	1,655	3,868	42.8	Gravity
2014	1,772	3,946	44.9	The Hobbit: The Battle of the Five Armies
2015	1,854	4,123	45.0	Star Wars: The Force Awakens

Source: IHS, comScore, BFI RSU analysis

Notes:

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 3D screenings.

Event cinema, alternative content or non-feature film programming has become a regular feature over recent years in the UK due to the increase in digital screens. The availability of a digital screen base has widened the range of content on the big screen, allowed for greater interactivity between the screen and the audience and has potentially improved the use of auditorium capacity during typically quiet periods. Also, since events usually have only one or two screenings they can often generate higher occupancy rates than feature films. The box office gross from events screened in 2015 was slightly up on the total generated in 2014.

Table 12 shows the numbers of events and box office takings by type of event screened in 2015. According to comScore, 119 events were screened in 2015 (128 in 2014) which took a total of £35 million at the box office (£34 million in 2014). Opera has proved consistently popular since alternative content events were first screened and in 2015 more operas were screened (30) than any other single type of event, generating a total box office of £7 million. Opera was third in the box office rankings, however, behind theatre and film/documentary, which took £12.8 million and £7.6 million respectively. The difference in total box office between theatre and film/documentary events compared with operas could partly be explained by the higher average WPR for theatre (296 for theatre; 245 for opera) and the premium prices charged (£75 per ticket) for the highest earning film/documentary event – the Secret Cinema showing of *Star Wars: The Empire Strikes Back* – which generated 83% of the total box office for this category.

Fourth in both numbers of events and in box office takings was ballet with 12 events (including performances from the Royal Ballet, the Bolshoi and Les Ballets Trockadero de Monte Carlo), which generated £3.9 million at the box office. For the first time, eSport events were part of the alternative content programme, as tracked by comScore, with two showings – *ESL One Cologne: Counter Strike 2015* and *EU LCS Summer Finals Viewing Party 2015* – taking just under £0.1 million.

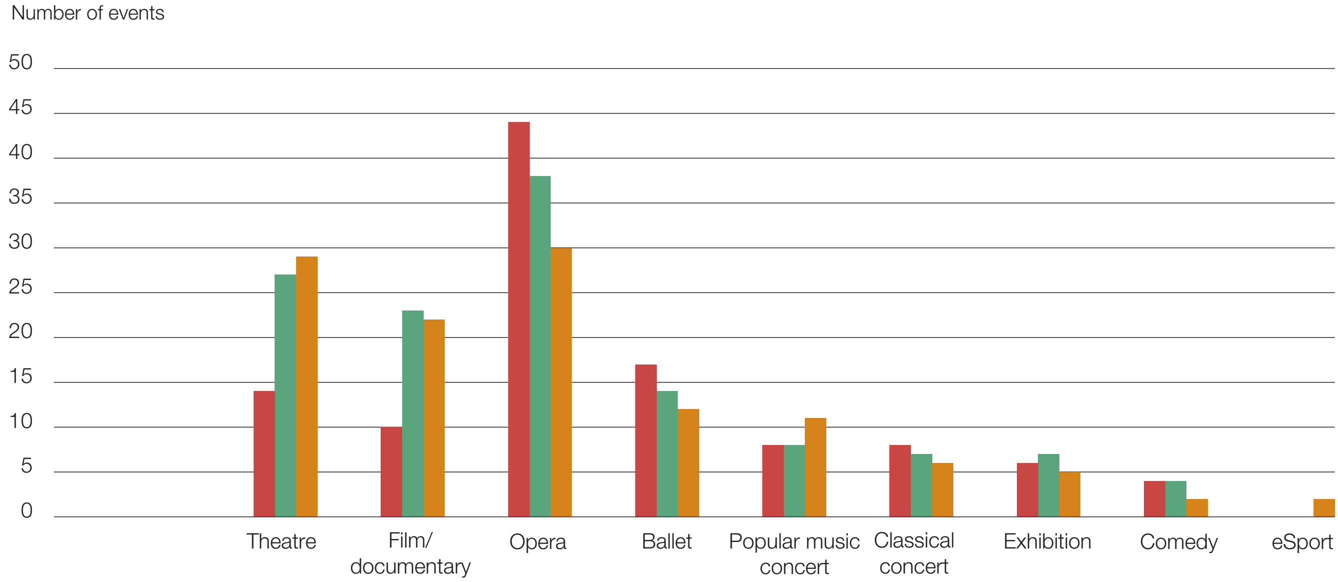
Table 12 Numbers and box office takings of events screened in UK cinemas by type of event, 2015 (ranked by box office)

Type of event	Number of events	% of events	Box office (£ million)	% box office	Average WPR
Theatre	29	24.4	12.8	36.6	296
Film/documentary	22	18.5	7.6	21.6	75
Opera	30	25.2	7.0	19.9	245
Ballet	12	10.1	3.9	11.1	246
Popular music concert	11	9.2	1.6	4.5	131
Classical concert	6	5.0	1.5	4.3	162
Exhibition	5	4.2	0.5	1.6	132
Comedy	2	1.7	0.1	0.3	95
eSport	2	1.7	<0.1	<0.1	29
Total	**119**	**100.0**	**35.0**	**100.0**	**200**

Source: comScore
Note: Percentages/figures may not sum to totals due to rounding.

Figure 4 shows the numbers of events by type of event between 2013 and 2015, and Figure 5 shows the box office takings by type of event in the same period. The number of events decreased by 7% from 2014 (128) to 2015 (119) but the box office takings increased by 4% (£33.6 million in 2014 and £35 million in 2015).

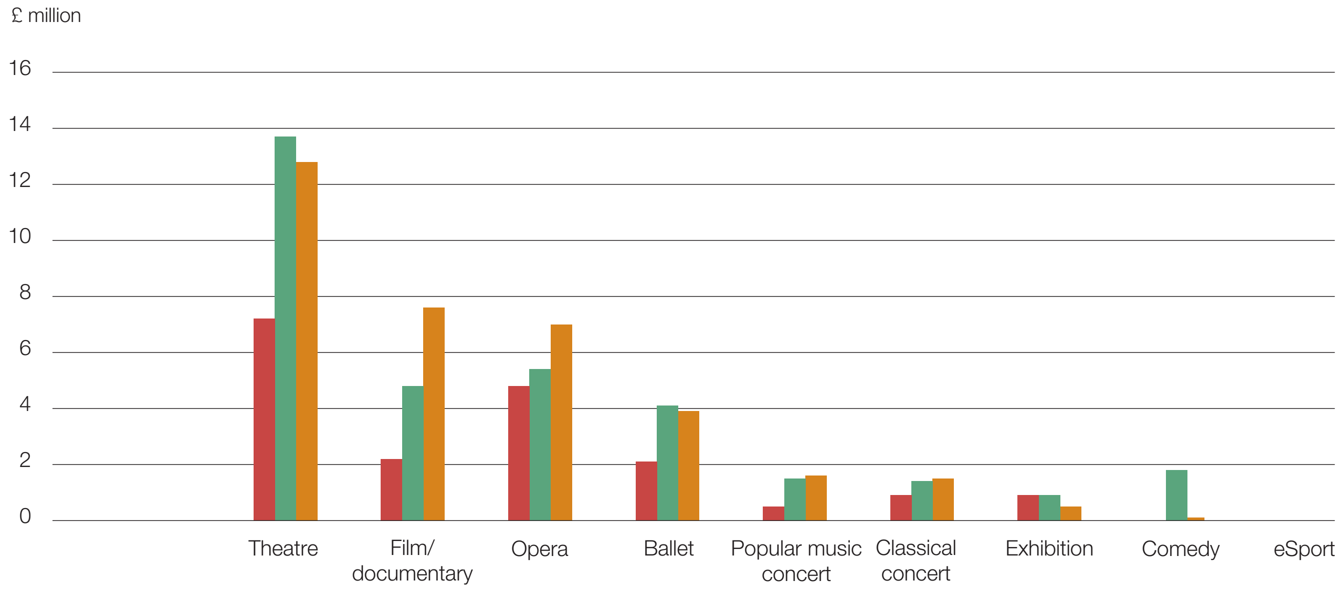
Figure 4 Events screened in UK cinemas by type of event, 2013-2015



	Theatre	Film/ documentary	Opera	Ballet	Popular music concert	Classical concert	Exhibition	Comedy	eSport
2013	14	10	44	17	8	8	6	4	0
2014	27	23	38	14	8	7	7	4	0
2015	29	22	30	12	11	6	5	2	2

Source: comScore

Figure 5 Revenues from event cinema by type of event screened in UK cinemas, 2013-2015

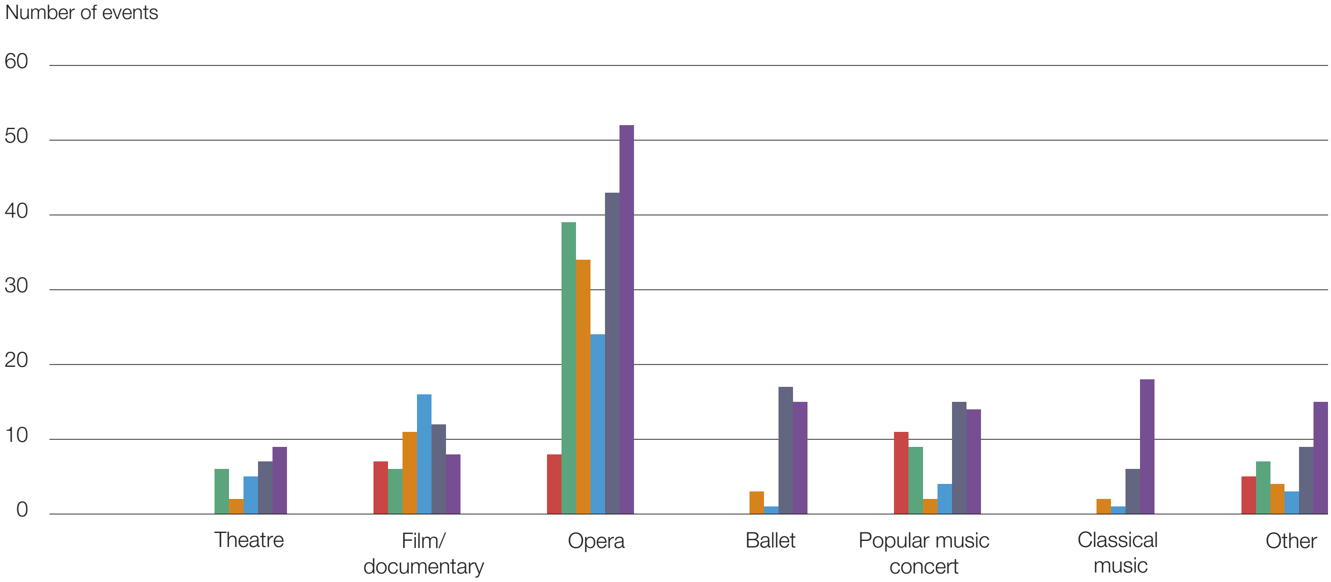


	Theatre	Film/ documentary	Opera	Ballet	Popular music concert	Classical concert	Exhibition	Comedy	eSport
2013	7.2	2.2	4.8	2.1	0.5	0.9	0.9	<0.1	-
2014	13.7	4.8	5.4	4.1	1.5	1.4	0.9	1.8	-
2015	12.8	7.6	7.0	3.9	1.6	1.5	0.5	0.1	<0.1

Source: comScore

As mentioned above, the data in Table 12 are from comScore, which now tracks box office receipts for events as well as for films. Previously published data on event cinema prior to 2013 was provided by IHS. Figure 6 shows the numbers of events, by type of event, from 2007 to 2012, using the data from IHS. Because of methodological differences in data collection between IHS and comScore, the figures from 2013 onwards are not included in the chart.

Figure 6 Events screened in UK cinemas by type of event, 2007-2012

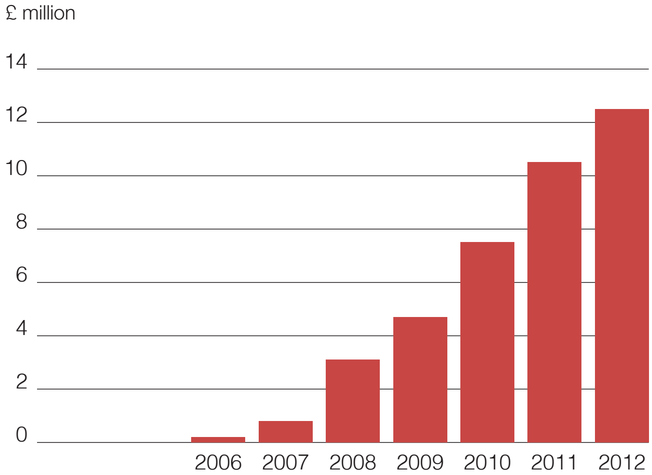


	Theatre	Film/ documentary	Opera	Ballet	Popular music concert	Classical music	Other
2007	0	7	8	0	11	0	5
2008	6	6	39	0	9	0	7
2009	2	11	34	3	2	2	4
2010	5	16	24	1	4	1	3
2011	7	12	43	17	15	6	9
2012	9	8	52	15	14	18	15

Source: IHS
Notes:
Figures include live and recorded events.
'Film/documentary' includes screenings followed by a live 'question and answer' session.

Figure 7 shows revenues from events from 2006 to 2012. Again, because the data from 2013 onwards are from a different source than the earlier data, revenues for these years are not included in the chart.

Figure 7 Revenues from event cinema screened in UK cinemas, 2006-2012



	2006	2007	2008	2009	2010	2011	2012
Total revenue	0.2	0.8	3.1	4.7	7.5	10.5	12.5

Source: IHS

COMMUNITY CINEMA IN THE UK

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

Cinema For All (formerly the British Federation of Film Societies) 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 2014/15 survey.

While many film societies and community cinemas have been in existence over a long period, new ones are established all the time. Almost three quarters (73%) of the responding organisations in the latest survey were established in 2000 or later, while 12% were established before 1970.

Most of the film societies that responded (66%) operated a membership system in 2014/15 (73% in 2013/14) and the average membership size was 130 (152 in 2013/14), but there was a wide range of membership sizes. The smallest membership was 15 and the largest was 780. Membership of film societies remains popular: 30% of cinemas saw their membership increase, whereas less than one fifth of respondents (19%) had fewer members than in the previous year. The total membership of responding societies stood at 26,151.

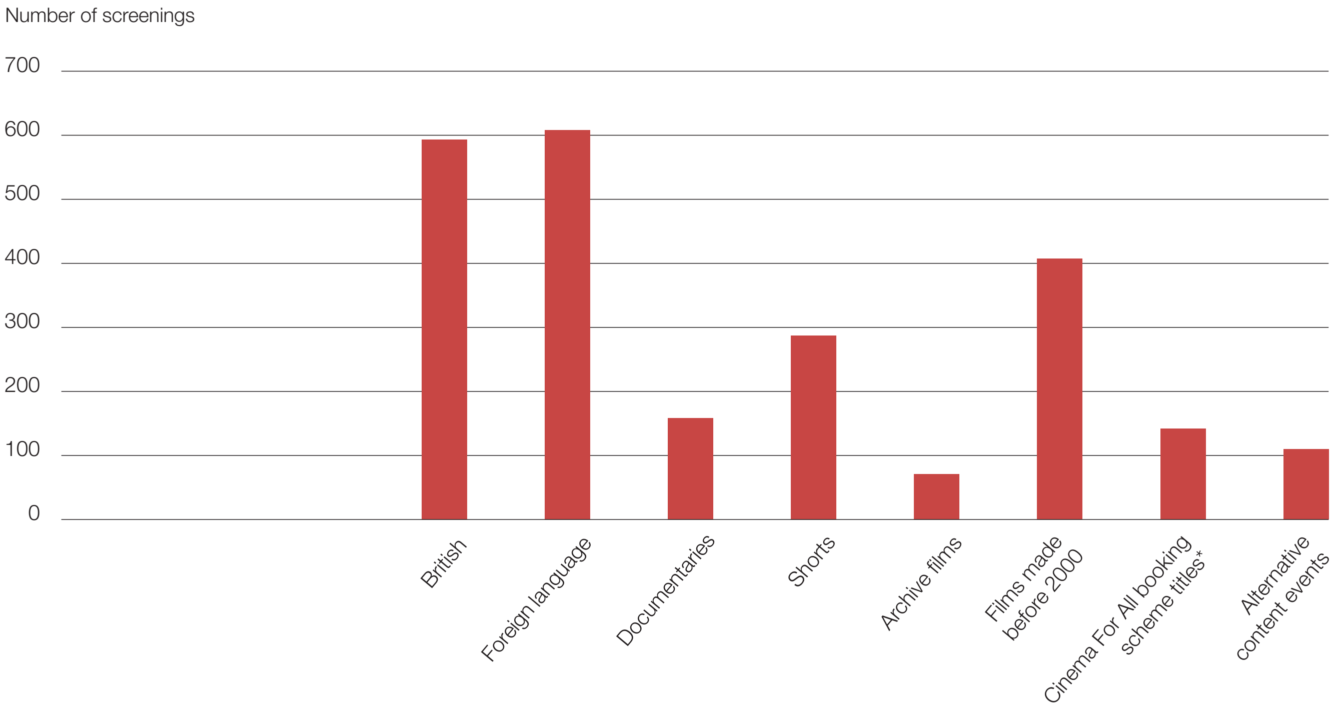
The average full annual membership fee was £24.70 (down from £29.10 in 2013/14) and 32% of societies that operated a membership system charged an additional admission fee. The average charge was £4.20, down from £4.40 in 2013/14. Just under one fifth (19%) of respondents offered season tickets (28% in 2013/14). The average cost of a season ticket was £30, and charges ranged from £10 to £64. The average number of season ticket holders in responding societies was 76 (down from 81 in 2013/14).

Most responding societies (91%) were open to non-members for a charge on the door. The average admission fee for non-members was £5.00 (the average ticket price for commercial cinemas in 2015 was £7.19).

In the 2014/15 season, the responding organisations programmed a total of 817 different titles (858 in 2013/14) across 2,558 screenings. British films accounted for 25% of the titles screened, and 26% of the films shown were in a foreign language (compared with 29% in 2013/14). Seven out of 10 of titles were screened by only one film society (the same as in 2013/14), indicating the diversity of programming choices made by individual societies. However, some titles proved popular choices across many film societies, and 37 films were programmed by 10 or more responding societies. Figure 8 shows the number of screenings by category of film. Titles sourced via the Cinema For All booking scheme accounted for 142 screenings.

Alternative content (via satellite or events recorded and delivered on Blu-ray) is increasingly available to community cinemas, and 110 events were screened by responding societies during 2014/15 (up from 83 in 2013/14).

Figure 8 Number of film society/community cinema screenings by type, 2014/15



	British	Foreign language	Documentaries	Shorts	Archive films	Films made before 2000	Cinema For All booking scheme titles*	Alternative content events
2014/15	593	608	158	287	71	407	142	110

Source: Cinema For All
Notes:
* The booking scheme provides Cinema For All members with access to a catalogue of over 650 non-mainstream films.
Figures include both film societies and community cinemas.

Of the 37 films programmed by 10 or more responding societies in 2014/15, 13 were British, and 16 were in a foreign language. The three most programmed films were *The Lunchbox* (in Hindi and English), *The Grand Budapest Hotel* (in English) and *Pride* (in English and Welsh). All three were first released in commercial cinemas in the UK in 2014. Almost two thirds (60%) of all responding organisations held special events (eg screenings with guest appearances by filmmakers or cast members, film themed social events) in addition to regular screenings in 2014/15.

The average audience size in 2014/15 was 64 (down from 75 in 2013/14), and the sum total of all admissions from responding organisations was 127,413. Over two fifths (44%) of community cinemas saw an increase in their annual admissions and 31% recorded roughly the same number.

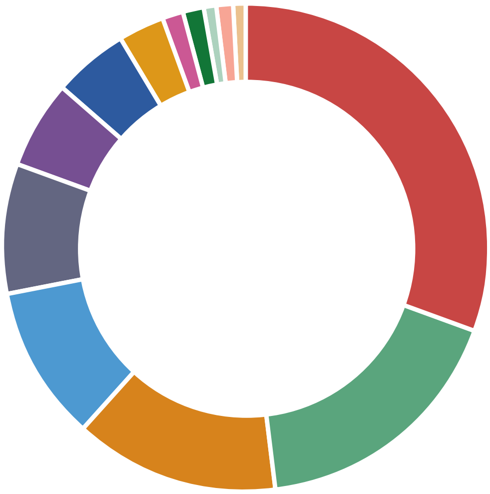
The most commonly used format for screenings was DVD (used ‘usually’ or ‘sometimes’ by 96% of responding organisations), but the shift towards the use of Blu-ray reported over previous years continued in 2014/15. In 2010/11 almost half of respondents (49%) never used Blu-ray, but in 2014/15 only 14%of responding societies never used Blu-ray. This format was ‘usually’ used for screening purposes by 51% of respondents (up from 40% in 2013/14) while 35% ‘sometimes’ screened using Blu-ray. Other formats are still used by some societies. VHS was ‘sometimes’ used by 5% of responding organisations, 35mm projection was ‘usually’ used by 1% and 8% of respondents ‘sometimes’ used 16mm projection.

The use of new digital screening formats by community cinema providers continues to grow. Screenings via digital cinema were ‘usually’ or ‘sometimes’ used by 23% of respondents (26% in 2013/14), and 20% ‘usually’ or ‘sometimes’ used online downloads/streaming (11% in 2013/14).

Figure 9 shows the percentage share of film society/community cinema admissions by nation and region in 2014/15. The South East accounted for 31% of total annual admissions from responding societies (compared with 9% of admissions to commercial cinemas in the Southern ISBA region in 2015). The South West region, which has a strong community cinema sector, accounted for 17% of film society/community cinema admissions, while the South West ISBA region accounted for just 3% of the UK's commercial cinema admissions in 2015. Conversely only 3% of film society admissions were in London, compared with the London ISBA region's 25% share of commercial cinema admissions. This provides evidence that community exhibitors enhance the provision of film in communities that have limited access to commercial cinemas.

Figure 9 Share of film society/community cinema admissions by nation and region, 2014/15

Nation/region	%
South East	30.9
South West	17.3
North West	13.6
West Midlands	10.4
Scotland	8.7
Yorkshire and The Humber	5.8
East Midlands	4.9
London	3.0
Channel Islands	1.6
East of England	1.3
North East	0.9
Wales	0.9
Northern Ireland	0.8



Source: Cinema For All

CHAPTER 11

FILM ON PHYSICAL VIDEO

Image: *Paddington* courtesy of StudioCanal

FILM ON PHYSICAL VIDEO

Despite falling revenues, particularly in the rental market, physical video remains an important element of the film value chain illustrating that audiences for film still appreciate both ownership and physical products. In 2015, non-digital feature film video sales and rentals in the UK generated just under £800 million.

FACTS IN FOCUS

- The value of sales for all categories of video on physical media in 2015 was just under £1.2 billion; sales of feature film on video accounted for £712 million.
- There were 120 million sales of all categories of video on physical media (143 million in 2014), with feature film accounting for 89 million sales.
- Film accounted for 74% of the volume of the video sales market and 66% of the value. UK films accounted for around 25% of all films sold on video.
- The most popular purchase on DVD in 2015 was *Paddington*, while on Blu-ray the best-selling title was *The Hobbit: The Battle of the Five Armies*.
- The value of the video rental market for film was £62 million in 2015, with online rental with postal delivery accounting for 85% of all feature film rental transactions.

FILM IN THE RETAIL VIDEO 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 definition used by BASE, the British Association for Screen Entertainment (formerly the British Video Association); it does not include downloads. (For information on films rented or purchased by download or streaming see the Digital Video report.)

In 2015, 120 million videos in all categories were sold in the UK, a fall of 12% compared with 2014. As Figure 1 shows, the total market value was £1,075 million, down 15% from £1,264 million in 2014. The sales of videos peaked in 2004, and since then the trends for both sales value and volume have been decreasing.

DVDs accounted for the majority of all categories of video sales (81% by value and 87% by volume). Blu-ray disc purchases accounted for 19% of total video sales by value and 13% of sales by volume in 2015, both of these figures have increased by one percent from 2014.

Feature film represented approximately 66% of the sell-through video market by value (£712 million) and 74% by volume (89 million units) in 2015. UK films accounted for around 25% of sales, by volume, of film on video.

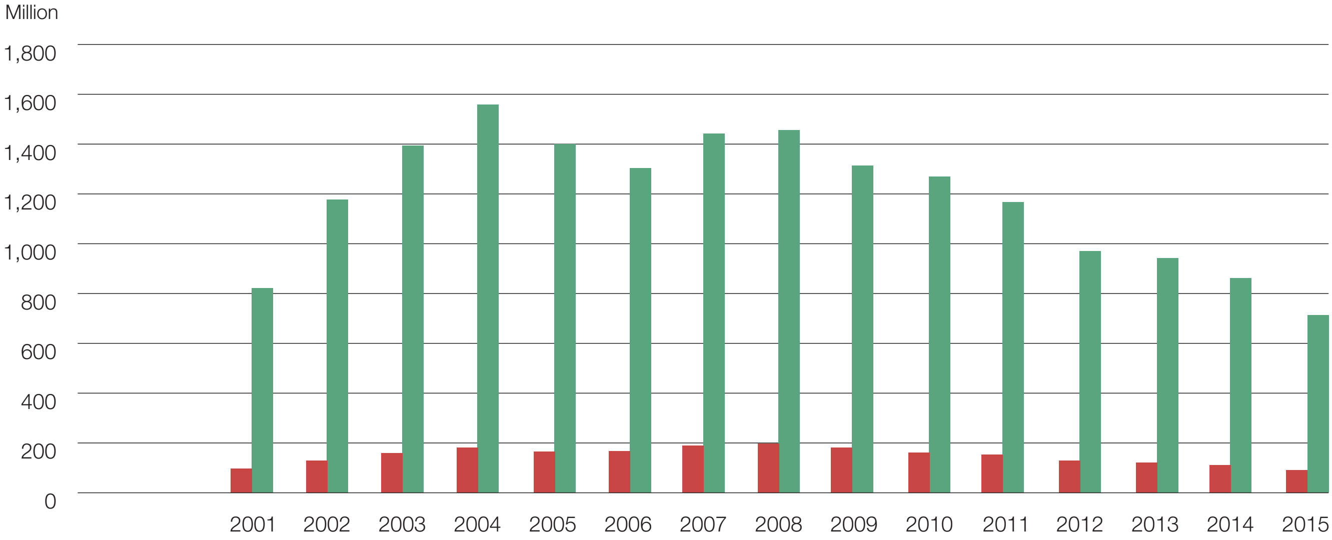
Figure 1 Retail video sales (all categories), 2001-2015

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Volume (million)	135	169	208	234	222	228	249	257	243	223	207	179	162	143	120
Value (£ million)	1,417	1,896	2,245	2,478	2,309	2,219	2,246	2,237	1,975	1,839	1,749	1,543	1,438	1,264	1,075

Source: BASE, IHS
Note: Data in this table include all categories of retail video, not only film.

The number of films sold on video more than doubled between 2001 and 2008, rising from 96 million units to a peak of 196 million, before falling back to 180 million units in 2009 (Figure 2). The decrease in sales has continued since then, with 110 million units sold in 2014 and 89 million sold in 2015.

Figure 2 Film on video retail sales, 2001-2015

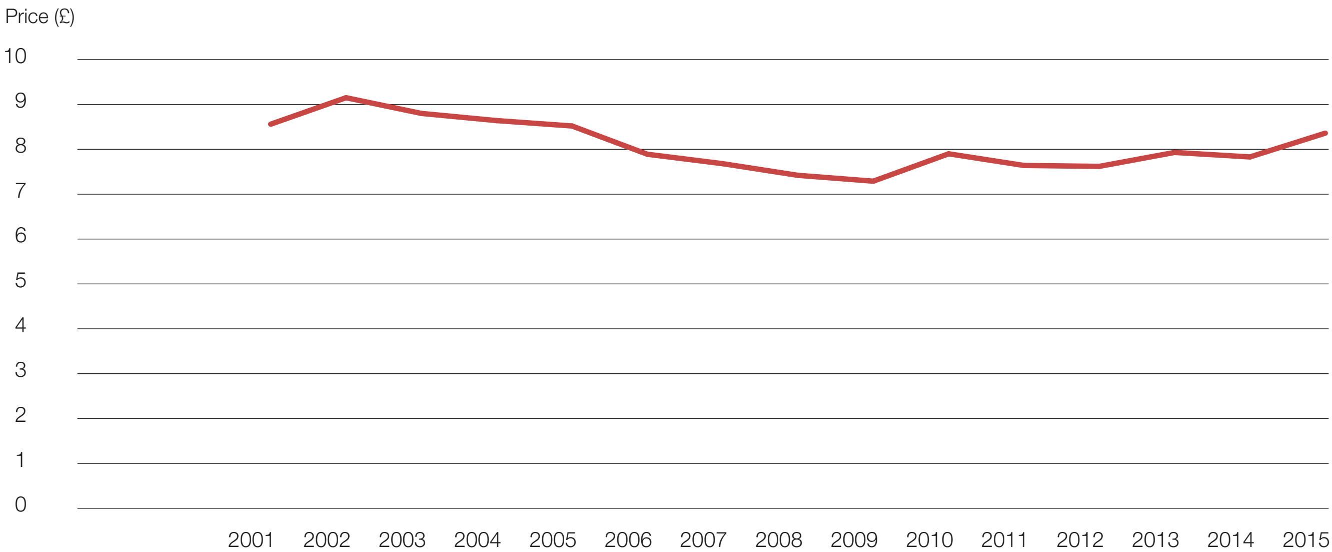


	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Volume (million)	96	128	158	180	164	165	188	196	180	160	152	127	119	110	89
Value (£ million)	821	1,175	1,392	1,557	1,399	1,302	1,440	1,454	1,311	1,267	1,165	968	940	861	712

Source: BFI RSU analysis of Official Charts Company and BASE data
Note: Includes some feature films which would be classified as 'children's' videos in the BASE Yearbook.

As Figure 3 shows, the average unit price for film on video peaked in 2002 (prices had been on an upward curve following the introduction of the DVD format in the late 1990s), but there was a general downward trend from 2002 to 2009. The average price increased to £7.90 in 2010 compared with 2009's £7.29, and stayed at similar levels until 2014. In 2015, the average price per film on physical video increased to a 10-year high of £8.36.

Figure 3 Average retail price of film per unit, 2001-2015



	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Price (£)	8.56	9.15	8.80	8.64	8.52	7.89	7.68	7.42	7.29	7.90	7.64	7.62	7.93	7.83	8.36

Source: BFI RSU analysis of Official Charts Company and BASE data

Table 1 shows the top 10 best-selling films on physical video in 2015. Six of the top 10 titles were released theatrically in 2015, and the other four were released in 2014.

At the top of the list is *Paddington*, the top earning British film at the UK and Republic of Ireland box office in 2014. The other top 10 titles released theatrically in 2014 are *The Hobbit: The Battle of the Five Armies*, *The Hunger Games: Mockinjay – Part 1* and *The Imitation Game*. None of the 2014 theatrical releases appeared in the top 10 best-selling films on video in 2014.

Jurassic World was the most popular 2015 release on sell-through video in the year. All six titles in the top 10 which were released theatrically in 2015 also feature in the year's top 20 highest box office earners.

Table 1 Top 10 best selling films on physical video formats, 2015

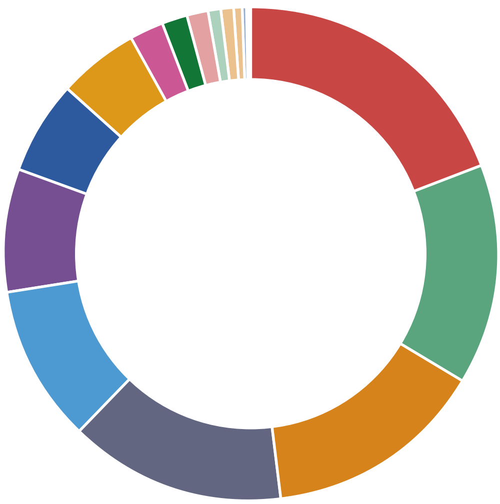
	Title	Country of origin	Distributor
1	Paddington	UK/Fra	StudioCanal
2	Jurassic World	USA	Universal
3	The Hobbit: The Battle of the Five Armies	USA/NZ	Warner Bros
4	Fifty Shades of Grey	USA	Universal
5	Minions	USA/Fra	Universal
6	Avengers: Age of Ultron	UK/USA	Walt Disney
7	Inside Out	USA	Walt Disney
8	Big Hero 6	USA	Walt Disney
9	The Hunger Games: Mockingjay – Part 1	USA	Lionsgate
10	The Imitation Game	UK/USA	StudioCanal

Source: Official Charts Company

As Figure 4 shows, the most popular genre on sell-through video in 2015 was action/adventure, which accounted for 19.4% of the market (25.5% in 2014). Drama and animation jointly were the next most popular with 14.4% of all sales, followed by comedy with 14.2%. (It should be noted that these categories, as defined by BASE, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in the Genre and Classification report.)

Figure 4 Sales of film on physical video formats by genre, 2015

Genre	%
Action/adventure	19.4
Drama	14.4
Animation	14.4
Comedy	14.2
Sci-fi	10.2
Family	8.2
Thriller	6.2
Horror	5.1
War	2.2
Musical	1.7
Fitness	1.4
Documentary	0.9
Western	0.8
Sport/health/fitness	0.5
Anime	0.4
Adult	0.1
Bollywood	<0.1
Other	<0.1



Source: Official Charts Company, BASE
Note: These genres are assigned by BASE; the categories are not the same as those in the Genre and Classification report.

The list of the top 10 UK qualifying films on physical video in 2015 includes three titles which are also in the overall top 10 films on video for the year: *Paddington, Avengers: Age of Ultron* and *The Imitation Game* (Table 2). Seven of the titles were released theatrically in 2015 and three were released in 2014.

Four of the top 10 UK performers on video are independent titles, including the second highest earning independent theatrical release at the UK and Republic of Ireland box office in 2015, *The Second Best Exotic Marigold Hotel*.

Table 2 Top 10 best selling UK qualifying films on physical video formats, 2015

	Title	Country of origin	Distributor
1	Paddington	UK/Fra	StudioCanal
2	Avengers: Age of Ultron	UK/USA	Walt Disney
3	The Imitation Game	UK/USA	StudioCanal
4	Kingsman: The Secret Service	UK/USA	20th Century Fox
5	Fury	UK/USA	Sony Pictures
6	The Theory of Everything	UK/USA	Universal
7	The Second Best Exotic Marigold Hotel	UK/USA	20th Century Fox
8	Cinderella	UK/USA	Walt Disney
9	Ant-Man	UK/USA	Walt Disney
10	Terminator Genisys	UK/USA	Paramount

Source: BFI RSU analysis of Official Charts Company data

Unlike the previous top 10 charts, the majority of titles in the top 10 UK independent films sold on video in 2015 were released theatrically in previous years, including *Paddington*, which tops the list. Seven of the titles were released in 2014 and one was released in 2012. The 2012 release, *The Best Exotic Marigold Hotel,* features in the chart for the fourth consecutive year, while the best selling independent UK film on video in 2014, *The Inbetweeners 2*, appears in the chart for a second year.

The two titles released theatrically in 2015 are *The Second Best Exotic Marigold Hotel* and *Shaun the Sheep the Movie* in second and third place respectively, which mirrors their relative rankings in the chart of top earning UK independent films at the UK and Republic of Ireland box office in 2015.

Table 3 Top 10 best selling UK independent films on physical video formats, 2015

	Title	Country of origin	Distributor
1	Paddington	UK/Fra	StudioCanal
2	The Second Best Exotic Marigold Hotel	UK/USA#	20th Century Fox
3	Shaun the Sheep the Movie	UK/Fra	StudioCanal
4	Before I Go to Sleep	UK/USA	StudioCanal
5	Mr. Turner	UK/Fra/Ger	eOne Films
6	What We Did on Our Holiday	UK	Lionsgate
7	The Inbetweeners 2	UK	Channel 4
8	The Hundred-Foot Journey	UK/UAE/USA#	eOne Films
9	The Best Exotic Marigold Hotel	UK/USA/Ind#	20th Century Fox
10	Nativity 3: Dude, Where's My Donkey?!	UK	eOne Films

Source: BFI RSU analysis of Official Charts Company data

Film made with independent (non-studio) US support.

Table 4 shows the top 10 best selling feature documentaries on physical video in 2015. This list does not include documentaries which are based on music concerts.

For the second consecutive year, documentaries about sport or sports personalities dominate the list with nine of the top 10 titles. However, the list is headed by the only non-sports related release, *Amy*, British director Asif Kapadia's film about the life of Amy Winehouse, which was also the year's most successful non-concert documentary at the UK and Republic of Ireland box office. Five of the sports-related titles focus on specific personalities including the second placed title in the list, *Ronaldo,* which was also produced by the team behind *Amy*. The other personality-based sports documentaries were films about footballer Paul Gascoigne, jockey AP McCoy, boxer Joe Calzaghe and stunt driver Ben Collins. The latter is the only film in the list that was not released theatrically in the UK. Nine of the top 10 documentaries were UK films.

Table 4 Top 10 best selling documentary films on physical video formats, 2015

	Title	Country of origin	Distributor
1	Amy	UK	Universal/Island
2	Ronaldo	UK	Universal
3	I Believe in Miracles	UK	Universal
4	Gascoigne	UK	eOne Films
5	Being A.P.	UK	eOne Films
6	The Class of '92	UK	Universal
7	Mr Calzaghe	UK	eOne Films
8	Hitting the Apex	USA	Universal
9	Building Jerusalem	UK	Kaleidoscope
10	Ben Collins: Stunt Driver	UK	Lionsgate

Source: BFI RSU analysis of Official Charts Company data
Note: Titles based on music concerts are not included.

The list of the top 10 best-selling foreign language films on physical video in 2015 is dominated by titles from the catalogue of Studio Ghibli, which celebrated the 30th anniversary of its founding during the year. The list features six titles from the renowned Japanese animation house, the top ranked of which is the 2015 theatrical release, *The Tale of the Princess Kaguya*.

The overall list is headed by the Indonesian language action thriller *The Raid 2*, which was written and directed by British filmmaker Gareth Evans. The second in a planned trilogy of Raid titles, the film also topped the chart in 2014. Two other entries from the 2014 top 10 also appear in the current list: the Swedish language black comedy *The Hundred-Year-Old Man Who Climbed Out the Window and Disappeared* and Studio Ghibli's *Howl's Moving Castle*.

Table 5 Top 10 best-selling foreign language films on physical video formats, 2015

	Title	Country of origin	Distributor
1	The Raid 2	Indonesia/USA	eOne Films
2	The Tale of the Princess Kaguya	Jap	StudioCanal
3	The Battle for Warsaw: Stones for the Rampart	Pol	Kaleidoscope
4	The Hundred-Year-Old Man Who Climbed Out the Window and Disappeared	Swe/Cro	StudioCanal
5	The Wind Rises	Jap	StudioCanal
6	Spirited Away	Jap	StudioCanal
7	My Neighbour Totoro	Jap	StudioCanal
8	Howl's Moving Castle	Jap	StudioCanal
9	Princess Mononke	Jap	StudioCanal
10	Blue Is the Warmest Colour	Fra/Bel/Spa	Curzon Artificial Eye

Source: BFI RSU analysis of Official Charts Company data

Classic titles, in particular classic family films, also remain popular video purchases, due in part to theatrical re-releases or other events associated with the films. Walt Disney titles *Beauty and the Beast, Cinderella, The Jungle Book, The Lion King, The Little Mermaid,* and *Snow White and the Seven Dwarves* all sold well on video in 2015, helped in part by a prolonged promotion with major retailers and also, in the case of *Cinderella,* by the successful theatrical release of a live action remake.

A number of box sets of films from successful franchises achieved substantial sales on video in 2015 following the release of new episodes, including the original and prequel Star Wars trilogies and the Jurassic Park trilogy. There were also substantial sales for the Back to the Future trilogy which coincided with 'Back to the Future Day' on 21 October 2015, the date to which the protagonists travelled in the second instalment.

FILM IN THE VIDEO RENTAL MARKET

The peak value of the physical rental market for film was £494 million, which was achieved in both 2001 and 2002; the value of the market in 2015 was just under one eighth of that (Figure 5). There were 22 million rental transactions of feature film on physical video in 2015, a fall of 24% compared with 2014's 29 million. The value of the market was £62 million, down from £87 million in 2014. The decrease in the market's value is due mainly to the rapid decline of over-the-counter rentals in the face of competition from multi-channel television and subscription Video on Demand (eg services such as Netflix and Amazon Prime).

The average value of a physical video rental in 2015 was £2.78, and online renting of physical discs (with postal delivery) accounted for 85% of rental transactions.[1]

Figure 5 Film on video rental market, 2001-2015

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Transactions (million)	198	183	160	159	138	116	98	96	98	93	93	87	50	29	22
Value (£ million)	494	494	462	476	399	340	295	284	285	278	262	221	146	87	62

Source: IHS, BASE

[1]Due to declining volumes, information on the top 10 online film video rentals and a breakdown of rentals by genre are not presented in this year's report.

CHAPTER 12

FILM ON DIGITAL VIDEO

Image: *Fast & Furious 7* © 2015 Universal Pictures. Photograph Scott Garfield

FILM ON DIGITAL VIDEO

Digital video enables audiences to access films through a range of devices, anytime, anywhere. Revenues for on-demand services in the UK continued to increase in 2015, generating just under £500 million.

FACTS IN FOCUS

- In 2015, the overall digital video market for film in the UK was estimated to be worth £499 million, up 14% on 2014, and up over 700% since 2004.
- Revenues from online digital video services increased year on year by 11% to £315 million, while television-based revenues increased by 21% to £163 million.
- Subscription services accounted for almost half of online film revenues, and digital rental revenues remain higher than those of digital retail for the second year in a row.
- In 2015, Netflix and Apple retained their position as the highest earning digital video providers in the UK.
- Analysis of the library content of five digital video suppliers in the UK showed that over two thirds (68%) of available titles were from the USA, while 11% were UK productions.
- In 2015, 34% of adult internet users (16+) watched or downloaded films or television programmes online at least once a week.

AVAILABILITY OF COMPREHENSIVE DATA ON FILM ON DIGITAL VIDEO

Although digital video (Video on Demand) is now a firmly established part of the film value chain in the UK, our understanding of the market is hampered by a lack of publicly available robust data. Reliable data for on-demand services are limited to revenue and business aggregates, supplemented by survey data on consumer behaviour and preferences. Within the existing data, however, it is not always possible to clearly distinguish between feature films and television programmes – a consequence of increased convergence within the entertainment market.

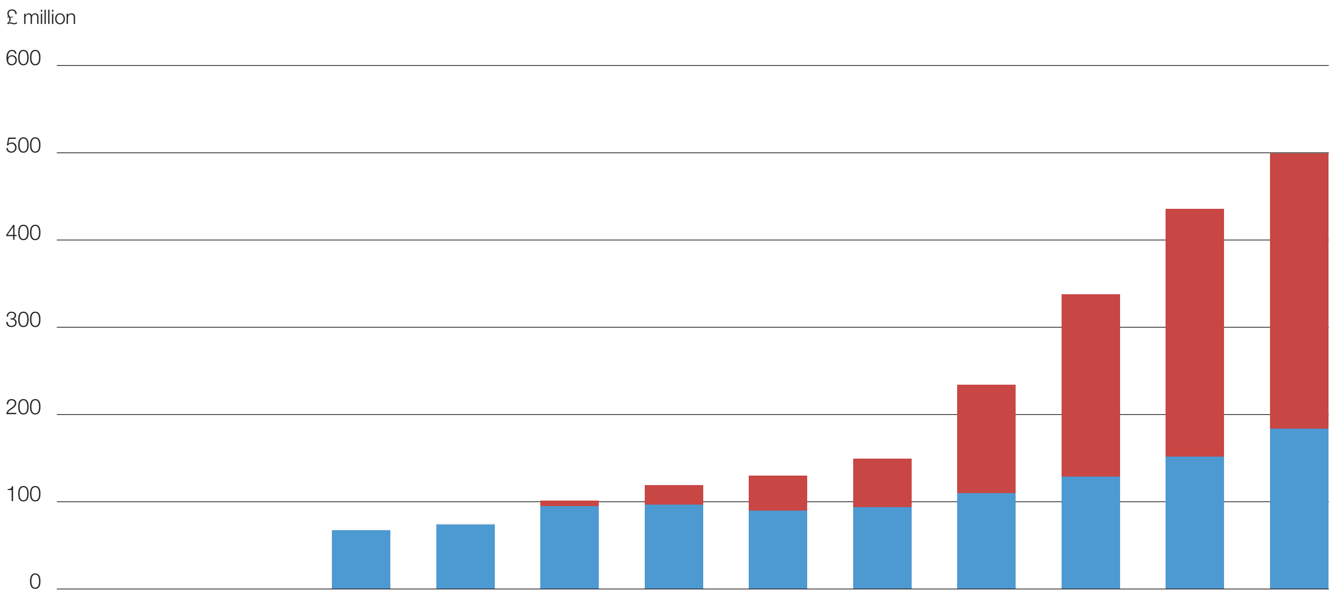
VALUE OF FILM ON DIGITAL VIDEO

According to IHS, the estimated value of the on-demand market for film in the UK in 2015 was £499 million, an increase of 14% compared with 2014. As Figure 1 shows, the size of the market in 2015 was more than double that of 2012 and over seven times that of 2006.

Revenues from online on-demand services (such as Netflix and Apple) have been greater than those generated by television-based services (including BT, Sky and TalkTalk) since 2012. In 2015, online revenues were estimated to have been £315 million, up 11% compared with 2014 (£284 million) while television-based revenues in 2015 were estimated to have been £184 million, up 21% compared with 2014 (£152 million).

The value of the overall on-demand film market represented approximately 12% of the total UK filmed entertainment market in 2015, an increase of one percentage point on the previous year.

Figure 1 Estimated value of the digital video film market in the UK, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Television-based digital video	67	74	95	97	90	94	110	129	152	184
Online digital video	0	1	6	22	40	55	124	209	284	315
Total	**67**	**75**	**101**	**119**	**130**	**149**	**234**	**338**	**436**	**499**

Source: IHS
Figures have been amended since publication of the 2014 Statistical Yearbook.

On-demand service providers in the UK employ three basic types of business model:

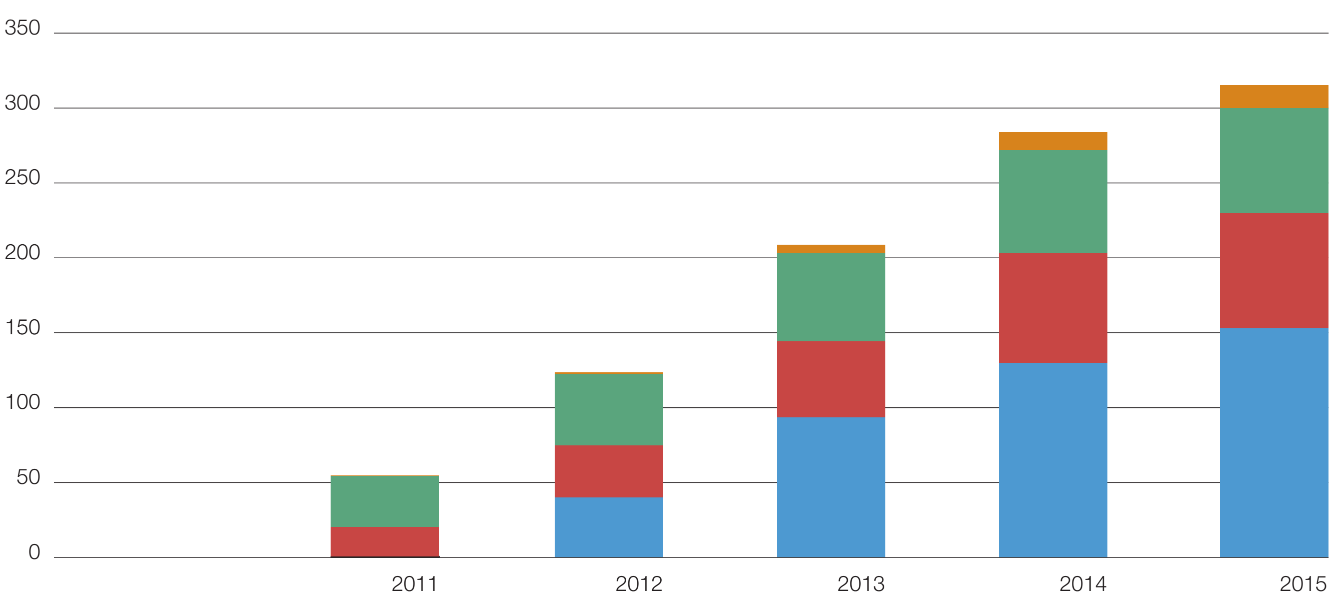
- Transactional (TVoD) which comprises rental digital video, a one-off rental for a limited time, including both streaming and download-to-rent (DTR) and retail or download-to-own video (DTO), also known as electronic-sell-through (EST) – most providers of transactional on-demand services, such as iTunes or Google Play offer both rental and retail film content, however some services such as Curzon Home Cinema deal exclusively with rental content;

- Subscription (SVoD) which provide unlimited access to content for a fixed monthly sum – providers include Netflix, Amazon Prime Video and BFI Player+; and

- Free/advert-supported – providers include catch-up services such as BBC iPlayer and All4.

IHS estimates that subscription services accounted for 49% of online film revenues in the UK in 2015, followed by digital rental (24%) and digital retail (22%) This was the second consecutive year that digital rental revenues were higher than those of digital retail, a reversal of the situation in all previous years. The percentage of overall revenues generated by advertising increased steadily between 2011-2015, growing from less than half of one percent at the start of the period to nearly 5% in 2015 (Figure 2).

Figure 2 Online digital video film revenue by type of service, 2011-2015



	£ million	%	£ million	%	£ million	%	£ million	%	£ million	%
Subscription	0.8	1.5	40.2	32.5	93.7	44.9	130.0	45.8	152.8	48.5
Digital rental	19.7	36.1	34.6	28.0	50.8	24.4	73.3	25.8	76.9	24.4
Digital retail	33.9	62.1	48.0	38.8	58.7	28.1	68.9	24.3	70.2	22.3
Advertising	0.2	0.4	0.8	0.6	5.4	2.6	11.7	4.1	15.2	4.8

Source: IHS

TOP PROVIDERS OF DIGITAL VIDEO SERVICES

In the absence of film-by-film data, this section outlines the top providers of digital video services in the UK in 2014 and 2015. Providers are ranked by revenue for all on-demand services, not just film – it is possible that rankings based solely on film revenue would be different (Table 1). In both years, Netflix and Apple were the two highest earning providers of on-demand services in the UK. The biggest change between the two years was the rise of Now TV from sixth place in the chart to third, which pushed Sky into fourth place. However, it is worth noting that Now TV is owned and run by Sky – if the two services were ranked as a single entity, it would have been the second largest provider in 2015 after Netflix.

Table 1 Top transactional and subscription film and television programme digital video service providers in the UK, 2014 and 2015 (ranked by revenue)[1]

Rank	2014		2015	
	Company	Country of ownership	Company	Country of ownership
1	Netflix	USA	Netflix	USA
2	Apple	USA	Apple	USA
3	Sky	UK/USA	Now TV*	UK/USA
4	Virgin	UK/USA	Sky	UK/USA
5	BT Vision	UK	Amazon	USA
6	Now TV*	UK/USA	Virgin	UK/USA
7	Amazon	USA	BT Vision	UK
8	Microsoft	USA	Microsoft	USA

Source: IHS
Notes:
[1] Revenue figures are not disclosed as these are confidential.
* Now TV is a non-contract on-demand service owned and run by Sky.

POPULARITY OF ON-DEMAND FILM AND TELEVISION PROGRAMME SERVICES

The most recent Ofcom Communications Market Report (published August 2016) identified a continued growth in the use of on-demand services in the UK. In the second half of 2015, six in 10 UK adults (59%) claimed to have used at least one service in the previous 12 months, up by two percentage points since 2014. The most popular on-demand service in the same period was the BBC iPlayer, with around one third (32%) of adults using the service within the previous year, while Sky was the most popular pay-TV provider with 16% of adults using its service. Netflix, which was also used by 16% of adults, was the most popular of the non-broadcaster services in the UK and recorded the highest year-on-year growth across all services, with a rise of four percentage points compared with 2014.

FILM CATALOGUES ACROSS DIFFERENT DIGITAL VIDEO PROVIDERS

According to Ofcom's Communications Market Report, access to film library content is among the primary motivators for the use of SVoD services in the UK, with 38% of Netflix subscribers and 27% of Amazon Prime Video subscribers citing access to back catalogues of films as a reason for using the service, while 27% of Netflix subscribers and 23% of Amazon Prime subscribers cited access to new film content as a reason to use the services.

In October 2015, the European Audiovisual Observatory (EAO) conducted research into the composition of the catalogues of 75 VoD and 16 SVoD suppliers across the 28 member states of the European Union. The study found that 27% of the films available on the VoD services were European productions, compared with 59% for films originating in the USA, while on the SVoD services 30% of films were of European origin, compared with 60% for US films. In more than 40 of the VoD catalogues, all of the available titles were non-European (originating either from the USA or other international territories).

Table 2 shows the titles that appear with the greatest frequency in the VoD catalogues surveyed by the EAO and their countries of origin. (The Table lists titles that appear in over 45 of the 75 catalogues.)

Table 2 Most popular titles in VoD catalogues across European territories

Number of catalogues in which title is present (/75)	Film	Year of release	Countries of origin
50	American Sniper	2014	USA
50	Run All Night	2015	USA
49	Fast & Furious 7	2015	USA/Jpn/Chn
48	Horrible Bosses 2	2014	USA
47	Inherent Vice	2014	USA
47	Seventh Son	2014	UK/USA/Can/Chn
46	Get Smart	2008	USA
46	Journey 2: The Mysterious Island	2012	USA
46	Prince of Persia: The Sands of Time	2010	UK/USA
46	The Fast and the Furious	2001	USA/Ger
46	Valentine's Day	2010	USA

Source: EAO, BFI

The EAO research found that pan-European services adapt the films they offer to suit the tastes of consumers in the individual countries in which they operate, and that the availability of European national films on both VoD and SVoD platforms was strongly linked to national production levels in each respective country.

Figure 3 shows the territory of origin of films in the catalogues of five digital video services (both VoD and SVoD) operating in the UK. The majority of titles were from the USA (68%) which is higher than the EU averages for both VoD (59%) and SVoD (60%) services. European titles accounted for 20% of the available films, which includes 11% from the UK, 8% from other EU countries and 1% from non-EU European countries. This is lower than the proportions of European titles available on VoD (27%) and SVoD (30%) EU based digital video services. Twelve per cent of the available titles came from territories outside of Europe or the USA. (It is worth noting that these territories of origin were ascribed by the EAO so may be different to BFI definitions.)

Figure 3 Territory of origin of films in selected VoD and SVoD catalogues in the UK, 2015

Territory of origin	% of films
UK	11
EU (excluding the UK)	8
Other European	1
Other international	12
USA	68

Source: EAO
Notes:
Territory of origin is defined by the EAO and may differ from BFI definitions.
Providers analysed are: iTunes, ChiliTV, Netflix, Wukai.TV & Curzon Home Cinema.

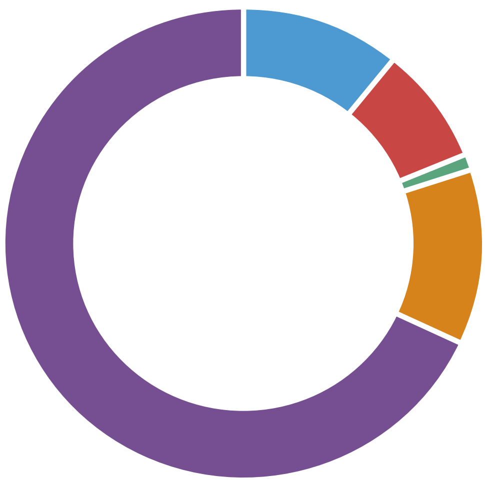
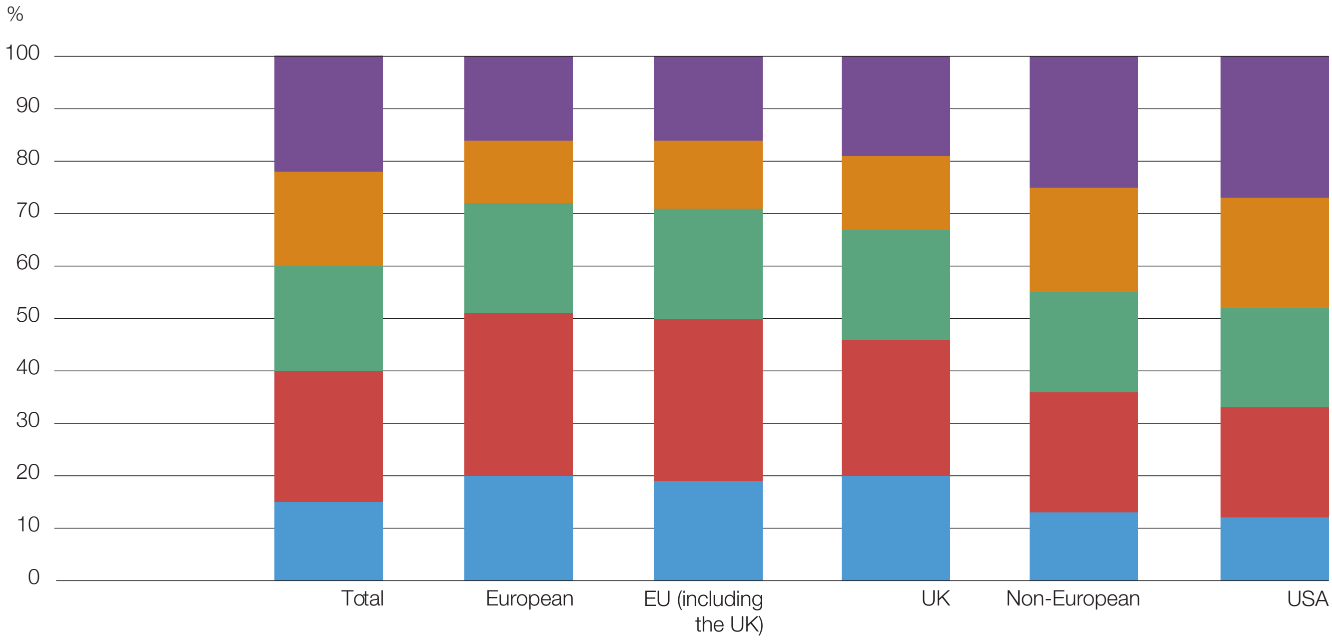


Figure 4 shows the breakdown of the age of titles by territory of origin in the selected group of UK digital video catalogues. When looking at all films there is a reasonably even split between the ages of titles, although the newest titles (0-2 years old) account for the smallest percentage of available content (15%). However, when looking at the age of titles by territory of origin, it is noticeable that European and UK films include a higher percentage of new releases (20%) compared to US titles (12%). This also means that more of the available US films are older 'library' titles – 48% are 10 years old or over, while 27% are more than 20 years old.

Figure 4 Breakdown of age of films by territory of origin in selected VoD and SVoD catalogues in the UK, 2015

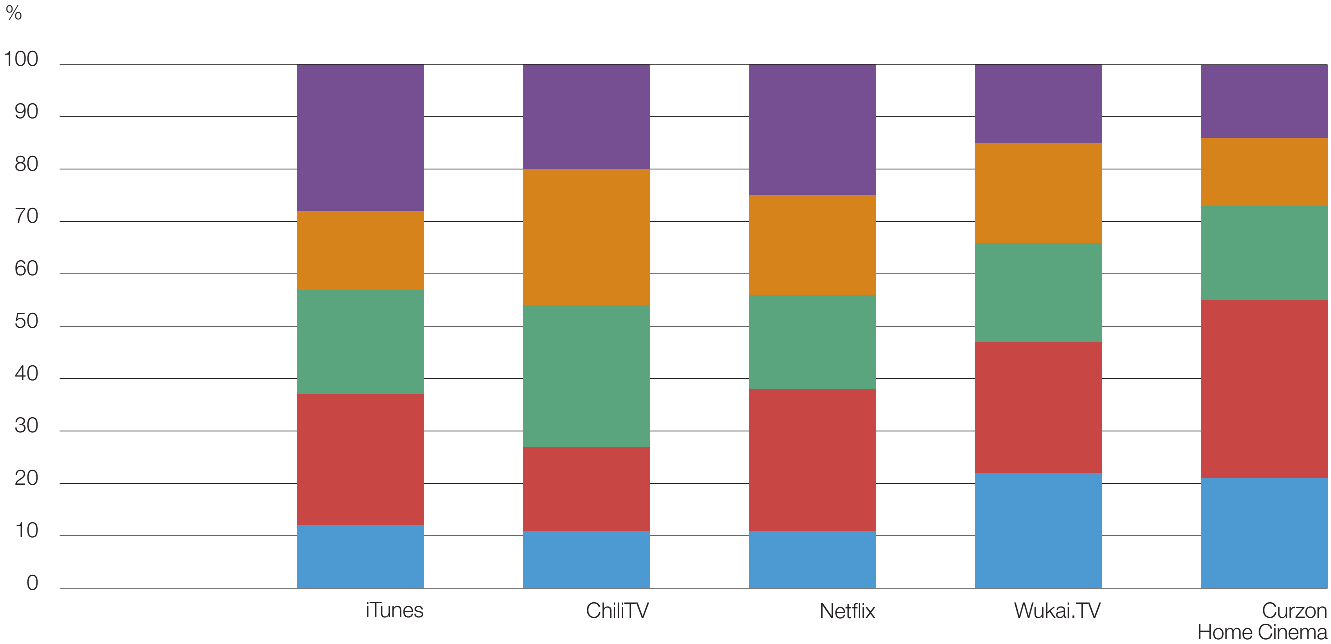


	Total	European	EU (including the UK)	UK	Non-European	USA
0-2 years	15	20	19	20	13	12
2-5 years	25	31	31	26	23	21
5-10 years	20	21	21	21	19	19
10-20 years	18	12	13	14	20	21
Over 20 years	23	17	17	19	25	27

Source: EAO

Figure 5 looks at the age of films in the individual catalogues of the five UK digital video providers. The two bigger service providers, Netflix and iTunes, have larger percentages of older films in their libraries with titles over 20 years old accounting for 25% and 28% respectively of available films. Wukai.TV and Curzon Home Cinema have higher proportions of the most recently released films in their libraries. Curzon is the only supplier analysed which has a catalogue in which a majority of titles are less than five years old.

Figure 5 Breakdown of the age of films by territory of origin in selected VoD and SVoD catalogues in the UK, 2015



	iTunes	ChiliTV	Netflix	Wukai.TV	Curzon Home Cinema
0-2 years	12	11	11	22	21
2-5 years	25	16	27	25	34
5-10 years	20	27	18	19	18
10-20 years	15	26	19	19	13
Over 20 years	28	20	25	15	15

Source: EAO

THE ONLINE AUDIENCE

In previous years we have reported the median number of films downloaded and streamed, as reported by Ofcom. This data is no longer available so in this section we look at online moving image viewing behaviour. According to Ofcom, in 2015, 67% of adult internet users (16+) watched or downloaded TV programmes or films, at least once a week, compared with 60% in 2014 and 54% in 2013.

Table 3 shows that, overall, adult internet users are more likely to go online to watch short-form audiovisual content (48%) than to watch or download television programmes or films (34%). This is reflected in all adult age groups apart from those aged 75 or over. The proportion of 16-24 year olds engaging in each of the activities is higher than for any of the other age groups.

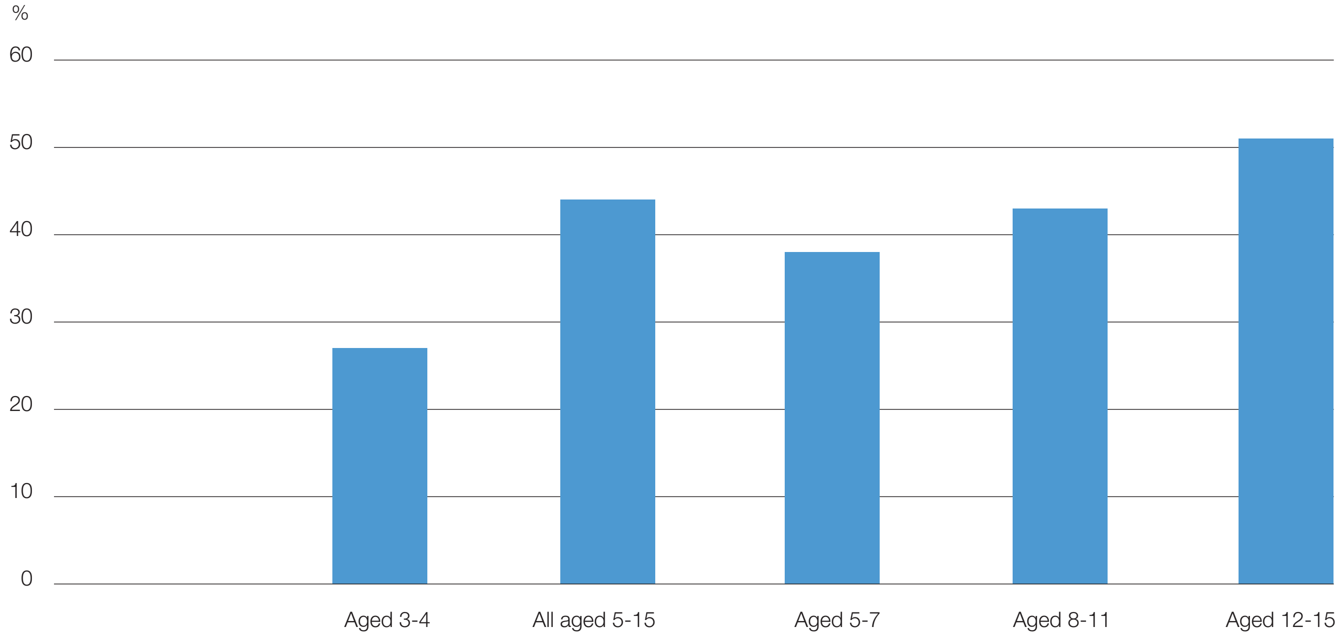
Table 3 Watching online video at least weekly, by demographic group, by adult (16+) age groups, percentage, 2015

Activity	All ages	16-24	25-34	35-44	45-54	55-64	65-74	75+
Watch online or download short video clips such as music videos or comedy clips	48	73	63	49	46	29	20	9
Watch online or download television programmes or films	34	52	44	36	30	21	18	11

Source: Adults' Media Use and Attitudes Report 2016, Ofcom
Note: Data is based on a sample of all adults (16+) who use the internet and have taken part in the listed activities on a weekly basis.

According to Ofcom, a majority of children aged 5-15 (62%) live in households with access to on-demand services, with children being more likely (44%) than not (17%) to use these services. The percentage of children that watch on-demand TV programmes and/or films from pay-per-view, subscription and catch-up services increases by age with over half (51%) of those aged 12-15 doing so, compared with 43% of those aged 8-11 and 38% of those aged 5-7 (Figure 6). A smaller proportion (54%) of the youngest age group (3-4 year olds) live in households with access to on-demand services, and just over one in four of these (27%) watch on-demand services.

Figure 6 Proportion of children (3-15) who watch on-demand television programmes and films (includes pay-per-view, subscription and catch-up services)



	Aged 3-4	All aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Percentage of children	27	44	38	43	51

Source: ‘Children and Parents: Media Use and Attitudes Report 2015’, Ofcom

CHAPTER 13

FILM ON UK TELEVISION

Image: *Quartet* courtesy of eOne Films

FILM ON UK TELEVISION

In terms of viewer numbers, television is the single most important platform for film consumption in the UK. Viewers had a choice of nearly 7,000 unique film titles across all channels in 2015, and the cumulative film audience was just under three billion.

FACTS IN FOCUS

- In 2015, 6,966 unique film titles were shown on television in the UK, including 1,463 on terrestrial channels, 1,368 on pay TV film channels and 4,135 on other digital channels.
- There were 1,665 film transmissions on terrestrial channels, down from 1,943 in 2014. Of these, 372 (22%) were UK films (down from 400 in 2014), 208 (12%) were network premieres and 39 (2%) were foreign language films.
- The most-watched film screening on terrestrial television was *Brave* on BBC One, with 6.1 million viewers; the top independent UK film screening was *Quartet* on BBC Two, with 2.7 million viewers.
- There were 2,952 million viewings of feature film across all television formats (except pay-per-view) in 2015 – over 17 times the number of cinema admissions.
- The estimated value of feature film to UK broadcasters in 2015 was £1.6 billion, up from £1.4 billion in 2014.

PROGRAMMING ON THE TERRESTRIAL CHANNELS

Table 1 shows the total number of feature films broadcast on the five terrestrial channels in 2015 and the number of UK titles broadcast in that time. (Terrestrial television is used here to describe the previous national terrestrial analogue services, all of which have some degree of public service obligation.) 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 qualifying films given other nationalities (mostly USA) in the BARB data.

There were 1,665 film transmissions on terrestrial television in 2015, down from 1,943 in 2014, an average of just under five films a day.

Table 1 Feature films broadcast[1] on terrestrial television 2015

	Number of films broadcast	Number of UK films broadcast	UK films as % of total	Number of recent UK films broadcast[2]	Recent UK films as % of total films broadcast
BBC One	227	23	10	17	7
BBC Two	454	172	38	54	12
ITV	202	71	35	16	8
Channel 4	432	59	14	41	9
Channel 5	350	47	13	8	2
Total	**1,665**	**372**	**22**	**136**	**8**

Source: Attentional, BFI RSU analysis

[1] Includes repeat broadcasts of individual titles.

[2] A recent film is one which has been theatrically released, or intended for release, in the UK since 2008.

In 2015, 12% of films broadcast on terrestrial television (208 films) were premieres (films shown for the first time on terrestrial networks); 47 of these were UK films (Table 2). Channel 4 showed the highest number of premieres overall and BBC Two showed the highest number of UK film premieres, with 111 and 19 films respectively, whereas ITV showed the smallest number of premieres with seven, although four of these were premieres of UK films. BBC One showed the lowest number of UK film premieres with two films.

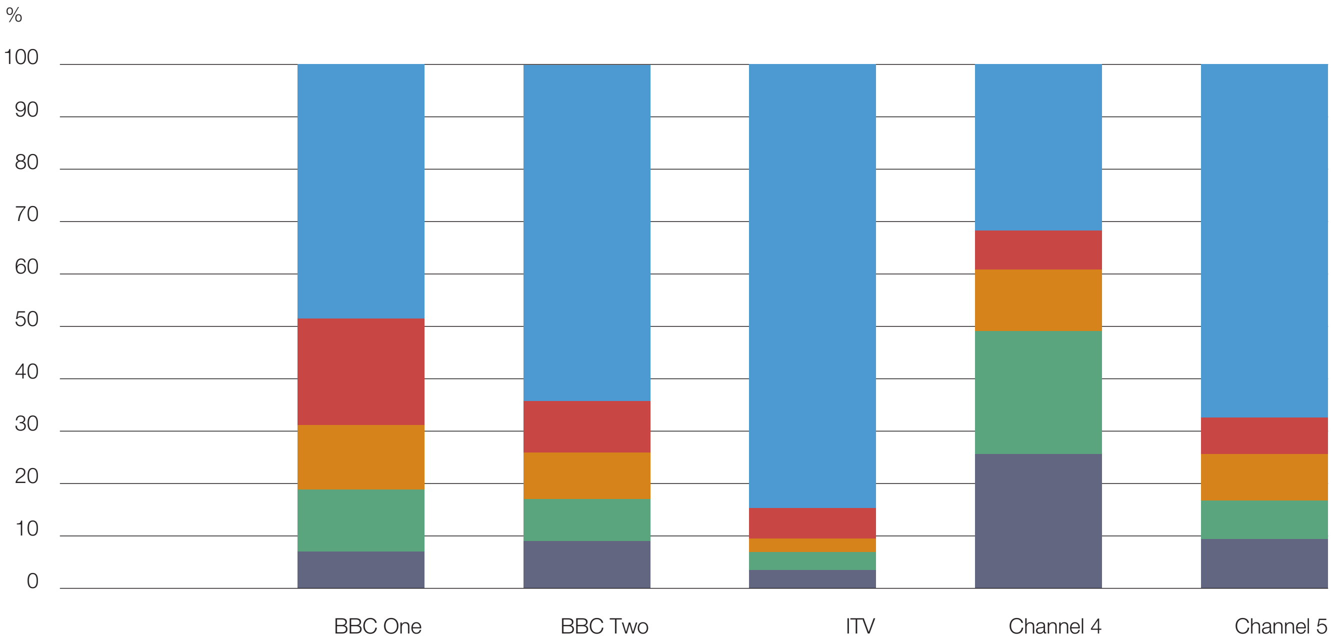
Table 2 Premiere feature films broadcast on terrestrial television, 2015

	Number of premiere films broadcast	Number of UK premiere films broadcast	UK premiere films as % of total premiere films	Average audience (million)	Top premiere	Audience for top premiere (million)
BBC One	16	2	13	1.77	Brave	6.1
BBC Two	41	19	46	0.59	Quartet	2.7
ITV	7	4	57	2.39	The Amazing Spider-Man	3.9
Channel 4	111	18	16	0.60	The Jungle Book	3.9
Channel 5	33	4	12	1.01	Olympus Has Fallen	1.8
Total	**208**	**47**	**23**	**0.81**		

Source: Attentional, BARB, BFI RSU analysis

Figure 1 shows the percentage of films broadcast categorised by the number of times they have been screened by a particular channel. The number of times films are shown varies across the channels, although for each channel titles shown five times or more account for the greatest share (57%) of film broadcasts. Channel 4 had the largest proportion of premieres (26%) in 2015 in terms of films broadcast, while ITV had the smallest (4%).

Figure 1 Percentage of feature film premieres and repeat broadcasts on terrestrial channels, 2015



	BBC One	BBC Two	ITV	Channel 4	Channel 5
Premiere	7.0	9.0	3.5	25.7	9.4
2nd broadcast	11.9	8.1	3.5	23.4	7.4
3rd broadcast	12.3	8.8	2.5	11.8	8.9
4th broadcast	20.3	9.9	5.9	7.4	6.9
5th or more broadcast	48.5	64.1	84.7	31.7	67.4

Source: Attentional, BARB, BFI RSU analysis

The most popular film premiere on terrestrial television in 2015 was the Christmas Eve broadcast of *Brave* on BBC One, which attracted 6.1 million viewers. The channel also had two other top 10 premieres including the year's second highest-rated terrestrial television debut, *Mrs. Brown's Boys D'Movie*, which drew 4.7 million viewers. Interestingly, one of the films in the list, Disney's classic animation *The Jungle Book*, made its premiere on terrestrial television almost 50 years after its theatrical release. The top 10 is dominated by films from the USA, which include two UK studio-backed titles. *Quartet* is the only UK independent production in the list (Table 3).

Table 3 Top 10 film premieres on terrestrial television, 2015

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Brave	BBC One	USA	2012	6.1
2	Mrs. Brown's Boys D'Movie	BBC One	UK/Ire/USA	2014	4.7
3	The Amazing Spider-Man	ITV	USA	2012	3.9
4	The Jungle Book	Channel 4	USA	1968	3.9
5	The Croods	BBC One	USA	2013	3.9
6	The Hobbit: An Unexpected Journey	ITV	USA/NZ	2012	3.8
7	The Dark Knight	ITV	UK/USA	2008	3.6
8	The Adventures of Tintin	ITV	USA/NZ	2011	3.4
9	Ted	ITV	USA	2012	2.8
10	Quartet	BBC Two	UK	2013	2.7

Source: Attentional, BARB, BFI RSU analysis

As Table 4 shows, 39 foreign language films were broadcast on the main terrestrial channels in 2015 (2% of all film transmissions) down from 56 in 2014. Only two terrestrial channels screened foreign language titles during the year: the majority were shown on Channel 4 (31 films) while BBC Two screened eight.

Table 4 Foreign language films broadcast on terrestrial television, 2015

	Number of foreign language films broadcast	% of channel's film output	Average audience (million)	Top foreign language film	Audience for top rated foreign language film[1] (million)
BBC One	-	-	-	-	-
BBC Two	8	1.8	0.08	La Vie en Rose	0.18
ITV	-	-	-	-	-
Channel 4	31	7.2	0.05	[Rec][2]	0.13
Channel 5	-	-	-	-	-
Total	**39**	**2.3**	**0.06**		

Source: Attentional, BARB, BFI RSU analysis
[1] Total audience for all transmissions for the foreign language film, on the terrestrial channel listed.

Audience figures for foreign language films on terrestrial television in the last few years have failed to match the success of sub-titled European television series. As Table 5 shows, with over 179,000 viewers, the most popular foreign language film shown on the main terrestrial channels in 2015 was the Edith Piaf biopic *La Vie en Rose*, followed by the Spanish horror film *[Rec]*[2] with an audience of just over 129,000. (The top two foreign language films on terrestrial television in 2014, *The Gatekeepers* and *House of FIying Daggers,* achieved audiences of just over 361,000 and 263,000 respectively.) Eight of the top 10 films were European-backed projects and the remaining two were from India.

Table 5 Top 10 foreign language films[1] on terrestrial television, 2015

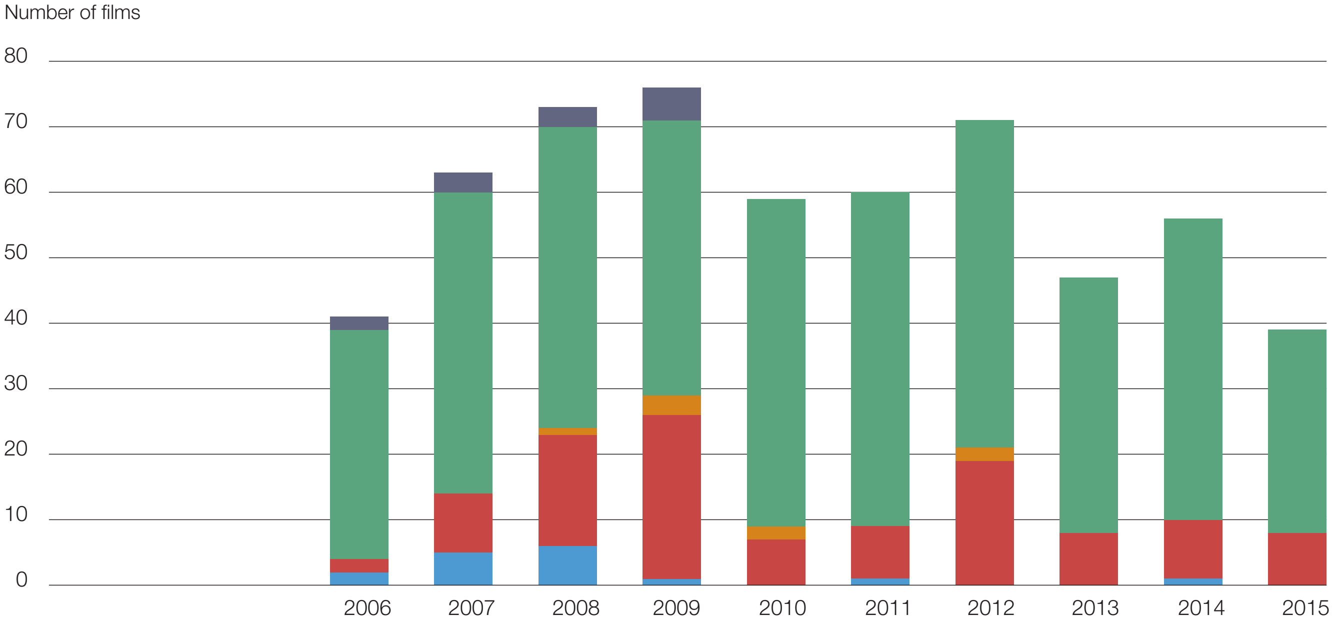
	Title	Channel	Country of origin	Year of theatrical release	Audience
1	La Vie en Rose	BBC Two	Fra/UK/Czech	2007	179,300
2	[Rec][2]	Channel 4	Spain	2010	129,200
3	Lore	Channel 4	Ger/Australia/UK	2013	108,200
4	Stranger by the Lake	Channel 4	France	2014	100,300
5	Love Like Poison	BBC Two	France	2011	94,700
6	The Father of My Children	BBC Two	Fra/Ger/Bel	2010	85,500
7	Cash	BBC Two	France	2008	80,400
8	Fashion	Channel 4	India	2008	71,700
9	Chennai Express	Channel 4	India	2013	69,500
10	Come as You Are	BBC Two	Belgium	2013	66,900

Source: Attentional, BFI RSU analysis

[1] Foreign language films with the highest audience figure for an individual transmission.

Figure 2 illustrates the number of foreign language films broadcast on terrestrial television between 2006 and 2015. The total number of titles shown annually has remained consistently low in comparison to the number of English language titles broadcast, ranging in the 10-year period from a high of 76 in 2009 to the 39 transmissions achieved in 2015. Channel 4 has shown the most foreign language films throughout the period accounting for three quarters (75%) of all non-English language film broadcasts on terrestrial channels.

Figure 2 Number of foreign language films broadcast on terrestrial television, 2006-2015



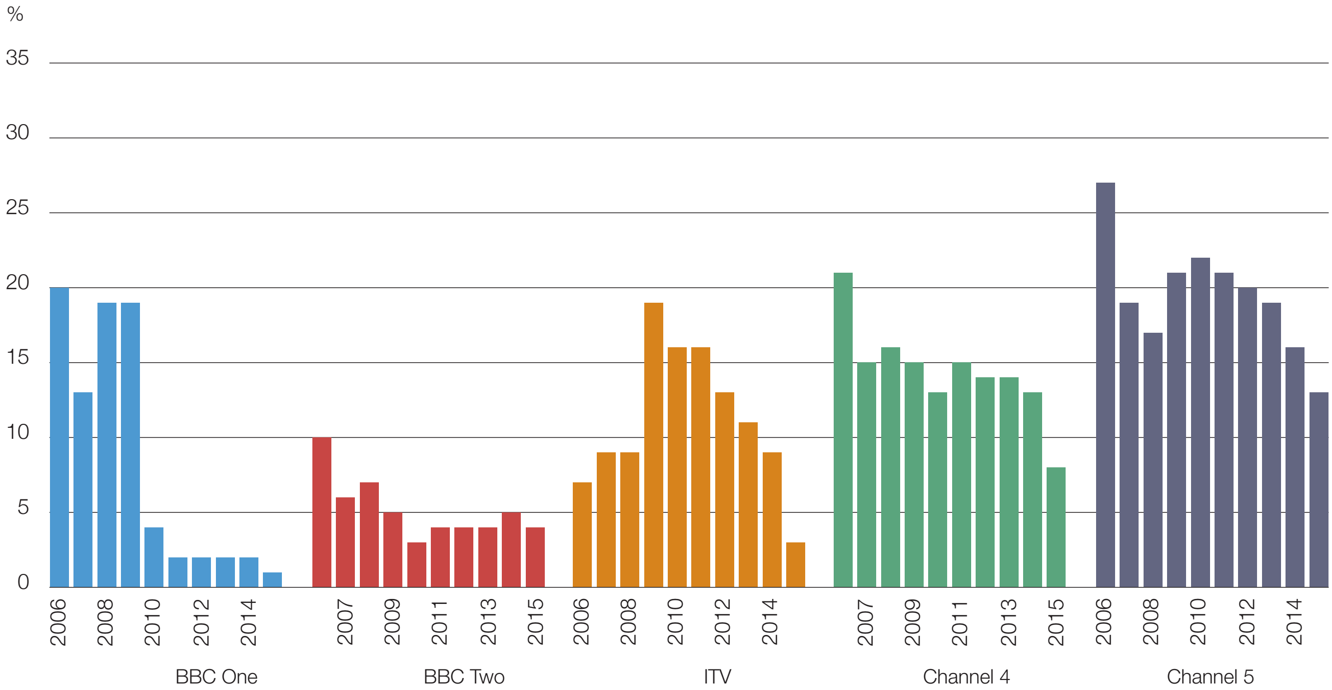
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
BBC One	2	5	6	1	-	1	-	-	1	-
BBC Two	2	9	17	25	7	8	19	8	9	8
ITV	-	-	1	3	2	-	2	-	-	-
Channel 4	35	46	46	42	50	51	50	39	46	31
Channel 5	2	3	3	5	-	-	-	-	-	-
Total	**41**	**63**	**73**	**76**	**59**	**60**	**71**	**47**	**56**	**39**

Source: Attentional, BFI RSU analysis

FILMS ON PEAK TIME TERRESTRIAL TELEVISION, 2006-2015

The proportion of peak time hours (18:00 to 23:00 hours) dedicated to feature film varied widely across the terrestrial channels between 2006 and 2015 (Figure 3). Throughout the period, Channel 5 has generally had the highest proportion of peak time hours dedicated to film (13% in 2015), while Channel 4 has usually had either the second or third highest share. Film made up 8% of peak time programming for Channel 4 in 2015 and 4% for BBC Two. For the fourth consecutive year, BBC One had the lowest proportion of peak time hours dedicated to film (1%). In 2015, all of the channels saw a drop in the share of peak time hours they dedicated to film compared with the previous year.

Figure 3 Film as a percentage of peak time programming hours by channel, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
BBC One	20	13	19	19	4	2	2	2	2	1
BBC Two	10	6	7	5	3	4	4	4	5	4
ITV	7	9	9	19	16	16	13	11	9	3
Channel 4	21	15	16	15	13	15	14	14	13	8
Channel 5	27	19	17	21	22	21	20	19	16	13

Source: Attentional

TOP FILMS ON TERRESTRIAL TELEVISION

Seven of the top 10 films broadcast on terrestrial television in 2015 were premieres (Table 6). *Brave* tops the list with 6.1 million viewers. (In theatrical revenue terms, this is equivalent to a box office gross of £43.5 million; its actual gross in the UK was £22.2 million). *Marvel Avengers Assemble* appears in the top 10 list for a second consecutive year.

Table 6 Top 10 films[1] on terrestrial television, 2015

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Brave	BBC One	USA	2012	6.1
2	Mrs. Brown's Boys D'Movie	BBC One	UK/Ire/USA	2014	4.7
3	The Amazing Spider-Man	ITV	USA	2012	3.9
4	The Jungle Book	Channel 4	USA	1968	3.9
5	The Croods	BBC One	USA	2013	3.9
6	The Hobbit: An Unexpected Journey	ITV	USA/NZ	2012	3.8
7	The Dark Knight	ITV	UK/USA	2008	3.6
8	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.6
9	Marvel Avengers Assemble	BBC One	USA	2012	3.6
10	Indiana Jones and The Kingdom of the Crystal Skull	BBC One	USA	2008	3.5

Source: Attentional, BARB

[1] Films with the highest audience figure for an individual transmission.

The list of the top 10 UK films of 2015 includes three premiere titles, two of which appear in the year's overall top 10 films on terrestrial television (Table 7). The list is headed by *Mrs. Brown's Boys D'Movie* which attracted the year's highest audience for a single broadcast of a UK film across the terrestrial channels. As in the previous two years, the Harry Potter franchise features strongly in the list, with five of the films making an appearance. Eight of the top 10 UK film broadcasts were on ITV and there was one each on BBC One and BBC Two.

Table 7 Top 10 UK qualifying films[1] on terrestrial television, 2015

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Mrs. Brown's Boys D'Movie	BBC One	UK/Ire/USA	2014	4.7
2	The Dark Knight	ITV	UK/USA	2008	3.6
3	Harry Potter and The Deathly Hallows: Part 1	ITV	UK/USA	2010	3.6
4	Skyfall	ITV	UK/USA	2012	3.2
5	Harry Potter and The Deathly Hallows: Part 2	ITV	UK/USA	2011	3.2
6	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	3.0
7	Harry Potter and the Half Blood Prince	ITV	UK/USA	2009	2.9
8	Quartet	BBC Two	UK	2013	2.7
9	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	2.7
10	Nanny McPhee and the Big Bang	ITV	UK/USA	2010	2.6

Source: Attentional, BARB

[1] Films with the highest audience figure for an individual transmission.

The most popular screenings of UK independent films on terrestrial television in 2015 were the network premieres of *Quartet* (2.7 million viewers) and *Red 2* (2.4 million viewers) which were shown on BBC Two and Channel 4 respectively (Table 8). In total, seven of the top 10 titles were premieres, including the 2014 releases *The Inbetweeners 2*, *Non-Stop* and *Cuban Fury*. The three previously shown titles have all appeared in this top 10 list in earlier editions of the Yearbook.

Table 8 Top 10 independent UK films[1] on terrestrial television, 2015

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Quartet	BBC Two	UK	2013	2.7
2	Red 2	Channel 4	UK/USA#	2013	2.4
3	The Inbetweeners 2	Channel 4	UK	2014	2.2
4	The Sweeney	Channel 4	UK	2012	2.2
5	Nativity 2: Danger in the Manger!	BBC Two	UK	2012	2.0
6	Non-Stop	Channel 4	UK/Ger/USA#	2014	2.0
7	The Queen	ITV	UK/Fra/Ita	2006	2.0
8	The Best Exotic Marigold Hotel	Channel 4	UK/USA/Ind#	2012	1.7
9	Dad's Army	BBC Two	UK	1971	1.7
10	Cuban Fury	Channel 4	UK	2014	1.7

Source: Attentional, BARB

Notes:

[1] Films with the highest audience figure for an individual transmission.

Film made with independent (non-studio) US support.

FILMS ON MULTI-CHANNEL TELEVISION

In 2015, multi-channel television (freeview/satellite/cable) accounted for almost 48% of all television viewing in the UK and 66% of all viewings of film on television. (For the purposes of this section, multi-channel television includes all free-to-air and paid [non-film subscription] channels with the exclusion of the traditional terrestrial channels.) Table 9 lists the number of film transmissions, the average audience, the top film and audience for the top film, for a selection of channels which broadcast feature films. After dedicated film channels TCM (with over 2,900 films), Film4 (just under 2,800 films) and Talking Pictures TV (2,000 films), the highest number of titles was screened by the ITV 2-4 suite of channels with over 1,600 films.

For many of the channels, including TCM, the UKTV channels (Dave, Drama, Gold, W), BBC Three and BBC Four, the number of transmissions decreased compared with 2015. *Skyfall* recorded the largest audience for a single screening on multi-channel television in the year, with over 2.2 million viewers on ITV2.

Table 9 Feature films on multi-channel television, 2015

Channel	Number of films broadcast	Average audience (000)	Top film	Audience for top film (000)
TCM	2,916	21	The Dark Knight	154
Film4	2,783	176	The Best Exotic Marigold Hotel	1,294
Talking Pictures TV	2,000	2	Gaolbreak	39
ITV 2-4	1,614	249	Skyfall	2,210
Star Gold, Star plus and Life OK	1,303	4	Kabhi Khushi Kabhie Gham…	54
SAB	961	4	Dum Laga Ke Haisha	70
London Live	816	11	The Fall of the Essex Boys	87
4 Music, 4Seven, E4 and More 4	685	179	Wake of the Red Witch	32
UMP Movies	683	4	Oh My God	56
5 Star	615	114	633 Squadron	326
Venus TV	491	1	Aas Paas	21
5 USA	435	102	Olympus Has Fallen	438
Syfy	430	48	Star Trek IV: The Voyage Home	189
Movies 24	416	5	All I Want for Christmas	63
Showbiz TV	311	0.3	The Magic Sword	9
Horror Channel	266	38	5ive Girls	147
Rishtey	195	7	Gabbar is Back	111
Dave, Drama, Gold, W[2]	190	87	Star Trek: Generations	283
BBC Three[3] and BBC Four	182	413	Indiana Jones and the Last Crusade	1,157
Spike	166	62	The Expendables 2	249
Sky 1, Sky Arts 1-2, Sky Atlantic, Sky Living	157	88	S.W.A.T.	422
True Drama, True Entertainment, True Movies 1-2	123	8	Mockingbird Don't Sing	120

Source: Attentional, BARB

Notes:

[1] Film with the highest audience figure for an individual transmission.

[2] Dave, Drama, Gold and W are part of the stable of UKTV channels.

[3] BBC Three stopped broadcasting on 16 February 2016 and was replaced with an online-only service.

The TBN UK channels are not shown in the table due to issues relating to identifiable film titles.

Despicable Me was the top film on multi-channel television for the second consecutive year in terms of total audience, with 8.4 million viewers from eight broadcasts (Table 10). As in previous years, ITV2 had the largest number of films in the top 10, three of which were James Bond titles, the same as in 2014.

Table 10 Top 10 feature films on multi-channel television, 2015

	Title	Channel	Number of broadcasts	Country of origin	Year of theatrical release	Total audience[1] (million)
1	Despicable Me	ITV2	8	USA	2010	8.4
2	Skyfall	ITV2	5	UK/USA	2012	7.2
3	Casino Royale	ITV2/ITV4	8	UK/USA	2005	6.2
4	Hotel Transylvania	CITV/ITV2	8	USA	2012	4.5
5	The Polar Express	ITV2	6	USA	2004	4.4
6	Iron Man	Film4/E4	9	USA	2008	4.4
7	The Lost World: Jurassic Park	ITV2	7	USA	1997	4.2
8	Back to the Future Part II	ITV2	6	USA	1989	4.2
9	Ice Age 3: Dawn of the Dinosaurs	Film4/E4	10	USA	2009	4.0
10	Quantum of Solace	ITV2	4	UK/USA	2008	3.9

Source: Attentional, BARB

[1] Total audience figure for all transmissions across all free-to-air and paid (non-film subscription) multi-channels.

Table 11 shows the top 10 films, in terms of combined viewings, on the additional subscription TV film channels operated by Sky in 2015. The various Sky Movies (rebranded as Sky Cinema in July 2016) channels broadcast a total of 1,368 unique titles across 44,717 slots during the year with an average audience of over 12,500. This is up on 2014 when 1,122 unique titles were shown across 33,009 slots with an average audience of nearly 10,000.

Disney and Pixar titles dominate the top 10 with six films in the list, including the four most watched titles. *Frozen* attracted the largest cumulative audience with 16.3 million viewers over 141 transmissions, which is more than twice the audience of the top film on pay TV channels in 2014 (*Wreck-It Ralph*; 6.5 million viewers from 148 transmissions). *Tangled* is second in the list, with 7.3 million viewers from 133 transmissions, followed by *Maleficent* (6.3 million from 167 transmissions). The large audiences for nearly all of the top 10 films is due in part to their being shown at least twice a week over the course of the year. However, another Disney film, which does not feature in the list, claimed the largest audience for a single transmission on pay TV in 2015: Kenneth Branagh's *Cinderella* attracted just over one million viewers when it premiered in the run up to Christmas.

Table 11 Top 10 feature films[1] on pay TV film channels, 2015

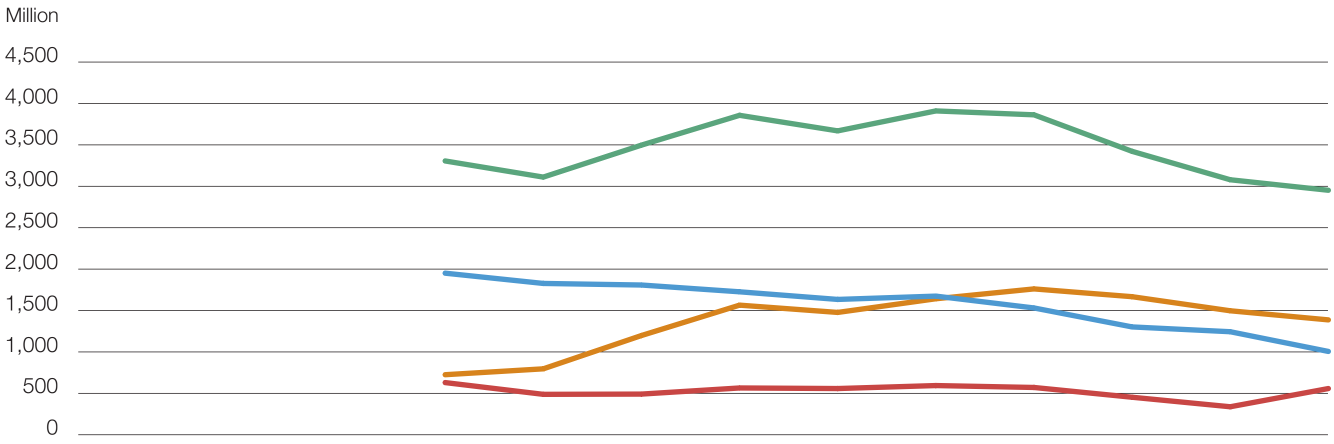
	Title	Number of transmissions	Country of origin	Year of theatrical release	Total audience[1] (million)
1	Frozen	141	USA	2013	16.3
2	Tangled	133	USA	2010	7.3
3	Maleficent	167	USA	2014	6.3
4	Beauty and the Beast	104	USA	1992	5.6
5	Guardians of the Galaxy	154	UK/USA	2014	5.6
6	The Lego Movie	108	Aus/USA/Den	2014	5.0
7	Rio 2	106	USA	2014	4.4
8	Finding Nemo	109	USA	2003	4.3
9	Despicable Me 2	45	USA	2013	4.0
10	Sleeping Beauty	124	USA	1959	3.9

Source: Attentional, BARB
Notes:
[1] Total audience figure for all transmissions across all subscription film channels.
All films were shown on Sky Movies.

THE AUDIENCE FOR FILM ON ALL TELEVISION CHANNELS, 2006-2015

In 2015, there were just under three billion viewings of film on television in the UK (Figure 4), compared with cinema admissions of 171.9 million. This is the lowest figure for television film audiences in the 10-year period 2006-2015; it represents approximately 47 film viewings per person per year. Audience numbers decreased for terrestrial and multi-channel television platforms, but increased for pay TV platforms. Multi-channel film viewings were the lowest since 2008; however, they were greater than those on terrestrial channels for the fourth year in a row. Pay TV channels dedicated to film had the smallest overall audience with 558 million viewers.

Figure 4 Total audience for feature film on television (except pay-per-view), 2006-2015



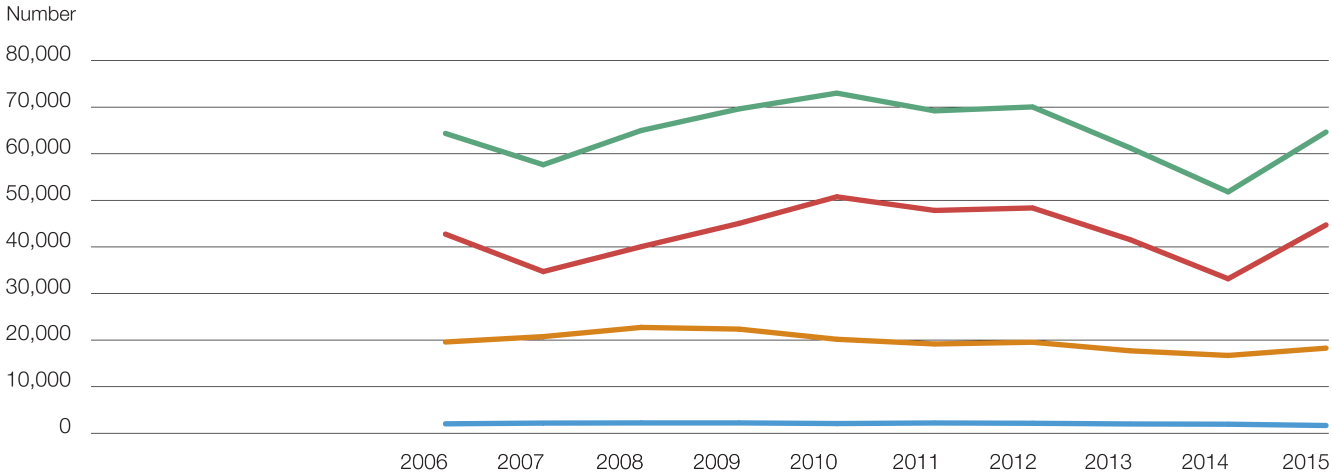
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Terrestrial	1,951	1,827	1,808	1,726	1,634	1,674	1,531	1,302	1,244	1,006
Pay TV film channels	630	488	491	565	558	594	571	453	338	558
Other multi-channel	725	796	1,198	1,565	1,477	1,642	1,761	1,667	1,497	1,387
Total	**3,306**	**3,111**	**3,497**	**3,857**	**3,669**	**3,910**	**3,863**	**3,422**	**3,079**	**2,952**

Source: BFI RSU, Attentional, BARB
Note: Figures for 2006-2013 have been revised since publication of the 2015 Statistical Yearbook.

Figure 5 shows the total number of film transmissions on television since 2006. The total number of screenings increased from 51,807 transmissions in 2014 to 64,650 in 2015, the first rise in the overall number of screenings since 2012.

In terms of unique film titles, there were 1,463 films broadcast on terrestrial, 1,368 titles on pay TV film channels and 4,135 on other multi-channels. Overall, 6,966 individual film titles were shown across all television channels in 2015.

Figure 5 Total number of film transmissions on all television channels (except pay-per-view), 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Terrestrial	2,027	2,182	2,221	2,221	2,085	2,210	2,142	1,994	1,943	1,665
Pay TV film channels	42,745	34,710	40,048	45,039	50,754	47,830	48,365	41,543	33,163	44,717
Other multi-channel	19,589	20,749	22,719	22,359	20,173	19,166	19,541	17,698	16,701	18,268
Total	**64,361**	**57,641**	**64,988**	**69,619**	**73,012**	**69,206**	**70,048**	**61,235**	**51,807**	**64,650**

Source: BFI RSU, Attentional, BARB

Note: Figures for 2006-2013 have been revised since this data was last published in the 2014 Statistical Yearbook.

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 have been approximately £1.6 billion in 2015 an increase of approximately £260 million on 2014. 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.

CHAPTER 14

THE UK FILM MARKET AS A WHOLE

Image: *Mr Holmes* courtesy of eOne Films

THE UK FILM MARKET AS A WHOLE

The UK is the third largest film market in the world, generating revenues in excess of £4.1 billion. In 2015, cinema-going remained the most significant component of the film value chain, with revenues of over £1.2 billion.

FACTS IN FOCUS

- The total filmed entertainment market in the UK in 2015 was worth an estimated £4.1 billion, up from £3.8 billion in 2014.
- Revenues across theatrical, digital video and pay TV were up compared with 2014, with pay TV increasing by 71%.
- Gross revenues for UK film were an estimated £1,095 million, up from £836 million in 2014.
- Overall film revenues in the UK increased every year between 2006 and 2015, with the exception of 2014.
- In 2015, the UK had the third largest filmed entertainment market in the world after the USA and China, but is expected to be overtaken by Japan in the next four years.

THE UK FILMED ENTERTAINMENT MARKET AS A WHOLE

In 2015, theatrical revenues were the most significant component of the film value chain in the UK. As Table 1 shows, the box office accounted for 30% of the total market value (£1,236 million) in 2015, compared with 28% (£1,058 million) in 2014. Revenues from theatrical, digital video and pay TV were up on 2014, while those from physical video rental and retail, terrestrial and multi-channel TV were down. Pay TV revenues recorded the largest increase, with a rise in value from £466 million to £795 million and an increase in overall market share from 12% to 19%. (It should be noted that the majority of all television revenues accrue to the television industry rather than to the suppliers of film.)

Gross revenues for UK films in 2015 were estimated to be £1,095 million, with the share for British films highest in the theatrical market (45%), followed by terrestrial TV (27%) and physical video rental and retail (both with 25%).

Table 1 UK filmed entertainment market, 2014 and 2015

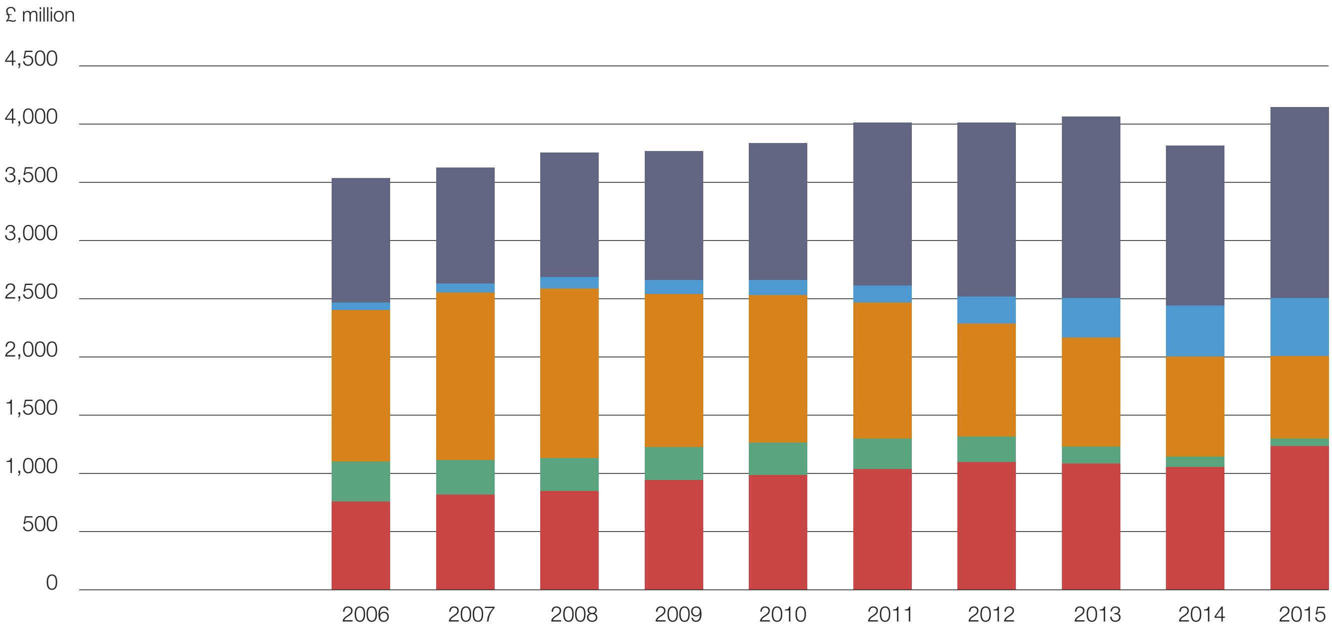
	2014			2015		
	Total gross value (£ million)	Attributable to UK films (£ million)	UK film as % of total gross	Total gross value (£ million)	Attributable to UK films (£ million)	UK film as % of total gross
Theatrical	1,058	289	27	1,236	580	45
Physical video rental	87	22	25	62	16	25
Physical video retail	861	217	25	712	178	25
Digital video	435	88	20	499	88	17
Pay TV	466	51	11	795	63	8
Terrestrial TV	235	62	26	225	61	27
Other multi-channel	673	107	16	616	109	18
Total	**3,815**	**836**	**22**	**4,145**	**1,095**	**26**

Source: comScore, BASE, Official Charts Company, Attentional, ONS, IHS, BFI RSU analysis
Notes:
'Theatrical' is the total gross UK theatrical revenues (including VAT) in the calendar years 2014 and 2015 for all films exhibited in the UK. See Box Office report.
'Physical video rental' is the estimated revenue from physical video rental (DVD, Blu-ray, etc) from the number of transactions in the calendar years 2014 and 2015. 2014 figures have been revised since the 2015 Yearbook.
'Physical video retail' is the total revenue from physical video retail transactions in the calendar years 2014 and 2015. See Film on physical video report.
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 multi-channel TV. See Film on UK television report.
Digital video revenues are derived from IHS estimates of the combined size of the television and online on-demand 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 TV 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 UK film economy report for UK film export revenues.
Figures may not sum to totals due to rounding.

THE EVOLUTION OF UK FILM REVENUES, 2006-2015

Aggregate film revenues increased every year between 2006 and 2015, with the exception of 2014. Up to 2013, there was steady growth with increased theatrical, television and digital video revenues compensating for a decline in the value of the physical video rental and retail markets. Overall revenues increased again in 2015, rising to £4.1 billion from £3.8 billion in 2014, an increase of just under 9%.

Figure 1 Gross film revenues, all platforms, 2006-2015

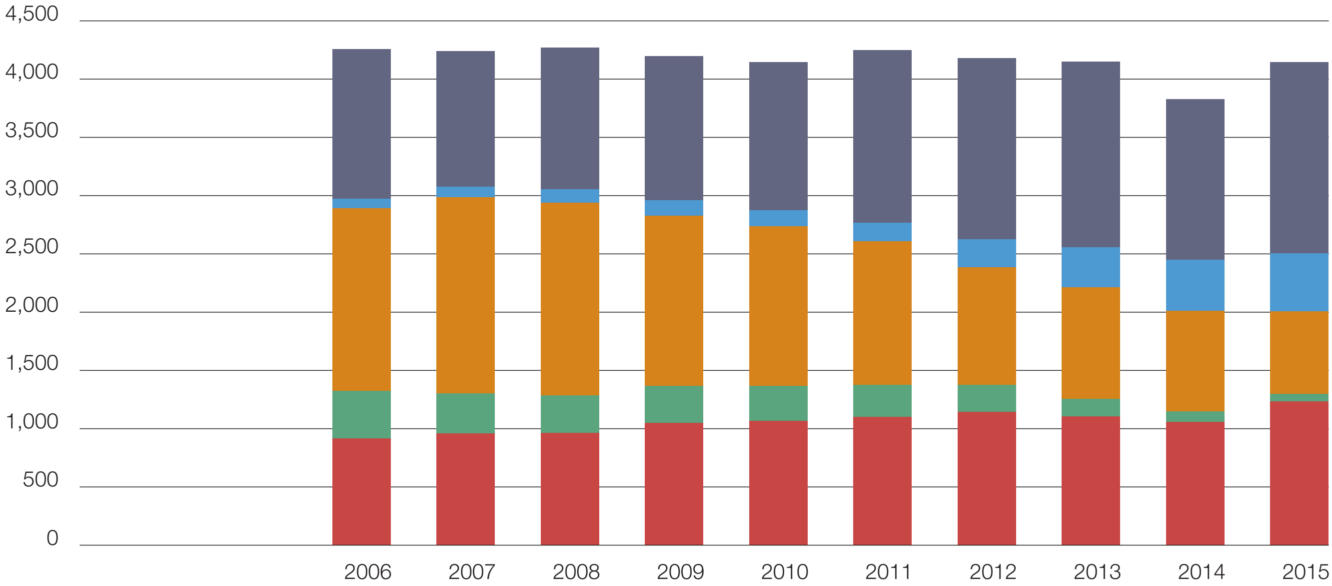


	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Theatrical	762	821	850	944	988	1,040	1,099	1,083	1,058	1,236
Physical video rental	340	295	284	285	278	262	221	146	87	62
Physical video retail	1,302	1,440	1,454	1,311	1,267	1,165	968	940	861	712
Digital video	67	75	101	119	130	149	234	338	436	499
Film on television	1,066	994	1,067	1,108	1,173	1,398	1,491	1,557	1,374	1,637
Total	**3,537**	**3,625**	**3,756**	**3,767**	**3,836**	**4,014**	**4,014**	**4,063**	**3,816**	**4,146**

Source: comScore, BASE, Official Charts Company, Attentional, ONS, IHS, BFI RSU analysis
Notes:
'Film on television' covers terrestrial, pay TV and other multi-channel. On-demand television-based services are included within the digital video total.
2014 figure for physical video rental revised since the 2015 Yearbook.
2012-2014 figures for digital video revised since the 2015 Yearbook.
Figures may not sum to totals due to rounding.

The revenues shown in Figure 1 are the actual figures; if adjusted for inflation (Figure 2), the figures show that, again with the exception of 2014, revenues have plateaued over the period.

Figure 2 Gross inflation-adjusted film revenues, all platforms, 2006-2015 (expressed in 2015 pounds)



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Theatrical	917	960	966	1,052	1,068	1,101	1,145	1,106	1,061	1,236
Physical video rental	410	345	322	317	300	277	231	149	87	62
Physical video retail	1,566	1,684	1,653	1,461	1,369	1,233	1,008	960	863	712
Digital video	81	88	115	133	140	158	244	345	438	499
Film on television	1,282	1,163	1,213	1,234	1,267	1,480	1,553	1,590	1,377	1,637
Total	**4,255**	**4,240**	**4,269**	**4,197**	**4,145**	**4,249**	**4,180**	**4,149**	**3,826**	**4,146**

Source: comScore, BASE, Official Charts Company, Attentional, ONS, IHS, BFI RSU analysis
Notes:
Actual revenues deflated by the UK GDP deflator, which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2016.
'Film on television' covers terrestrial, pay TV and other multi-channel TV. On-demand television-based services are included in the digital video total.
Figures may not sum to totals due to rounding.

THE UK FILM MARKET IN THE GLOBAL CONTEXT

According to the PricewaterhouseCoopers' *Global Entertainment and Media Outlook 2016-2020*, in 2015 the UK had the third largest filmed entertainment market in the world after the USA and China. The USA accounted for 37% of the world market, with China accounting for 8.7% and the UK for 7.0%. The next largest countries in terms of market share were Japan (6.9%), Germany (4.1%) and France (3.6%).

Table 2 Filmed entertainment revenues by country/region, 2015

Country/region	US$ million	%
USA	31,529	37.0
China	7,434	8.7
UK	5,936	7.0
Japan	5,887	6.9
Other Western Europe	3,983	4.7
Germany	3,532	4.1
France	3,086	3.6
Canada	2,884	3.4
Australia	2,255	2.6
India	2,020	2.4
South Korea	1,790	2.1
Other Asia Pacific	1,631	1.9
Other Central and Eastern Europe	1,600	1.9
Brazil	1,549	1.8
Italy	1,419	1.7
Mexico	1,387	1.6
Other Latin America	1,249	1.5
Taiwan	1,210	1.4
Middle East and Africa	1,137	1.3
Russia	1,031	1.2
Spain	853	1.0
Malaysia	701	0.8
Netherlands	646	0.8
Hong Kong	524	0.6
Total	**85,273**	**100.0**

Source: PwC, *Global Entertainment and Media Outlook 2016-2020,* www.pwc.com/outlook
Notes:
Information contained in this table was taken from the Cinema segment and the Home Video section of the TV and Video segment of the PwC *Global Entertainment and Media Outlook, 2016-2020,* www.pwc.com/outlook, however, some calculations and categorisation of regions are our own. The breakdown of sectors by segments in the current *Global Entertainment and Media Outlook* differ from those used in previous years; filmed entertainment revenues are now calculated differently.
'Cinema' comprises both box office and advertising.
'Home video' includes both electronic and physical home video of films, TV programming and other premium video content. Revenue comprises sell-through and rental of physical home video, and subscription and transactional revenues from electronic home video; it is from consumer spending.
Other Western Europe comprises Austria, Belgium, Denmark, Finland, Greece, Republic of Ireland, Norway, Portugal, Sweden and Switzerland.
Other Asia Pacific comprises Indonesia, New Zealand, Pakistan, Philippines, Singapore, Thailand and Vietnam.
Other Central and Eastern Europe comprises Czech Republic, Hungary, Israel, Poland, Romania and Turkey.
Middle East and Africa comprises Algeria, Bahrain, Egypt, Jordan, Kenya, Kuwait, Lebanon, Morocco, Nigeria, Oman, Qatar, Saudi Arabia, South Africa and the United Arab Emirates.
Other Latin America comprises Argentina, Chile, Colombia, Peru and Venezuela.

According to PricewaterhouseCoopers forecasts, the USA and China will remain the world's top two markets for filmed entertainment over the next four years (although the USA will lose significant share to China), but Japan will overtake the UK to become the third largest market (Table 3). India is expected to rise significantly in the rankings in terms of market share, moving from 10th place to sixth. Four other top 10 territories will drop in the rankings; France and Germany will fall by two places, while Canada and Australia will fall by one place.

Table 3 Filmed entertainment revenues by country/region, forecast for 2020

Country/region	US$ million	%
USA	33,778	32.4
China	18,532	17.8
Japan	6,232	6.0
UK	5,674	5.4
Other Western Europe	4,231	4.1
India	3,489	3.3
Canada	3,326	3.2
Germany	3,232	3.1
France	3,137	3.0
Australia	2,606	2.5
Other Asia Pacific	1,987	1.9
Other Central and Eastern Europe	1,977	1.9
South Korea	1,974	1.9
Other Latin America	1,947	1.9
Brazil	1,944	1.9
Mexico	1,622	1.6
Italy	1,565	1.5
Middle East and Africa	1,433	1.4
Russia	1,386	1.3
Taiwan	1,177	1.1
Spain	1,046	1.0
Netherlands	774	0.7
Malaysia	714	0.7
Hong Kong	536	0.5
Total	**104,319**	**100.0**

Source: PwC, *Global Entertainment and Media Outlook 2016-2020,* www.pwc.com/outlook
Notes:
Information contained in this table was taken from the Cinema segment and the Home Video section of the TV and Video segment of the PwC *Global Entertainment and Media Outlook, 2016-2020,* www.pwc.com/outlook, however, some calculations and categorisation of regions are our own.
Percentages may not sum to 100 due to rounding.
See notes to Table 2.

CHAPTER 15

AUDIENCES

Credit: *The Second Best Exotic Marigold Hotel* courtesy of Twentieth Century Fox.

AUDIENCES

The audience lies at the heart of a vibrant and successful film economy and culture, yet current insight still provides a limited perspective on audience engagement. While data on cinema-going audiences is robust, new research is needed to show the full picture of the audience on all platforms.

FACTS IN FOCUS

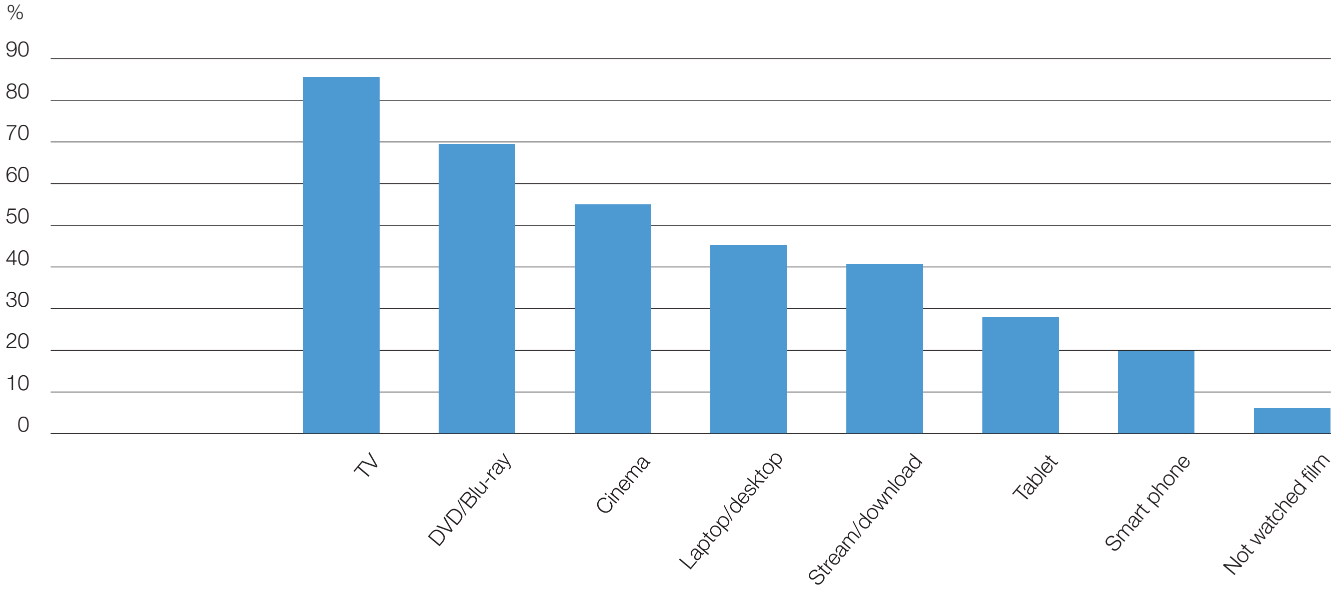
- Television remains the most popular platform for watching film in the UK, followed by DVD/Blu-ray and cinema.
- In 2015, 15-24 year olds made up the largest proportion of the UK cinema audience, at 29%.
- UK films were popular across all demographic groups, with a particularly strong appeal for those aged 45 and over. UK independent films were most popular among cinema-goers in this demographic.
- *Pitch Perfect 2* had the largest above-average audience share among the 15-24 age group, while *The Lady in the Van* had the largest share among cinema-goers aged 55 and above.
- A wide range of genres appealed to women, whereas men were drawn to films with a strong action element.
- UK films attracted above-average audiences across all nations and regions, except the North West.
- Black and minority ethnic groups were over-represented among the cinema audience; disabled audiences were over-represented amongst physical video and digital consumers.

AUDIENCES FOR FILM IN THE UK

In earlier editions of the Yearbook, we have been able to estimate the total size of the film audience in the UK based on data from a range of sources. In the last few years, however, while we have been able to track a significant growth in revenues for online services (see the Film on digital video report) we have been unable to define viewing figures for films accessed online via streaming or download-to-own.

In an era where a multitude of platforms and devices for accessing film are now available to audiences, a recent survey conducted by Morris Hargreaves McIntyre provides a snapshot of how current audiences engage with film (Figure 1). Linear television was the most popular platform for accessing film, with 86% of respondents stating they had watched a film on television in the previous 12 months. DVD or Blu-ray was the next most popular, with 70% of respondents saying they had used this platform in the previous 12 months, followed by cinema-going, with 55%.

Figure 1 Engagement with film by platform/device, 2015



	TV	DVD/Blu-ray	Cinema	Laptop/desktop	Stream/download	Tablet	Smart phone	Not watched film
Platform/device	85.6	69.5	55.0	45.3	40.7	27.9	19.9	6.1

Source: Morris Hargreaves McIntyre
Note: From *Measuring Your Reach – a market study report for the British Film Institute*. Survey conducted June 2015, survey population 3,000 adults (16+).

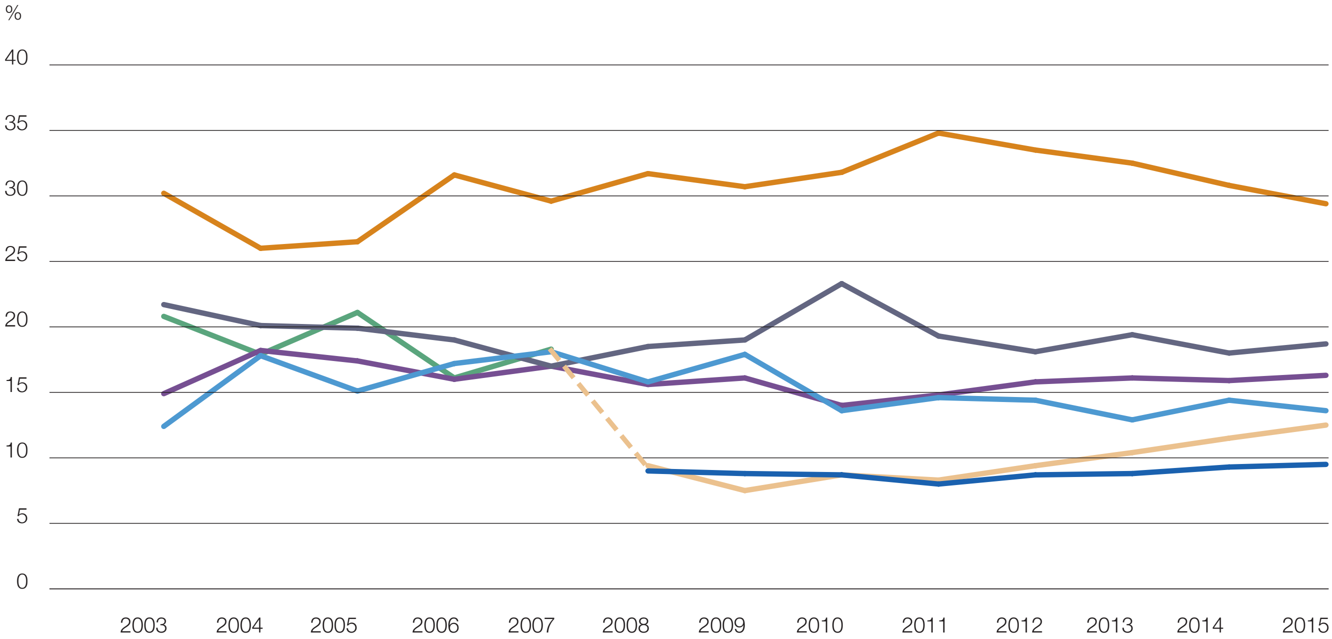
In the remainder of this report, we look at UK cinema admissions by age, cinema-goers' film preferences by age, gender, geographical location and socio-economic status, and film consumption by ethnicity and disability.

CINEMA AUDIENCE BY AGE

Figure 2 shows the age trends of cinema admissions from 2003 to 2015. The relative proportion of admissions for each category has been broadly similar throughout the time period, with fluctuations based on the release of a small number of successful titles with a strong appeal to particular age groups. However, between 2005 and 2011, there was an upward trend in the percentage of the audience drawn from 15-24 year olds, with an increase from 26% to a peak of 35%. From 2012 the share for this group decreased, with 2015 recording a 10-year low of 29%. As a counter to this decline, the share of the audience associated with the older age groups (45 and over) has increased, most notably for cinema-goers aged 55 and over, due in part to the increased availability of films appealing to this demographic and their comparatively higher disposable income and leisure time.

Interestingly, for most of the period the shares of admissions for 7-14 and 35-44 year olds have been very similar, which may be due to parents and carers taking their children to the cinema, a finding reflected in the next section showing films with above-average audiences for the different age groups.

Figure 2 Age distribution of admissions, 2003-2015



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
7-14	12.4	17.8	15.1	17.2	18.1	15.8	17.9	13.6	14.6	14.4	12.9	14.4	13.6
15-24	30.2	26.0	26.5	31.6	29.6	31.7	30.7	31.8	34.8	33.5	32.5	30.8	29.4
25-34	21.7	20.1	19.9	19.0	17.0	18.5	19.0	23.3	19.3	18.1	19.4	18.0	18.7
35-44	14.9	18.2	17.4	16.0	17.0	15.6	16.1	14.0	14.8	15.8	16.1	15.9	16.3
45+	20.8	17.9	21.1	16.1	18.3	-	-	-	-	-	-	-	-
45-54	-	-	-	-	-	9.0	8.8	8.7	8.0	8.7	8.8	9.3	9.5
55+	-	-	-	-	-	9.4	7.5	8.7	8.3	9.4	10.4	11.5	12.5

Source: CAA, Film Monitor

FILM PREFERENCES BY AGE

Tables 1-6 outline films with a statistically significant above-average audience share across different age groups to show the range of films that appealed most to each group in 2015. That is to say, highlighting films where the difference between the average audience attendance and each age group attendance for a particular film is greater than a standard statistical threshold. UK films had a significant appeal across all age groups, particularly the older age groups.

Animated features appealed most to the 7-14 age group with *Home*, *Big Hero 6* and *Minions* having the highest significant above-average audiences. Family films and fantasies such as *Pan* and *Cinderella* also appealed strongly to this group (Table 1). While action and adventure films such as *Fast & Furious 7*, *The Hunger Games: Mockingjay – Part 2* and *Kingsman: The Secret Service* dominated the list of films with the strongest appeal to 15-24 year olds, the music-based comedy *Pitch Perfect 2* had the highest significant above-average audience. The '18' certified *Fifty Shades of Grey* also had a high appeal with 30% of its audience comprised of young adults from this group (Table 2). *Fifty Shades of Grey* also appealed strongly to 25-34 year olds alongside many of the other titles that were popular with audiences from the 15-24 year old age group. (These groups were the only two to have above-average audiences for the Kray twins biopic, *Legend*, the top earning UK independent release of the year.) The film with the highest significant above-average audience share among 25-34 year olds was the action title *Mad Max: Fury Road* (Table 3).

Family-friendly titles always feature highly among the most popular films with audiences from the 35-44 year old age group, which is made up of a high percentage of parents and carers. Releases with the most significant appeal to cinema-goers in this category in 2015 were *Home*, *Hotel Transylvania 2* and *Cinderella* (Table 4). The only non-family film to achieve a significant above-average audience in this age category was *Fifty Shades of Grey*. A variety of genres were popular with cinema-goers in the two older age groups, both of which showed a strong preference for UK films. Releases attracting above-average audiences from both age groups included the latest James Bond outing, *SPECTRE*, as well as independent titles *Far from the Madding Crowd* and *The Second Best Exotic Marigold Hotel*. The film with the highest single above-average audience across all age groups in 2015 was *The Lady in the Van*, which generated 74% of its audience from cinema-goers aged 55 and over (Tables 5 and 6).

Table 1 Films with a significant above-average audience in the 7-14 age group, 2015 top 20 films and top UK films

Title	Age group % of film's total audience
Home	42
Big Hero 6	38
Minions	37
Inside Out	32
Hotel Transylvania 2	32
Shaun the Sheep the Movie (UK)	31
Pan (UK)	26
Into the Woods (UK)	26
Cinderella (UK)	24
7-14 age group share of top 20 and top UK audience (%)	16
7-14 age group in total survey population (%)	14

Source: CAA Film Monitor

Notes:

'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 the year, 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 Cinema Advertising Association (CAA) Film Monitor.

CAA Film Monitor included 82 film titles (mostly mainstream) of the 759 theatrical releases in 2015. The Film Monitor survey is carried out via a fortnightly omnibus survey of over 1,000 adults and children aged 7+, of those who had been to the cinema in the last three months. Films are also age-filtered based on the film certificate.

Table 2 Films with a significant above-average audience in the 15-24 age group, 2015 top 20 films and top UK films

Title	Age group % of film's total audience
Pitch Perfect 2	46
Fast & Furious 7	44
The Hunger Games: Mockingjay – Part 2	41
Kingsman: The Secret Service (UK)	41
Taken 3	40
Ant-Man (UK)	38
Avengers: Age of Ultron (UK)	37
The Man from U.N.C.L.E. (UK)	35
Mad Max: Fury Road	34
Legend (UK)	32
Jurassic World	32
Fifty Shades of Grey	30
15-24 age group share of top 20 and top UK audience (%)	26
15-24 age group in total survey population (%)	29

Source: CAA Film Monitor
See notes to Table 1.

Table 3 Films with a significant above-average audience in the 25-34 age group, 2015 top 20 films and top UK films

Title	Age group % of film's total audience
Mad Max: Fury Road	27
Fifty Shades of Grey	26
Terminator Genisys (UK)	25
Legend (UK)	23
The Martian (UK)	23
Jurassic World	23
Avengers: Age of Ultron (UK)	22
Fast & Furious 7	21
25-34 age group share of top 20 and top UK audience (%)	17
25-34 age group in total survey population (%)	19

Source: CAA Film Monitor
See notes to Table 1.

Table 4 Films with a significant above-average audience in the 35-44 age group, 2015 top 20 films and top UK films

Title	Age group % of film's total audience
Home	25
Hotel Transylvania 2	25
Cinderella (UK)	23
Inside Out	23
Star Wars: The Force Awakens (UK)	22
Fifty Shades of Grey	22
Minions	21
35-44 age group share of top 20 and top UK audience (%)	17
35-44 age group in total survey population (%)	16

Source: CAA Film Monitor
See notes to Table 1.

Table 5 Films with a significant above-average audience in the 45-54 age group, 2015 top 20 films and top UK films

Title	Age group % of film's total audience
Far from the Madding Crowd (UK)	17
Mission: Impossible – Rogue Nation (UK)	15
SPECTRE (UK)	13
Mad Max: Fury Road	13
The Second Best Exotic Marigold Hotel (UK)	13
45-54 age group share of top 20 and top UK audience (%)	10
45-54 age group in total survey population (%)	10

Source: CAA Film Monitor
See notes to Table 1.

Table 6 Films with a significant above-average audience in the 55+ age group, 2015 top 20 films and top UK films

Title	Age group % of film's total audience
The Lady in the Van (UK)	74
The Second Best Exotic Marigold Hotel (UK)	69
Suffragette (UK)	55
Far from the Madding Crowd (UK)	52
The Theory of Everything (UK)	34
SPECTRE (UK)	23
Everest (UK)	20
55+ age group share of top 20 and top UK audience (%)	13
55+ age group in total survey population (%)	13

Source: CAA Film Monitor
See notes to Table 1.

FILM PREFERENCES BY GENDER

The overall audience for the top 20 and top UK films in 2015 had a very slight bias towards males who made up 51% of total cinema-goers for these films. On an individual basis, some films attracted substantially more of one gender than the other. Table 7 shows the top six films with statistically significant above-average male and female audiences, and the three films that had no significant gender appeal. Titles with a strong action element were particularly popular among male audiences, with *Terminator Genisys*, *Mad Max: Fury Road* and *The Man from U.N.C.L.E.* topping the list of films with a greater appeal. Female audiences were drawn to a broader range of films, with *Cinderella*, *Pitch Perfect 2* and *Fifty Shades of Grey* having the greatest above-average appeal. Unlike in previous years, in 2015 male audiences had a stronger preference for UK films compared to female audiences, with all but one of the top six films with an above-average male audience share being British.

Table 7 Audience gender split, 2015 top 20 films and top UK films

Significant greater male audience share	Male %	Female %
Terminator Genisys (UK)	73	27
Mad Max: Fury Road	71	29
The Man from U.N.C.L.E. (UK)	69	31
Avengers: Age of Ultron (UK)	69	31
Ant-Man (UK)	66	34
The Martian (UK)	63	37

Significant greater female audience share	Male %	Female %
Cinderella (UK)	21	79
Pitch Perfect 2	25	75
Fifty Shades of Grey	27	73
Suffragette (UK)	31	69
The Second Best Exotic Marigold Hotel (UK)	34	66
Inside Out	34	66

Gender difference not significant	Male %	Female %
Everest (UK)*	58	42
The Hunger Games: Mockingjay – Part 2	50	50
Big Hero 6	49	51

Source: CAA Film Monitor

*Based on the methodology used to measure average audiences in this data, *Everest*, is included here as it does not have a statistically significant above-average audience of either gender.

See notes to Table 1.

FILM PREFERENCES BY SOCIAL GROUP

UK films were popular among all social groups in 2015, in most cases attracting a significant above-average audience share. Tables 8-11 outline the films with the strongest significant appeal to each group in the year.

All of the films that attracted significant above-average audiences from the AB social group were UK qualifying titles, with *Far from the Madding Crowd*, *Suffragette* and *The Second Best Exotic Marigold Hotel* having the strongest appeal. The top two films of 2015, *Star Wars: The Force Awakens* and *SPECTRE*, were also popular with this group (Table 8).

Table 8 Films with significant above-average AB audience share, 2015 top 20 films and top UK films

Title	AB group % of film's total audience
Far from the Madding Crowd (UK)	53
Suffragette (UK)	52
The Second Best Exotic Marigold Hotel (UK)	52
The Theory of Everything (UK)	47
The Lady in the Van (UK)	44
SPECTRE (UK)	38
Star Wars: The Force Awakens (UK)	37
AB share of top 20 and top UK audience (%)	33
AB in total survey population (%)	31

Source: CAA Film Monitor
See notes to Table 1.

Four films, two of which were UK titles, attracted significant above-average audiences from the C1 social group (Table 9). The two most popular releases were the non-UK films *The Hunger Games: Mockingjay – Part 2* and *Mad Max: Fury Road*.

Table 9 Films with significant above-average C1 audience share, 2015 top 20 films and top UK films

Title	C1 group % of film's total audience
The Hunger Games: Mockingjay – Part 2	41
Mad Max: Fury Road	41
Legend (UK)	39
Avengers: Age of Ultron (UK)	37
C1 share of top 20 and top UK audience (%)	34
C1 in total survey population (%)	34

Source: CAA Film Monitor.
See notes to Table 1.

Animations, comedies and action films, mainly produced by the major Hollywood studios, appealed most to the C2 and DE social groups (Tables 10 and 11). Animated comedy *Hotel Transylvania 2* attracted the highest above-average audience for the C2 group, while the French-produced action thriller *Taken 3*, had the greatest appeal for the DE group. These were the only two social groups to have significant above-average audiences for the adult drama *Fifty Shades of Grey*. While no UK films had a significant appeal for audiences in the C2 group, two UK studio-backed titles, *Terminator Genisys* and *Cinderella*, attracted significant above-average audiences from the DE group.

Table 10 Films with significant above-average C2 audience share, 2015 top 20 films and top UK films

Title	C2 group % of film's total audience
Hotel Transylvania 2	24
Home	23
Pitch Perfect 2	23
Minions	23
Big Hero 6	23
Fifty Shades of Grey	22
Fast & Furious 7	21
C2 share of top 20 and top UK audience (%)	18
C2 in total survey population (%)	19

Source: CAA Film Monitor
See notes to Table 1.

Table 11 Films with significant above-average DE audience share, 2015 top 20 films and top UK films

Title	DE group % of film's total audience
Taken 3	29
Fast & Furious 7	26
Terminator Genisys (UK)	21
Hotel Transylvania 2	20
Home	19
Fifty Shades of Grey	19
Cinderella (UK)	18
DE share of top 20 and top UK audience (%)	15
DE in total survey population (%)	16

Source: CAA Film Monitor
See notes to Table 1.

FILM PREFERENCES BY NATION OR REGION

The national and regional distribution of audiences for the 2015 top 20 films and top UK films focuses on releases that attracted an above-average audience in each ISBA television region as defined by the Cinema Advertising Association (for ease of understanding the data are presented by geographic region). The survey which provides this data does not include Northern Ireland.

Every television region covered by the survey had at least two films which attracted significant above-average audiences, with the exception of Scotland which had only one release from the 2015 top 20 films and top UK films with a significant above-average audience. UK films attracted above-average audiences in each nation or region apart from the North West. Tables 12-19 show the nations or regions which had four or more films with a significant above-average audience (except Wales and Scotland) to give an impression of the range of films that appealed most in each area.

Yorkshire and The Humber had the highest number of releases with a significant above-average audience in 2015, with seven films including *The Man from U.N.C.L.E.*, *The Second Best Exotic Marigold Hotel* and *Legend* (Table 12). Five of the seven titles with significant appeal were UK films.

Table 12 Films with significant above-average Yorkshire and The Humber audience share, 2015 top 20 films and top UK films

Title	Yorkshire and The Humber % of film's total audience
The Man From U.N.C.L.E. (UK)	17
The Second Best Exotic Marigold Hotel (UK)	15
Legend (UK)	14
Everest (UK)	13
Cinderella (UK)	13
Fifty Shades of Grey	13
Fast & Furious 7	11
Yorkshire and The Humber share of top 20 and top UK audience (%)	9
Yorkshire and The Humber in total survey population (%)	9

Source: CAA Film Monitor.
Yorkshire and The Humber corresponds to the ISBA Yorkshire region.
See notes to Table 1.

UK films also made up the majority of releases with significant appeal in the Midlands, although the title with the highest above-average audience was the independent American-German co-production, *The Hunger Games: Mockingjay – Part 2* (Table 13).

Table 13 Films with a significant above-average Midlands audience share, 2015 top 20 films and top UK films

Title	Midlands % of film's total audience
The Hunger Games: Mockingjay – Part 2	23
Pan (UK)	23
The Lady in the Van (UK)	23
SPECTRE (UK)	21
Into the Woods (UK)	20
Midlands share of top 20 and top UK audience (%)	16
Midlands in total survey population (%)	15

Source: CAA Film Monitor.
Midlands corresponds to the ISBA Central region.
See notes to Table 1.

In the North West, all the films with significant above-average audiences were American studio productions, with *Jurassic World* and *Pitch Perfect 2* having the greatest appeal (Table 14).

Table 14 Films with significant above-average North West audience share, 2015 top 20 films and top UK films

Title	North West % of film's total audience
Jurassic World	15
Pitch Perfect 2	15
Fast & Furious 7	14
Minions	14
North West share of top 20 and top UK audience (%)	12
North West in total survey population (%)	12

Source: CAA Film Monitor
North West corresponds to the ISBA Granada region.
See notes to Table 1.

The action re-boot *Mad Max: Fury Road* attracted the highest significant above-average audience in London and the home counties in 2015, while *The Martian* was the only UK film to have a significant appeal (Table 15).

Table 15 Films with significant above-average London and the home counties audience share, 2015 top 20 films and top UK films

Title	London/home counties % of film's total audience
Mad Max: Fury Road	27
Home	24
The Martian (UK)	24
Fast & Furious 7	23
London share of top 20 and top UK audience (%)	20
London in total survey population (%)	21

Source: CAA Film Monitor
London and the home counties corresponds to the ISBA LWT Carlton region.
See notes to Table 1.

All of the releases with significant appeal to audiences in the South East and South West were UK films, with independent titles heading the lists in both regions (Tables 16 and 17). *Far from the Madding Crowd* had the highest above-average audience in the South East and *Suffragette* had the highest above-average audience in the South West.

Table 16 Films with significant above-average South East audience share, 2015 top 20 films and top UK films

Title	South East % of film's total audience
Far from the Madding Crowd (UK)	21
The Second Best Exotic Marigold Hotel (UK)	15
The Theory of Everything (UK)	14
Star Wars: The Force Awakens (UK)	13
South East share of top 20 and top UK audience (%)	11
South East in total survey population (%)	10

Source: CAA Film Monitor
South East corresponds to the ISBA Meridian region.
See notes to Table 1.

Table 17 Films with significant above-average South West audience share, 2015 top 20 films and top UK films

Title	South West % of film's total audience
Suffragette (UK)	10
The Lady in the Van (UK)	10
SPECTRE (UK)	9
Star Wars: The Force Awakens (UK)	6
South West share of top 20 and top UK audience (%)	5
South West in total survey population (%)	4

Source: CAA Film Monitor
South West corresponds to the ISBA TSW region.
See notes to Table 1.

The few releases to achieve significant above-average audiences in Wales and Scotland were all UK films. *Terminator Genisys* had the greatest appeal in Wales, while *The Theory of Everything* had the greatest appeal in Scotland (Tables 18 and 19).

Table 18 Films with significant above-average Wales audience share, 2015 top 20 films and top UK films

Title	Wales % of film's total audience
Terminator Genisys (UK)	12
Shaun the Sheep the Movie (UK)	11
Wales share of top 20 and top UK audience (%)	8
Wales in total survey population (%)	8

Source: CAA Film Monitor
Wales corresponds to the ISBA HTV region.
See notes to Table 1.

Table 19 Films with significant above-average Scotland audience share, 2015 top 20 films and top UK films

Title	Scotland % of film's total audience
The Theory of Everything (UK)	11
Scotland share of top 20 and top UK audience (%)	8
Scotland in total survey population (%)	9

Source: CAA Film Monitor
Scotland corresponds to the ISBA Border, STV and Grampian regions.
See notes to Table 1.

FILM AUDIENCE BY ETHNICITY

Looking across film platforms, black and minority ethnic groups (Asian, Chinese, mixed and other) were over-represented among theatrical audiences, and under-represented among video and digital buyers and renters (Table 20). White audiences were over-represented among video buyers and under-represented among film consumers on other platforms.

Table 20 Ethnicity of audiences aged 13+ for cinema, retail and rental video and digital, 2015

	Black, Asian, Chinese, mixed and other %	White %
Population aged 13+	7.9	93.8
Total buyers of cinema, retail, rental and digital film	7.7	92.3
Cinema-goers	9.5	90.6
Video buyers	4.4	95.6
Video renters	6.6	93.4
Digital buyers and renters	7.8	92.2

Source: Kantar Worldpanel
Notes:
Fieldwork took place in January 2016.
Video includes all physical video formats, including DVD, Universal Media Disc, high-definition DVD and Blu-ray.
Digital includes subscription VoD services.

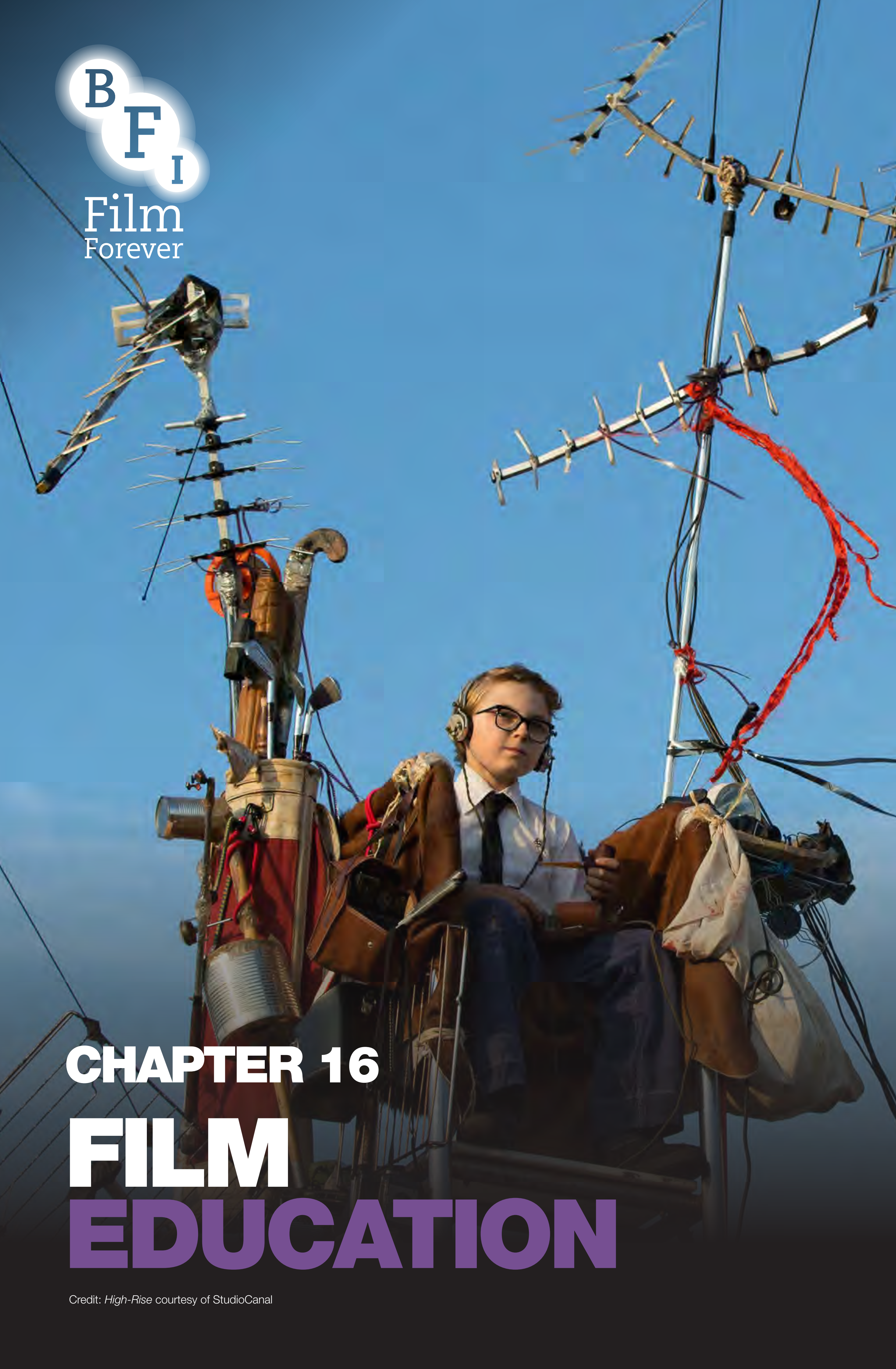
FILM AUDIENCES BY DISABILITY

Unlike in previous years, disabled people were over-represented across all film platforms in 2015 with the exception of theatrical, where they made up 14.5% of the audience (Table 21). Disabled audiences were most over-represented as buyers of video.

Table 21 Disabled audiences aged 13+ for cinema, retail and rental video and digital, 2015

	Disabled %	Not disabled %
Population aged 13+	19.8	80.2
Total buyers of cinema, retail, rental and digital film	18.4	81.6
Cinema-goers	14.5	85.5
Video buyers	22.0	78.0
Video renters	20.6	79.9
Digital buyers and renters	21.3	78.7

Source: Kantar Worldpanel
See notes to Table 20.



CHAPTER 16

FILM EDUCATION

Credit: *High-Rise* courtesy of StudioCanal

FILM EDUCATION

Film education offers children and young people opportunities to watch, understand and make films to enrich their lives, foster personal development, express their creativity and gain essential skills. For adult learners, film education can also be a stimulating part of lifelong learning.

FACTS IN FOCUS

- In 2015/16, more than 565,000 children and young people participated in the Into Film programme across the UK.
- In 2015/16, just over 81,500 students were entered for GCSE and A Level media studies related courses and almost 3,000 students were entered for Scottish Intermediate/National and Higher courses.
- In 2014/15 (the last year for which data is available), there were just under 22,000 entries for higher education media related courses.
- In 2015/16, the BFI Film Academy provided opportunities for 865 16-19 year olds to develop new skills and build careers in the film industry.
- There were just under 46,700 admissions to education events run by BFI Southbank and BFI festivals in 2015/16.

[1] *Impact, Relevance and Excellence: a new stage for film education,* BFI 2014

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.

Over the past few years, the BFI has worked with a range of partners in the private, cultural and education sectors to help forge an overarching strategy for film education in the UK. The emerging plan upholds the belief that in the new digital landscape, the moving image should be acknowledged as having the same educational value as the printed text, and that film should be integrated into all forms of education, learning, training, cultural appreciation and understanding.

This report presents the most up-to-date record of film education related data currently available, beginning with a look at activity in formal education settings.

FILM EDUCATION IN FORMAL EDUCATION SETTINGS

In practice, film education activity has traditionally involved 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 increasingly used in other parts of the curriculum, such as science, English or modern languages.

In 2013, FILMCLUB and First Light, providers of film education and filmmaking opportunities for children and young people, merged to form Into Film, a charity focused on making film an integrated part of education for 5-19 year olds. Supported by the BFI and a range of other funders, Into Film represents one of the largest ever investments in film education for the formal sector and is intended to 'create a critical shift from film education work *around* the school to work within the classroom'[1]. This is done primarily through providing educational resources to support the current curriculum: incorporating film-based resources into lessons and providing resources for watching, making and learning about film within its network of schools' film clubs. (Film clubs supported by Into Film also operate in non-school settings such as youth clubs, cinemas and libraries.)

In 2015/16, Into Film trained and enabled almost 12,600 teaching professionals and youth leaders to work with film across the curriculum (including film studies) and just under 161,000 sets of educational resources were downloaded. Resources range from curriculum linked worksheets, lesson plans and presentations to film discussion guides, supported by a catalogue of selected films primarily available for use within film clubs.

Table 1 shows the most popular films ordered from the catalogue in 2015/16. The list is comprised of mainstream, family-orientated films, reflecting the much larger primary school presence in the UK education system and registered film clubs. The top three films in the table – *Inside Out, Minions* and *Big Hero 6* – were among the top 20 highest earning releases at the UK and Republic of Ireland box office in 2015.

Table 1 Top 10 films ordered from Into Film 2015/16

	Film	Country of origin	Year of theatrical release	Number of orders
1	Inside Out	USA	2015	509
2	Minions	USA/Fra	2015	197
3	Big Hero 6	USA	2015	190
4	Monsters, Inc.	USA	2002	144
5	The Lion King	USA	1994	142
6	Paddington	UK/Fra	2014	131
7	Home	USA	2015	122
8	E.T. the Extra Terrestrial	USA	1982	115
9	Shaun the Sheep the Movie	UK	2015	114
10	Labyrinth	UK/USA	1986	93

Source: Into Film

The total number of film clubs registered with Into Film increased by 33% between 2014/15 and 2015/16, rising from 12,134 to 16,147 (Table 2). As part of an evaluation of the Into Film programme, a survey carried out at the end of 2015 estimated that 56% of the registered clubs were active at that time. (An active club is one that is providing some kind of film-based activity on a regular basis.) The survey found, however, that Into Film resources and services were still being used by teachers in a number of schools with registered film clubs that were not currently active.

Overall, the reach of the programme has increased, from 424,690 pupils in 2014/15 to an estimated 565,110 in 2015/16. Across the programme as a whole, 1,502 films were made over the year and a total of 12,842 children and young people participated in filmmaking activities.

Table 2 National/regional distribution of registered film clubs[1], 2014/15 and 2015/16

	2014/15		2015/16	
Nation/region	**Number of film clubs**	**% of film clubs**	**Number of film clubs**	**% of film clubs**
England	9,192	75.8	12,321	76.3
London	1,412	11.6	1,885	11.7
South East	1,260	10.4	1,761	10.9
North West	1,197	9.9	1,689	10.5
South West	1,007	8.3	1,295	8.0
East Midlands	995	8.2	1,295	8.0
West Midlands	990	8.2	1,343	8.3
Yorkshire and The Humber	972	8.0	1,306	8.1
East of England	783	6.5	1,008	6.2
North East	576	4.8	739	4.6
Scotland	901	7.4	1,434	8.9
Wales	725	6.0	990	6.1
Northern Ireland	611	5.0	820	5.1
Isle of Man	19	0.2	16	0.1
No nation/region stated	686	5.7	566	3.5
Total	**12,134**	**100.0**	**16,147**	**100.0**

Source: Into Film
Notes:
[1] Film clubs registered with Into Film, including both active and inactive clubs.
Percentages may not sum to 100 due to rounding.

One of Into Film's flagship events is the annual Into Film Festival, a UK-wide programme of free film screenings and related activities for children and young people, industry-funded through Cinema First. The festival aims to build on the success of National Schools Film Week previously run by the charity Film Education which closed in April 2013. Table 3 shows the numbers of children and young people who participated in National Schools Film Week and the Into Film Festival between 2009 and 2015.

In 2015, over 353,000 children and young people (and over 61,000 education professionals) attended the festival. It showed 157 UK and international films at 2,700 screenings in 527 cinemas across the UK, and hosted 180 special events (previews, Q&As with industry professionals, careers talks and filmmaking workshops) aimed at expanding young people's understanding and engagement with film.

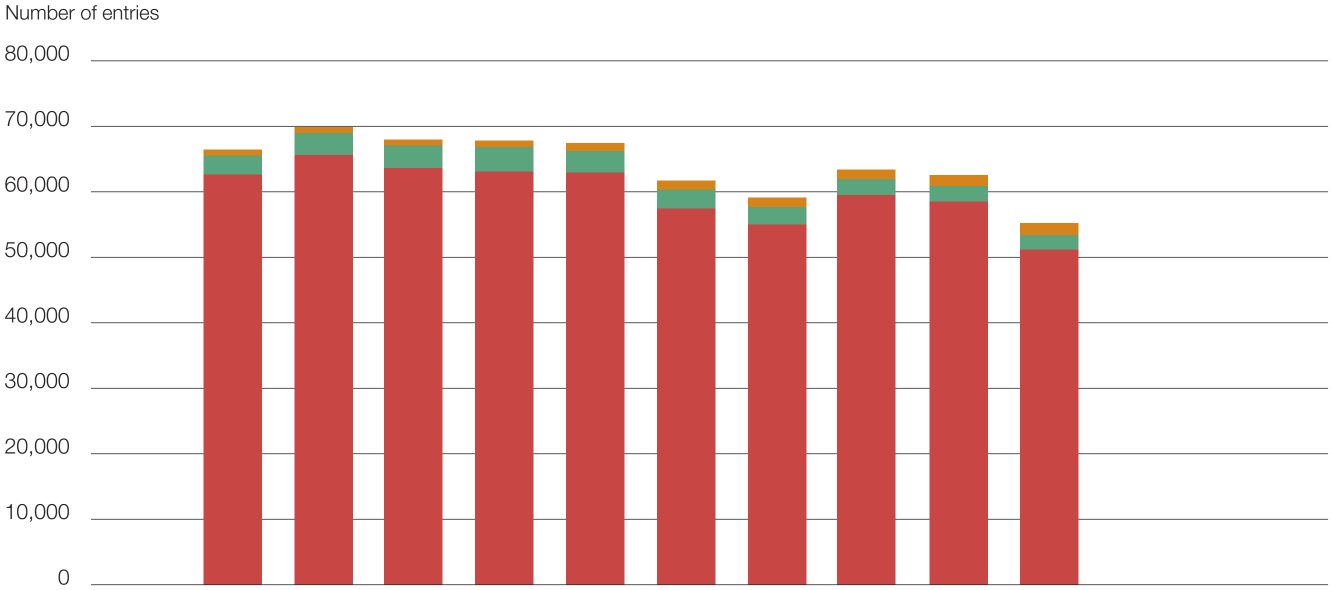
Table 3 Attendances at National Schools Film Week and the Into Film Festival, 2009-2015

	2009	2010	2011	2012	2013	2014	2015
National Schools Film Week	392,452	473,000	469,000	541,744	-	-	-
Into Film Festival	-	-	-	-	246,434	317,189	353,416

Source: Film Education, Into Film
Note: Figures are for attendances by children and young people only; they do not include education professionals or other adult attendees.

In terms of film and media specific subjects taught in schools and colleges, there has been a 20% decrease in the overall number of students entering GCSE media, film or TV studies in England, Wales and Northern Ireland since 2006/07 (Figure 1). While the numbers of entries in England have fluctuated over the period, and in Wales have decreased since 2009/10, Northern Ireland has mainly seen year-on-year increases. Overall entries in 2015/16 were just under 53,500, around 1% of all GCSE entries.

Figure 1 Entries for GCSE media/film/TV studies in England, Wales and Northern Ireland, 2006/07-2015/16

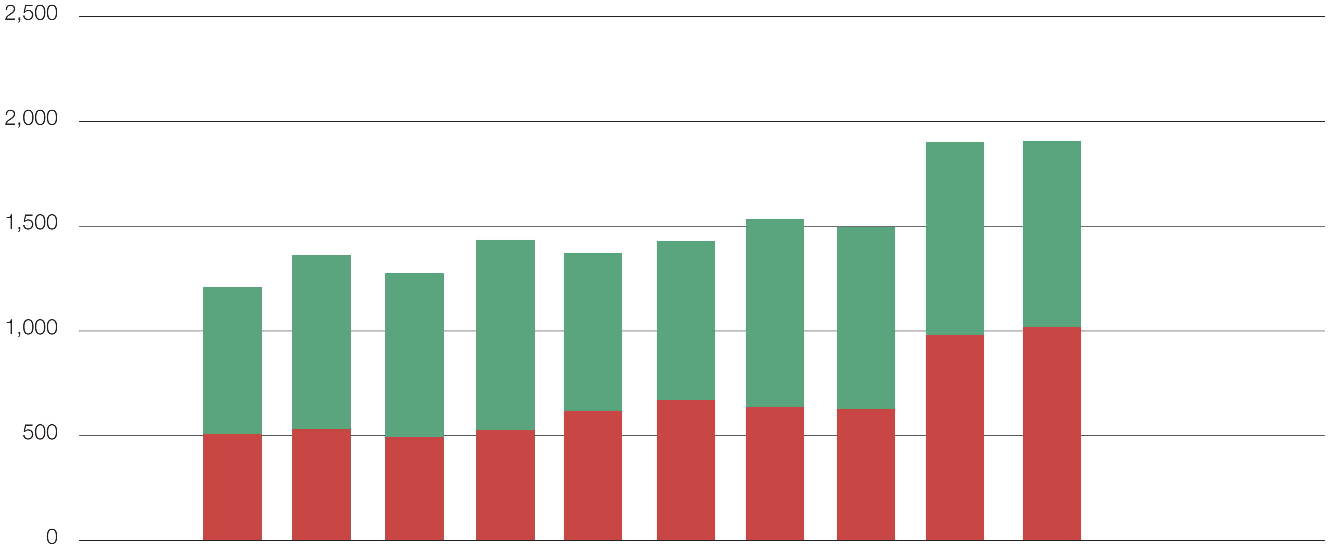


	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	% change 2014/15-2015/16	% change 2006/07-2015/16
England	62,683	65,693	63,685	63,134	62,915	57,451	55,005	59,536	58,496	51,209	-12.5	-18.3
Wales	2,874	3,288	3,438	3,705	3,357	2,905	2,659	2,456	2,350	2,248	-4.3	-21.8
Northern Ireland	868	842	849	925	1,161	1,324	1,450	1,444	1,606	1,771	10.3	104
Total	**66,425**	**69,823**	**67,972**	**67,764**	**67,433**	**61,680**	**59,114**	**63,436**	**62,452**	**53,457**	**-14.4**	**-19.5**
All GCSE entries	5,752,152	5,827,319	5,669,077	5,469,260	5,151,970	5,225,288	5,445,324	5,217,573	5,277,604	5,240,796	-0.7	-8.9

Source: Joint Council for Qualifications
Notes:
These numbers, published in August 2016, are provisional and do not include the results from any appeals, declines or late cash-ins.
Scotland is not included because of its separate examinations system.

There was a total of 1,907 entries for Scottish Intermediate Levels 1 and 2/National Levels 4 and 5 media studies in 2016, just under 0.5% of all equivalent level entries, and an increase of 0.4% compared with 2015 (Figure 2). Since 2007, there has been a 58% increase in the number of entries, which may partly be explained by the changes in the Scottish qualifications system and curriculum.

Figure 2 Entries for Scottish Intermediate/National Level media studies, 2007-2015

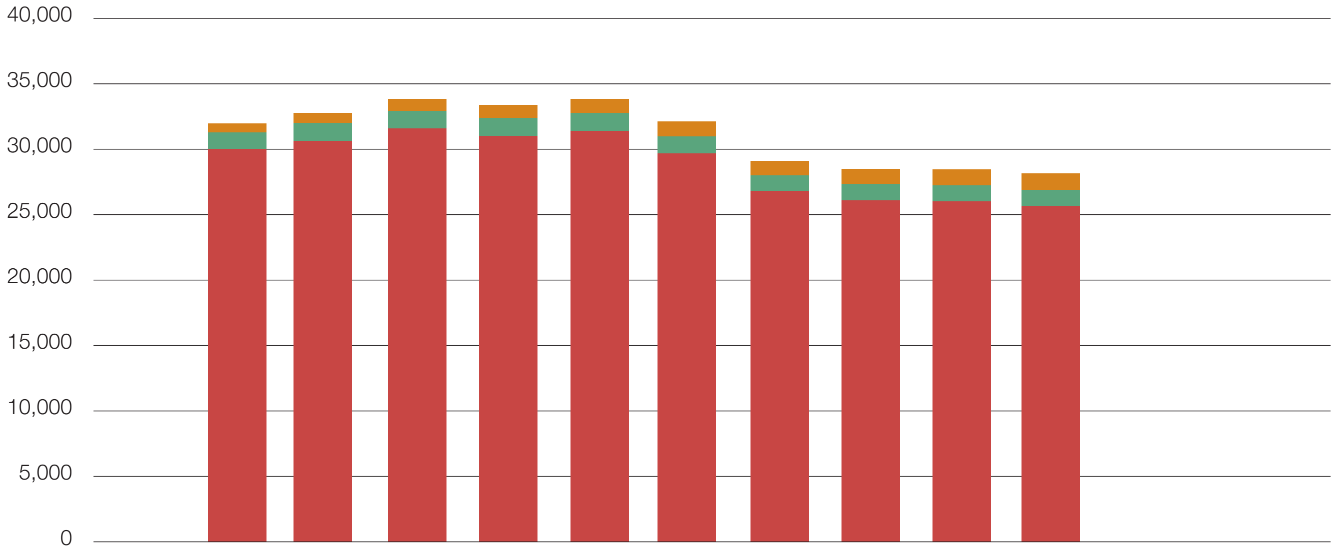


	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2015-2016	% change 2007-2016
Intermediate Level 1/National Level 4 entries	509	534	493	528	617	671	636	629	979	1,018	4.0	100.0
Intermediate Level 2/National Level 5 entries	701	828	781	906	756	758	895	866	920	889	-3.4	26.8
Total	**1,210**	**1,362**	**1,274**	**1,434**	**1,373**	**1,429**	**1,531**	**1,495**	**1,899**	**1,907**	**0.4**	**57.6**
Intermediate Level 1/National Level 4 all entries	53,840	60,267	65,735	69,834	65,437	67,753	63,213	150,390	132,429	130,876	-1.2	143.1
Intermediate Level 2/National Level 5 all entries	107,340	113,388	122,463	130,497	132,380	137,223	140,612	310,725	298,694	295,083	-1.2	174.9

Source: Scottish Qualifications Authority
Note: Figures from 2012 have been updated since publication of the 2015 Yearbook.

The total number of students taking GCE A Level media, film or TV studies in England, Wales and Northern Ireland has fallen by 12% since 2006/07 (Figure 3). As with GCSE entries, the overall trend is not reflected in Northern Ireland, where entries have increased by over 90% during the period. The total number of entries across the three nations in 2015/16 was just over 28,100.

Figure 3 Entries for GCE A Level media/film/TV studies in England, Wales and Northern Ireland, 2006/07-2015/16

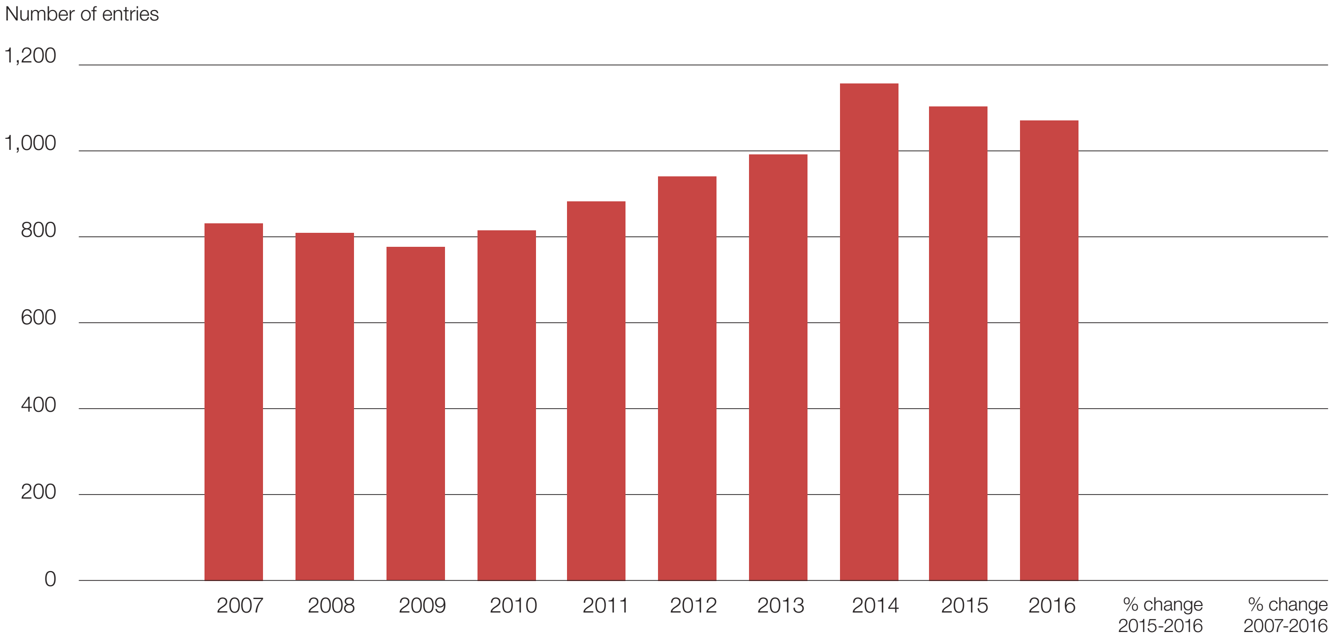


	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	% change 2014/15-2015/16	% change 2006/07-2015/16
England	30,036	30,651	31,618	31,032	31,400	29,682	26,848	26,116	26,036	25,693	-1.3	-14.5
Wales	1,252	1,353	1,307	1,380	1,403	1,288	1,191	1,247	1,224	1,197	-2.2	-4.4
Northern Ireland	654	745	897	963	1,052	1,141	1,073	1,134	1,207	1,250	3.6	91.1
Total	**31,942**	**32,749**	**33,822**	**33,375**	**33,855**	**32,111**	**29,112**	**28,497**	**28,467**	**28,140**	**-1.1**	**-11.9**
All GCSE entries	805,657	827,737	846,977	853,933	867,317	861,819	850,752	833,807	850,749	836,705	-1.7	3.9

Source: Joint Council for Qualifications
See notes to Figure 1.

Despite fluctuations in total annual entries, the number of students taking Scottish Higher media studies has increased by 29% since 2007. In 2016, there were 1,055 entries, down 3% compared with 2015 (Figure 4).

Figure 4 Entries for Scottish Higher media studies, 2007-2016



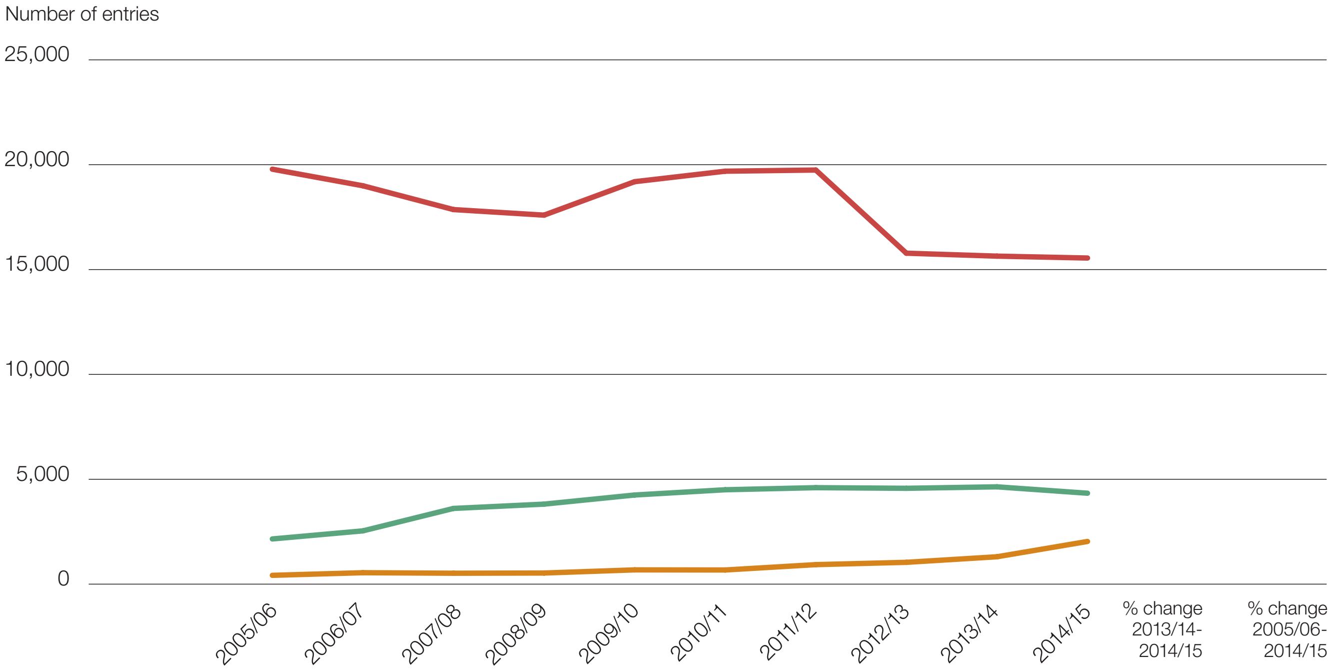
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2015-2016	% change 2007-2016
Number of media studies entries	819	797	765	803	870	927	977	1,140	1,087	1,055	-2.9	28.8
All Higher entries	161,081	162,576	167,792	175,614	178,279	181,032	182,730	191,859	199,850	197,774	-1.0	22.8

Source: Scottish Qualifications Authority
Note: Figures from 2012 have been updated since publication of the 2015 Yearbook.

Study of the moving image and allied creative industries remains popular in UK higher education through film and media studies courses. Almost 22,000 students were enrolled on such courses in 2014/15 (the latest year for which we have data), a slight increase on the number of entries in 2013/14 (Figure 5). Overall, however, entries have fallen slightly over the period covered in the chart, from 22,360 in 2005/06 to 21,920 in 2014/15.

Entries for media studies courses were highest at the start of the period, at 19,785, but have fluctuated since then, falling to a low of 15,550 in 2014/15. Film studies entries have increased almost year on year over the period; in 2014/15 there were 4,335 entries compared with 2,155 in 2005/06, a rise of 101%. The number of students undertaking film production courses has seen the largest increase over the period (385%), rising from 420 in 2005/06 to 2,035 in 2014/15.

Figure 5 Higher education students in film and media studies, 2005/06-2014/15



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	% change 2013/14-2014/15	% change 2005/06-2014/15
Media studies	19,785	18,995	17,860	17,595	19,190	19,690	19,745	15,780	15,640	15,550	-0.6	-21.4
Film studies	2,155	2,540	3,610	3,815	4,250	4,500	4,600	4,570	4,640	4,335	-6.6	101.2
Film production	420	545	520	530	680	675	930	1,040	1,305	2,035	55.9	384.5
Total	**22,360**	**22,080**	**21,990**	**21,940**	**24,120**	**24,865**	**25,275**	**21,390**	**21,585**	**21,920**	**1.6**	**-2.0**

Source: HESA
Notes:

Figures have been rounded to the nearest multiple of 5.
Includes first degree, post-graduate and other degrees.
Media studies related courses include media, film, television, radio, electronic and print-based media studies courses.

Many of the film and media related further and higher education courses are accredited (via the 'Tick' quality mark) by Creative Skillset, the UK-wide strategic skills body for the creative industries. The Creative Skillset Tick is an assurance that courses provide the most up-to-date and relevant industry training and education. In 2015/16, 215 accredited courses were offered across the UK, the majority of which were higher education programmes. These included 27 courses in film production, nine courses in screenwriting and three in post-production.

FILM EDUCATION AS A PROGRESSION ROUTE

Learning about film can be enhanced by practical involvement in filmmaking. In addition to the development of critical, creative and cultural skills, gaining filmmaking experience, particularly at an early age, can be a key stepping stone to the development of a career in the film industry.

In 2012, the BFI launched the Film Academy – supported now by the Department for Education in England, the National Lottery, Creative Scotland and Northern Ireland Screen – which was designed to help 16-19 year olds develop the necessary skills to enter the film industry.

Over its first four years the Academy has provided opportunities for talented young people from a range of backgrounds to enjoy out-of-school and residential filmmaking experience, delivered through partner organisations across the UK and with industry bodies such as BAFTA, Creative Skillset and Pinewood Studios. In 2015/16 the Academy worked with over 45 delivery partners reaching 865 young people UK wide (Table 4). Across all courses in 2015/16, 24% of participants were from black and minority ethnic backgrounds and 6% were disabled.

Table 4 BFI Film Academy participants, 2012/13-2015/16

Nation/region	2012/13	2013/14	2014/15	2015/16
England	425	552	582	679
London	95	146	148	146
South West	57	70	71	97
South East	52	74	73	88
Yorkshire and The Humber	27	31	37	78
East of England	49	66	62	71
West Midlands	28	30	52	60
North West	49	57	57	52
North East	34	42	44	47
East Midlands	34	36	38	40
Northern Ireland	-	63	85	80
Scotland	-	56	72	74
Wales	-	49	44	32
Total	**425**	**720**	**783**	**865**

Source BFI

OTHER FILM EDUCATION ACTIVITY

In addition to the activity described above, there are many other organisations involved in the delivery of film education in the UK at both a national and regional level including independent cinemas, regional film archives, training providers and community-based groups. Provision for adult learners in 2015/16 ranged from informal initiatives such as the film club at the Robert Burns Centre in Dumfries, which offered weekly film screenings followed by discussions with club members, to more structured learning programmes such as the evening and full-day courses in film criticism and genre at the Phoenix Cinema in London. A number of new initiatives for younger learners were launched during the year, including a pilot of the Hereford-based Rural Media Company's Film and Media Education (FAME) project, an online learning resource which sought to demonstrate the unique value of locally produced film within cross-curricular education and training for 5-19 year olds, and Screen Education Edinburgh's pilot delivery of the Moving Image Arts (MIA) Northern Irish GCSE and A Level qualifications in Scotland.

The BFI continues to run programmes for learners of all ages at BFI Southbank and as part of its festival outreach. Film education for children and young people is provided through events, study days and INSETs for primary, secondary and A Level students, while families can learn about film together through creative workshops and activity days. For adult learners (including higher education students), the BFI runs an annual series of one-off and sustained learning experiences including library talks, courses, introduced screenings and discussion events.

In 2015/16, there were 46,700 admissions to education events run by BFI Southbank and BFI festivals, a decrease from 48,400 admissions in 2014/15, but up 189% on 2006/07 (Table 5). The number of visits to the BFI Reuben Library increased from 72,500 in 2014/15 to 73,100 in 2015/16. (Visits to the Library increased substantially between 2011/12 and 2012/13 following its relocation from the BFI head office to BFI Southbank.)

Table 5 BFI education attendances, 2006/07-2015/16

	BFI Southbank and festivals education event admissions	BFI Reuben Library visits
2006/07	16,754	11,919
2007/08	37,678	11,905
2008/09	36,697	12,024
2009/10	38,569	10,969
2010/11	43,532	10,983
2011/12	42,000	11,900
2012/13	43,363	62,000
2013/14	44,641	69,592
2014/15	48,365	72,502
2015/16	46,669	73,146
% change 2014/15-2015/16	-3.8	4.2
% change 2006/07-2015/16	188.7	503.0

Source: BFI

CHAPTER 17

SCREEN SECTOR PRODUCTION IN 2015

Image: *A United Kingdom* courtesy of Pathé UK

SCREEN SECTOR PRODUCTION IN 2015

The value of feature film production spend in the UK in 2015 was £1.4 billion, 83% of which was associated with inward investment features. The UK production spend of qualifying high-end television and animation programmes was £788 million, while the UK spend of qualifying video games was £59.5 million.

FACTS IN FOCUS

- Total UK film production activity in 2015 was £1,410 million, down 6% from £1,497 million in 2014, but still the second highest total since records began.
- There were 124 domestic UK features (224 in 2014), 30 co-productions (37 in 2014) and 47 inward investment features (49 in 2014).
- The UK spend associated with inward investment features was £1,177 million, down 6% from £1,247 million in 2014.
- Fifteen big budget films (£30 million or over) accounted for 73% of the total UK film production spend.
- The UK spend associated with domestic high-end television (HETV) programmes was £380 million, just over half (50.1%) of the total UK HETV production spend.
- The UK spend of qualifying animation programmes was £29 million, while video games production generated a UK spend of £59.5 million.

THE VALUE OF UK FILM PRODUCTION

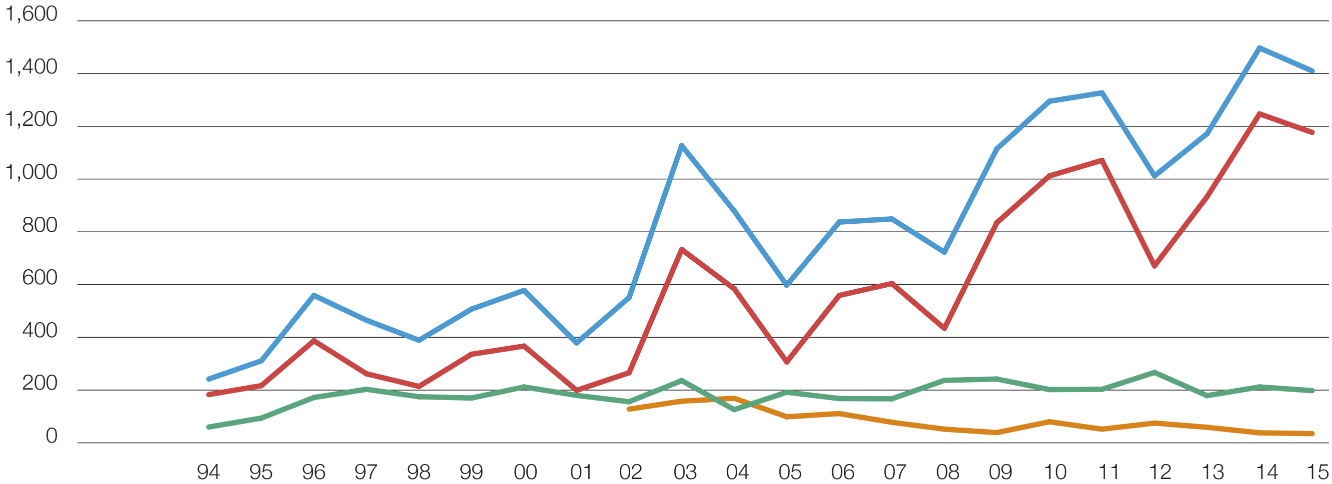
As Figure 1 shows, the aggregate UK spend of features that commenced principal photography in 2015 was £1,410 million, a slight decrease on 2014's record-breaking total of £1,497 million, but still the second highest figure since our records began. The high totals of these two years coincides with the extended tax relief introduced by the UK government in 2014.

Inward investment films contributed £1,177 million towards the total UK film production spend in 2015, a decrease of 6% from £1,247 million in 2014. However, the proportion of UK spend attributed to inward features was the same in both years, at 83%. Some of the big budget films contributing to this figure were *Rogue One: A Star Wars Story, Fantastic Beasts and Where to Find Them, Assassin's Creed* and *Pirates of the Caribbean: Dead Men Tell No Tales*.

Domestic UK features, including *A United Kingdom, The Girl with All the Gifts* and *Florence Foster Jenkins* spent £198 million in the UK, down £14 million (7%) from 2014. The UK spend of official and unofficial co-productions was £35 million, down from £38 million in 2014. Co-productions commencing principal photography in the year included *The Danish Girl, I, Daniel Blake* and *The Receptionist*.

Figure 1 also shows that since 1994, both the growth and annual variation in the total value of UK spend has principally been driven by inward investment and how it fluctuates from year to year. The UK spend of domestic UK films has been broadly stable over this period, with an average of around £200 million per year, while there has been a decline in the UK spend of co-productions following changes to the UK film tax relief in 2007.

Figure 1 UK spend of feature films produced in the UK, 1994-2015, £ million



	94	95	96	97	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15
Inward investment	183	217	387	262	214	336	367	199	266	733	584	307	559	604	434	835	1,012	1,071	671	933	1,247	1,177
Domestic UK	60	94	172	203	175	170	212	180	156	236	126	192	168	167	237	242	202	203	267	179	212	198
Co-production	-	-	-	-	-	-	-	-	128	158	169	99	111	78	52	39	80	52	75	59	38	35
Total	**242**	**311**	**559**	**465**	**389**	**507**	**578**	**379**	**551**	**1,127**	**879**	**598**	**837**	**849**	**723**	**1,115**	**1,295**	**1,327**	**1,012**	**1,172**	**1,497**	**1,410**

Source: BFI

Notes:

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 after 2008.

Numbers have been revised on the basis of new information received since publication of the 2015 Statistical Yearbook.

Inward investment feature films include inward co-productions and VFX-only films.

Measurement:

The above numbers include only the UK spend associated with productions shot or post-produced partly or wholly 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.

Table 1 distinguishes UK independent films from UK/USA studio films and non-UK films made partly or wholly in the UK. In 2015, UK independent films accounted for 22% of the production spend in the UK, a fall from 33% in 2014.

Table 1 Value of UK spend of UK/USA studio and UK independent films, 2006-2015, £ million

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
UK/USA studio films	588	566	407	772	983	1,007	667	778	1,003	889
UK independent films	234	265	292	296	289	279	326	390	491	308
Non-UK films	15	18	24	48	22	41	19	4	3	213
Total	**837**	**849**	**723**	**1,115**	**1,295**	**1,327**	**1,012**	**1,172**	**1,497**	**1,410**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
See notes to Figure 1.

THE VOLUME OF UK FILM PRODUCTION

As Figure 2 shows, the number of films produced in the UK grew from 209 in 2006 to a peak of 376 in 2010. From 2008 onwards, the data collected include feature films with budgets of less than £500,000 which partially explains the increase. (Prior to 2008 the collection of data on films at this budget level was not comprehensive.) The number of co-productions fell from 2007, reflecting a tightening in co-production certification requirements, followed by the introduction of the new 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.

In 2015, 201 films were produced wholly or in part in the UK, down from 310 in 2014. Of these, 30 were co-productions, 124 were domestic UK features (of which 64 had budgets of under £500,000) and 47 were inward investment films. The biggest fall was in domestic UK features with budgets of under £500,000, which were down from 147 in 2014. However, there is often a delay in acquiring full data on low and micro-budget feature film activity in the UK, and the numbers for the last two years are likely to be revised upwards.

Figure 2 Number of feature films produced in the UK, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Inward investment	29	34	32	37	31	37	44	44	49	47
Domestic UK	127	174	233	259	307	279	280	245	224	124
Of which budget ≥ £500,000	55	69	81	86	72	88	76	67	77	60
Of which budget < £500,000	72	105	152	173	235	191	204	178	147	64
Co-production	53	33	30	38	38	47	46	58	37	30
Of which majority and parity co-production	15	15	14	13	25	24	24	32	17	15
Of which minority co-production	38	18	16	25	13	23	22	26	20	15
Total	**209**	**241**	**295**	**334**	**376**	**363**	**370**	**347**	**310**	**201**

Source: BFI RSU
Notes:
Inward investment includes inward investment co-productions and, from 2007, a small number of visual effects (VFX) only titles.
Data for 2006-2014 updated since publication of the 2015 Statistical Yearbook.
Includes both official and unofficial co-productions.
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.

A total of 17 UK/USA studio films were produced wholly or in part in the UK in 2015 (Table 2). These few films accounted for the majority of UK production spend. UK independent films made up almost 88% of all films produced in the UK, a decrease of five percentage points when compared to 2014. Although the number of independent films (176) looks lower than for other recent years, due to the delay in acquiring full data on low and micro-budget feature film activity, this figure is likely to be revised upwards over time.

Table 2 Numbers of UK/USA studio and independent films, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
UK/USA studio films	21	17	13	14	16	13	16	17	18	17
UK independent films	181	212	266	295	352	331	345	324	287	176
Non-UK films	7	12	16	25	8	19	9	6	5	8
Total	**209**	**241**	**295**	**334**	**376**	**363**	**370**	**347**	**310**	**201**

Source: BFI
Note: Data for 2006-2014 updated since publication of the 2015 Statistical Yearbook.

FILM PRODUCTIONS BY GENRE, 2013-2015

Table 3 and Figure 3 show a breakdown of production by genre for the years 2013-2015. The drama and documentary genres accounted for the highest proportion of films, at 16% and 21% respectively, but only 9% and 1% of total UK spend. These were followed by comedy and thriller which each accounted for 14% of productions, and 8% and 7% of respective UK spend. The biggest spending genre was action, which accounted for 37% of the overall UK spend, but only 7% of films.

Table 3 Genre of film production in the UK, 2013-2015 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	63	7.3	2,608.8	39.6	1,494.7	36.6
Adventure	18	2.1	956.0	14.5	519.7	12.7
Drama	134	15.6	581.6	8.8	360.5	8.8
Fantasy	11	1.3	474.5	7.2	360.1	8.8
Comedy	117	13.6	435.1	6.6	327.3	8.0
Thriller	120	14.0	359.1	5.5	277.4	6.8
Sci-fi	21	2.4	251.0	3.8	166.8	4.1
Horror	69	8.0	178.0	2.7	141.9	3.5
Biopic	21	2.4	126.5	1.9	80.8	2.0
Romance	29	3.4	149.9	2.3	80.6	2.0
War	13	1.5	130.6	2.0	70.1	1.7
Documentary	183	21.3	82.8	1.3	53.5	1.3
Family	8	0.9	118.6	1.8	39.7	1.0
Crime	36	4.2	26.2	0.4	22.3	0.5
Mystery	5	0.6	12.9	0.2	9.4	0.2
Other	10	1.2	96.7	0.1	74.1	0.1
Total	**858**	**100.0**	**6,588.2**	**100.0**	**4,078.9**	**100.0**

Source: BFI
Notes:
The genre 'Other' includes 'Animation', 'Musical' and 'Western'.
The data have been presented for a three-year period to show as many genres as possible without disclosing the budgets of individual films.
Figures/percentages may not sum to totals due to rounding.

Figure 3 Genre of UK film productions 2013-2015 (number of films)

Genre	%
Documentary	21.5
Drama	15.7
Thriller	14.2
Comedy	13.5
Horror	8.1
Action	7.4
Crime	4.3
Romance	3.2
Sci-fi	2.5
Biopic	2.4
Adventure	1.9
War	1.5
Fantasy	1.3
Other	2.5

Source: BFI
Notes:
The data differ from those in Table 3 as they do not include non-UK films.
The genre 'Other' includes 'Animation', 'Family', 'Musical', 'Mystery' and 'Western'.

Looking at the breakdown by genre of UK independent films alone over the three-year period (Table 4), the pattern was fairly similar. The main differences were that comedy, thriller, drama and biopic accounted for a much greater proportion of total UK spend than for all films produced in the UK (53% compared with 26%), and action and adventure accounted for a lower proportion (24% compared with 49%).

Table 4 Independent UK productions by genre 2013-2015 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	46	5.8	395.4	22.5	256.4	21.6
Comedy	108	13.7	292.5	16.6	237.6	20.0
Thriller	117	14.9	228.5	13.0	168.1	14.2
Drama	129	16.4	234.6	13.4	162.3	13.7
Biopic	19	2.4	94.6	5.4	63.9	5.4
Romance	25	3.2	87.7	5.0	52.0	4.4
Documentary	178	22.6	68.2	3.9	47.8	4.0
Horror	64	8.1	46.1	2.6	33.1	2.8
Sci-fi	19	2.4	32.5	1.9	25.9	2.2
Adventure	9	1.1	95.1	5.4	23.1	1.9
Crime	36	4.6	26.2	1.5	22.3	1.9
Fantasy	7	0.9	46.3	2.6	22.1	1.9
War	11	1.4	36.6	2.1	18.1	1.5
Other	19	2.4	72.8	4.1	55.5	4.7
Total	**787**	**100.0**	**1,757.1**	**100.0**	**1,188.1**	**100.0**

Source: BFI
Notes:
The genre 'Other' includes the genres 'Musical', 'Animation', 'Family' and 'Mystery'.
Figures/percentages may not sum to totals due to rounding.

BUDGET TRENDS

The median budget of domestic UK features in 2015 was £500,000, an increase from £260,000 in 2014 (Table 5). It should be noted that the 2015 median is likely to be revised downwards, due to the delay in acquiring budget data for low and micro-budget productions.

The median budget for inward investment features was £13.1 million, up from £12.6 million in 2014, while for co-productions the median budget decreased from £1.4 million to £1.3 million. Again, the figures for 2015 are likely to be revised.

Table 5 Median feature film budgets, £ million, 2009-2015

Production category	2009	2010	2011	2012	2013	2014	2015
Inward investment	18.45	13.09	17.64	1.58	11.24	12.61	13.10
Domestic UK	0.20	0.13	0.17	0.15	0.15	0.26	0.50
Co-production	1.35	2.56	1.10	1.05	1.01	1.40	1.27

Source: BFI
Notes:
Median budget is the middle value of budgets when ordered lowest to highest (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 mean, as it avoids the upward skew of a small number of high budget productions.
Includes films with budgets of less than £500,000.
Data for 2010-2014 updated since publication of the 2015 Statistical Yearbook.
Data in this table are shown to two decimal places to gain a clearer picture of change over the time period for domestic UK films.

SIZE DISTRIBUTION OF BUDGETS

The budget size distribution for the three main categories of films made in 2015 is shown in Tables 6 to 8.

For inward investment features, the 14 films with budgets of £30 million or over (30% of all inward features) accounted for 85% of the total budget for this category (Table 6). There were 15 inward features with budgets of less than £5 million (32% of inward features), which accounted for 2% of the total budget for these films.

Table 6 Size distribution of budgets, inward investment features, 2015

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£30 million	14	1,689.2	85.4
£10 - £29.9 million	12	208.8	10.6
£5 - £9.9 million	6	42.4	2.1
<£5 million	15	37.7	1.9
Total	**47**	**1,978.2**	**100.0**

Source: BFI

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

Over half of domestic UK features (64) had budgets of under £500,000, and only 14 productions (11% of domestic UK projects) had budgets of £5 million or over (Table 7). The domestic UK features in the highest budget band accounted for 59% of this category's aggregate budget, while those in the lowest budget band accounted for 6%. These figures show no substantial change on 2014.

Table 7 Size distribution of budgets, domestic UK features, 2015

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	14	133.4	58.9
£2 - £4.9 million	17	51.0	22.5
£0.5 - £1.9 million	29	28.4	12.5
<£0.5 million	64	13.7	6.1
Total	**124**	**226.5**	**100.0**

Source: BFI

Seven of the 30 co-productions produced in the UK in 2015 had budgets of £5 million or over, accounting for 69% of the total budget in this category (Table 8). The nine co-productions with budgets of under £500,000 accounted for 3% of the total budget.

Table 8 Size distribution of budgets, co-productions, 2015

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	7	61.7	68.7
£2 - £4.9 million	5	16.4	18.3
£0.5 - £1.9 million	9	9.2	10.2
<£0.5 million	9	2.5	2.8
Total	**30**	**89.8**	**100.0**

Source: BFI

BIG BUDGET PRODUCTIONS, 2009-2015

The importance to UK spend of a small number of big budget productions – usually inward investment films – is demonstrated in Table 9. In 2015, the 15 films with budgets of £30 million or over accounted for 73% of UK production spend, the same as in 2014. All except one of these films were inward investment features.

Table 9 Big budget films' contribution to UK spend, 2009-2015

	2009	2010	2011	2012	2013	2014	2015
Number of films with budgets ≥£30 million	16	13	17	9	16	18	15
Value of associated UK spend (£ million)	748.9	960.6	1,009.8	631.9	824.7	1,099.5	1,035.6
Total UK spend (£ million)	1,115.4	1,294.7	1,326.8	1,012.3	1,171.5	1,497.4	1,410.1
Big budget film % of UK spend	**67.1**	**74.2**	**76.1**	**62.4**	**70.4**	**73.4**	**73.4**

Source: BFI
Note: Data for 2010-2014 updated since publication of the 2015 Statistical Yearbook.

UK SPEND AS PERCENTAGE OF TOTAL PRODUCTION BUDGET

Table 10 shows UK spend as a percentage of the total production budget for inward investment, domestic UK and co-production films. UK domestic films had the highest proportion of UK spend in 2015 (87%), followed by inward investment films at 60%. Co-productions had the lowest percentage of UK spend (39%).

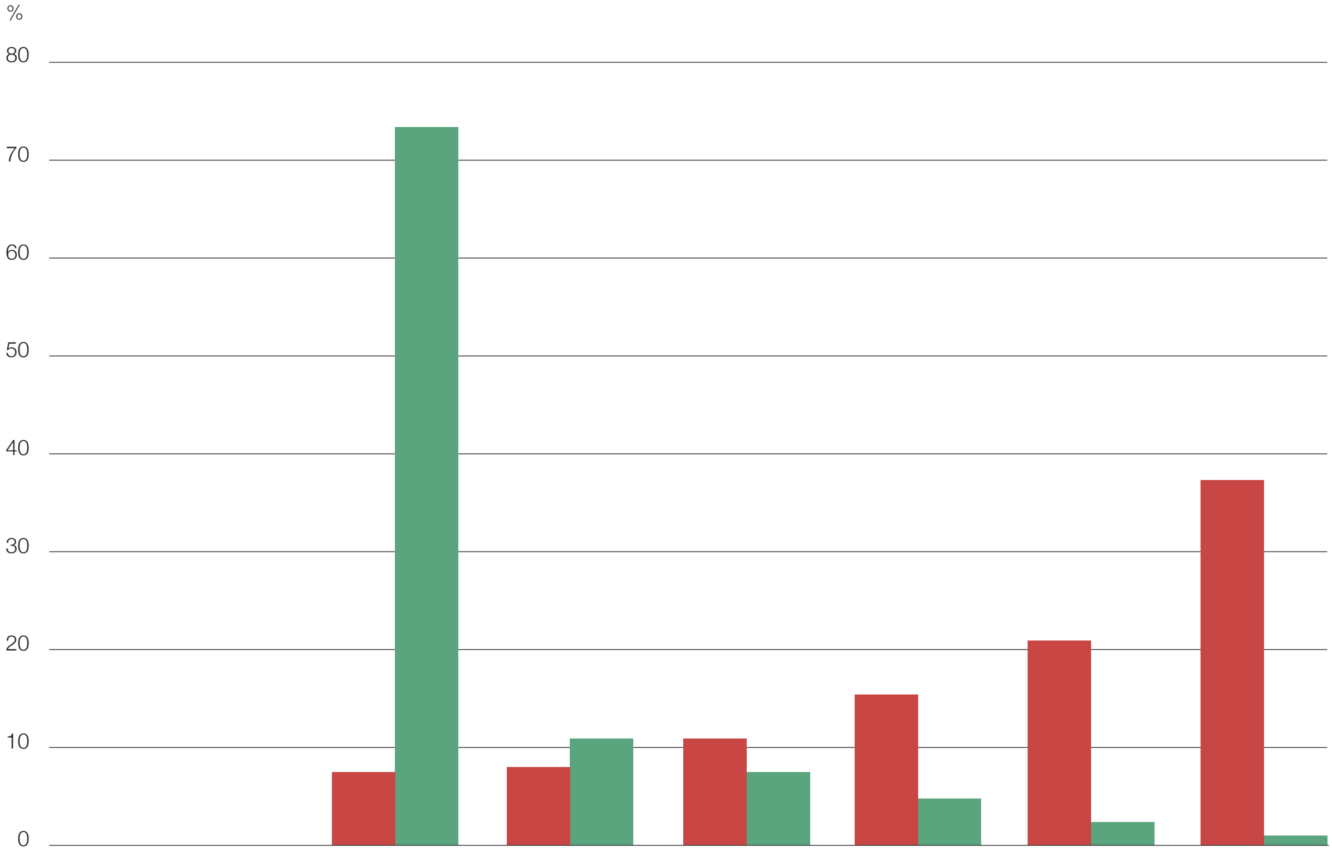
Table 10 UK spend as percentage of total production budget, 2009-2015

Production category	2009	2010	2011	2012	2013	2014	2015
Inward investment	50.9	71.7	55.9	70.3	67.1	57.0	59.5
Domestic UK	81.4	89.9	86.6	88.9	86.7	78.6	87.4
Co-production	37.2	42.1	36.0	46.0	43.8	37.4	39.2

Source: BFI
Note: Data for 2010-2014 updated since publication of the 2015 Statistical Yearbook.

Figure 4 underlines that a small proportion (8%) of titles with a UK spend of £30 million or over are responsible for the majority (73%) of UK production spend. Conversely, 37% of films have a UK spend of less than £500,000, but they represent just 1% of production investment in the UK.

Figure 4 Percentage of productions and UK spend by category of UK spend, 2015



	≥£30 million	£10 - £29.9 million	£5 - £9.9 million	£2 - £4.9 million	£0.5 - £1.9 million	<£0.5 million
% of productions	7.5	8.0	10.9	15.4	20.9	37.3
% of UK spend	73.4	10.9	7.5	4.8	2.4	1.0

Source: BFI

DOMESTIC UK PRODUCTIONS BY TERRITORY OF SHOOT

Table 11 analyses domestic UK productions in 2015 according to whether they were wholly shot in the UK, or shot partly or wholly abroad. The majority (82 out of 124) were shot exclusively in the UK, while 42 films were shot partly or wholly outside the UK. The non-UK spend of domestic productions in 2015 as a proportion of their total budget was 13%.

Table 11 Domestic UK productions by territory of shoot, 2015

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	82	143.5	1.1	0.8
UK and other / wholly outside the UK	42	83.0	27.5	33.1
Total domestic UK productions	**124**	**226.5**	**28.6**	**12.6**

Source: BFI

Table 12 shows the number of shoots by territory for domestic UK films in 2015. Because some films were shot in two or more territories, the total number of shoots is greater than the total number of films. There were 13 shoots in the USA, five in France, four in Spain and three in Republic of Ireland.

Table 12 Domestic UK productions, shoots by territory or region, 2015

Territory of shoot	Number of shoots
UK	113
USA	13
France	5
Spain	4
Republic of Ireland	3
Germany	2
Other	30
Total	**170**

Source: BFI

CO-PRODUCTIONS BY TERRITORY OF SHOOT

In contrast to domestic UK films, co-productions beginning principal photography in 2015 were usually shot partly or wholly abroad, as Table 13 shows; only five out of 30 films were shot wholly in the UK.

Table 13 Co-productions by territory of shoot, 2015

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	5	6.8	1.3	19.6
UK and other	11	33.6	14.8	43.9
Wholly outside the UK	14	49.3	38.5	78.0
Total co-productions	**30**	**89.8**	**54.6**	**60.8**

Source: BFI
Notes:
Includes both official and unofficial co-productions.
Figures/percentages may not sum to totals due to rounding.

The country distribution of co-production shoots is shown in Table 14. As most co-productions were shot in two or more territories, the total number of shoots was greater than the total number of films. The majority of shoots were in the UK or elsewhere in Europe. Three shoots took place in the USA, and there were two each in Germany, Republic of Ireland, the Occupied Palestinian Territories and Romania.

Table 14 Co-productions, shoots by territory or region, 2015

UK	16
USA	3
Germany	2
Republic of Ireland	2
Occupied Palestinian Territories	2
Romania	2
Other Europe	13
Other	13
Total	**53**

Source: BFI

PRODUCTION COMPANY ACTIVITY LEVELS

UK film production in 2015 was dispersed among a large number of production companies, as shown in Table 15. The BFI Research and Statistics Unit recorded 368 production companies associated with films shot in the UK or co-productions involving the UK in the year, a decrease from 391 in 2014. Of these, 347 (94%) were associated with a single feature. These were a mixture of distinct production companies and special purpose vehicles set up to make a single film.

Table 15 Film production company activity, 2015

Number of features per company	Number of companies
3	4
2	17
1	347
Total	**368**

Source: BFI RSU

Note: Includes all production categories.

THE VALUE OF HIGH-END TELEVISION PRODUCTION

Table 16 shows that the total UK production spend for UK qualifiying high-end television (HETV) programmes in 2015 was £759 million. Co-productions and inward investment projects contributed £379 million, an increase from £302 million in 2014, while domestic UK HETV productions contributed £380 milllion, up from £331 million in 2014. Domestic HETV projects were responsible for just over half the HETV UK production spend in 2015, in contrast with feature film where the majority (83%) of UK production spend was associated with inward investment projects.

Domestic HETV productions shooting in the UK in 2015 included *Call the Midwife – Series 5* (8 episodes, plus Christmas special), *Dickensian* (20 episodes) and *Shetland – Series 3* (6 episodes), inward investment productions included *Game of Thrones – Season 6* (10 episodes), *Outlander – Season 2* (13 episodes) and *Galavant – Season 2* (10 episodes), while co-productions included *Downton Abbey – Series 6* (8 episodes), *The Night Manager* (6 episodes) and *War and Peace* (6 episodes).

Table 16 UK spend and number of HETV productions* produced in the UK, 2014 and 2015

	2014		2015	
	UK spend (£ million)	Number	UK spend (£ million)	Number
Co-production and inward investment	302.4	30	378.6	25
Domestic UK	330.9	63	380.2	57
Total	**633.2**	**93**	**758.8**	**82**

Source: BFI

Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.

Productions are allocated to the year principal photography commenced.

Data for 2014 updated since publication of the 2015 Statistical Yearbook.

* An HETV production can be a single programme or a television series.

GENRE OF HIGH-END TELEVISION PRODUCTIONS

Table 17 shows a breakdown of qualifying HETV productions by genre. The most common genre was drama, accounting for 25 productions (31% of the total) and £265 million (35%) of UK spend. The second was crime, accounting for 21 productions and 18% of the total UK spend.

Table 17 Genre of qualifying HETV productions*, 2015

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	25	30.5	302.1	35.0	265.0	34.9
Crime	21	25.6	157.1	18.2	138.5	18.3
Comedy	14	17.1	117.9	13.7	93.5	12.3
Thriller	5	6.1	37.9	4.4	37.9	5.0
Other	17	20.7	247.6	28.7	223.7	29.5
Total	**82**	**100.0**	**862.6**	**100.0**	**758.8**	**100.0**

Source: BFI

Notes:

The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.

Figures may not sum to totals due to rounding.

* An HETV production can be a single programme or a television series.

THE VALUE OF ANIMATION PRODUCTION

Table 18 shows that the total UK spend of the 18 qualifying animation programmes produced in the UK in 2015 was £29 million. UK spend on domestic UK productions accounted for 36% of the total spend.

Table 18 UK spend and number of animation programmes* produced in the UK, 2015

Production category	UK spend (£ million)	Number of productions
Co-production and inward investment	18.7	10
Domestic UK	10.5	8
Total	**29.2**	**18**

Source: BFI
Notes:
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
* An animation production can be a single programme or a television series.

THE VALUE OF VIDEO GAMES PRODUCTION

In April 2014, the UK government extended the coverage of creative sector tax reliefs to include video games production. In 2015, the total UK spend of the 25 qualifying video games produced in the UK was £59.5 million. More comprehensive data covering video games production will be available in future editions of the Yearbook.

CHAPTER 18

SCREEN SECTOR PRODUCTIONS CERTIFIED AS BRITISH, 2006-2015

Image: *Brooklyn* courtesy of Lionsgate Films

SCREEN SECTOR PRODUCTIONS CERTIFIED AS BRITISH, 2006-2015

In 2015, over 450 productions with a total value of £2.3 billion were certified as British under the screen sector cultural tests. An additional 15 films (£85 million) were certified under the UK's co-production treaties. For the first time, 15 children's television programmes received interim certification.

FACTS IN FOCUS

- A total of 253 UK films (254 in 2014) received final certification as British in 2015. Of these, 238 were films which passed the cultural test and 15 were official co-productions.
- The combined production budget of finally certified cultural test films was £1,445 million (£1,856 million in 2014); the combined budget of finally certified co-productions was £85 million (£68 million in 2014).
- Twenty-one cultural test films had budgets of over £10 million, down from 25 in 2014.
- In 2015, the median budget for cultural test films was £0.4 million; the median budget for co-productions was £3.8 million.
- In 2015, 58 high-end television programmes received final certification as British under the cultural test, with a combined budget of £465 million, and 51 animation programmes received final certification under the cultural test, with a budget of £86 million.
- Fifteen children's television programmes received interim approval under the cultural test, with a total budget of £18 million.
- In 2015, 116 video games received final certification, with a budget of £266 million.

QUALIFYING AS AN OFFICIAL BRITISH PRODUCTION

FILM

To access the UK film tax relief or be eligible for other public support, a film must be certified as British. To qualify as British, a film must pass the cultural test for film (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 cultural test has been in place since 2007, but was revised in 2014 to bring it in line with the more recent creative sector cultural tests. Before 2007, films which were not certified as co-productions had to pass a production costs test to be certified as British.

The Secretary of State for Culture, Media and Sport is responsible for approving the issuing of final certificates on the basis of recommendations made by the BFI Certification Unit. An 'interim approval' may be granted before completion to a production which meets the certification criteria, and 'final certification' is awarded once the production has been completed and final documents submitted.

To qualify as British under the revised cultural test, films have to receive a requisite number of points based on UK or European Economic Area (EEA) cultural elements for content, contribution, hubs and practitioners. A wide range of films qualified as British under the cultural test in 2015, including *Dark Horse*, *Shaun the Sheep the Movie*, *SPECTRE* and *Under Milk Wood*.

To qualify as British under one of the UK's official co-production agreements, films must be jointly certified by the competent authorities in each co-producing country. Each party co-producer is required to meet the criteria of the specific co-production agreement, which includes the creative, technical, artistic 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 in that territory. British films certified as official co-productions are not required to pass the cultural test.

At the end of 2015, the UK had 11 active bilateral treaties in place, with Australia, Canada, China, France, India, Israel, Jamaica, Morocco, New Zealand, the Occupied Palestinian Territories and South Africa. An agreement with Brazil was signed in 2012, but is still subject to constitutional procedures and ratification before it can come into force. Official UK co-productions can also be certified under the European Convention on Cinematographic Co-production which allows for both bilateral and multilateral film co-productions. Films which received final co-production certification in 2015 include *Brooklyn, The Lobster* and *Queen and Country.*

HIGH-END TELEVISION, ANIMATION TELEVISION OR CHILDREN'S TELEVISION PROGRAMME

In 2013, the UK government introduced tax reliefs for high-end television (HETV) and animation television programmes with the aim of boosting production investment in these creative sectors. (The cultural test for HETV programmes was revised in 2015.) Tax relief for children's television programmes was introduced in April 2015. To qualify as an official British HETV, animation television or children's television programme, projects must pass either the relevant cultural test (under Part 15A of the Corporation Tax Act 2009, as amended) or be certified as an official co-production under one of the UK's bilateral co-production agreements which allow television co-production. At the end of 2015, these were with Australia, Canada, Israel, New Zealand and the Occupied Palestinian Territories.

HETV projects receiving final certification under the cultural test in 2015 include *The Casual Vacancy, Outlander – Series 1* and *Poldark*; finally certified cultural test animation projects include *Legends of Chima – Season 2, Llan-ar-goll-en – Series 2* and *Morph*.

VIDEO GAME

In 2014, the UK government extended creative sector tax reliefs to include video games development. As with the other screen sector reliefs, to qualify as officially British a video game must pass the relevant cultural test (under Schedules 17 and 18 of the Finance Act 2013). Official co-production treaties do not apply to the video games sector. Video game projects receiving final certification in 2015 include *Monopoly Dash, Grand Theft Auto V* and *Toybox Turbos*.

FILM CULTURAL TEST CERTIFICATIONS, 2014 AND 2015

In 2015, a total of 238 films received final certification as British under the cultural test, one fewer than in 2014 (Table 1). The combined budget of certified films in 2015 was £1,445 million, a substantial decrease from the £1,856 million seen in 2014 when a number of very high budget inward investment features were shot in the UK. The number of film projects gaining interim approval under the cultural test was higher in 2015 compared with 2014, rising from 166 to 264, and the anticipated total production value increased from £1,721 million to £2,793 million.

Table 1 Film cultural test certifications, 2014 and 2015

Type of certification	2014		2015	
	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	166	1,721.4	264	2,792.8
Final certification	239	1,856.1	238	1,444.9

Source: DCMS, BFI
Note: The figures for 2014 have been revised since publication of the 2015 Statistical Yearbook.

FILM CO-PRODUCTION CERTIFICATIONS, 2014 AND 2015

The number of co-production film projects awarded final certification in 2015 was the same as in 2014, at 15, whereas interim approvals increased from 16 films to 22 (Table 2). The total budget for final certifications was higher in 2015, but the budget for interim approvals remained at a similar level. The combined budget for final certifications in 2015 was £85 million compared with £68 million in 2014; the anticipated production value of interim approvals was £71 million in both years.

Table 2 Film co-production certifications, 2014 and 2015

Type of certification	2014		2015	
	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	16	71.2	22	71.2
Final certification	15	68.2	15	84.6

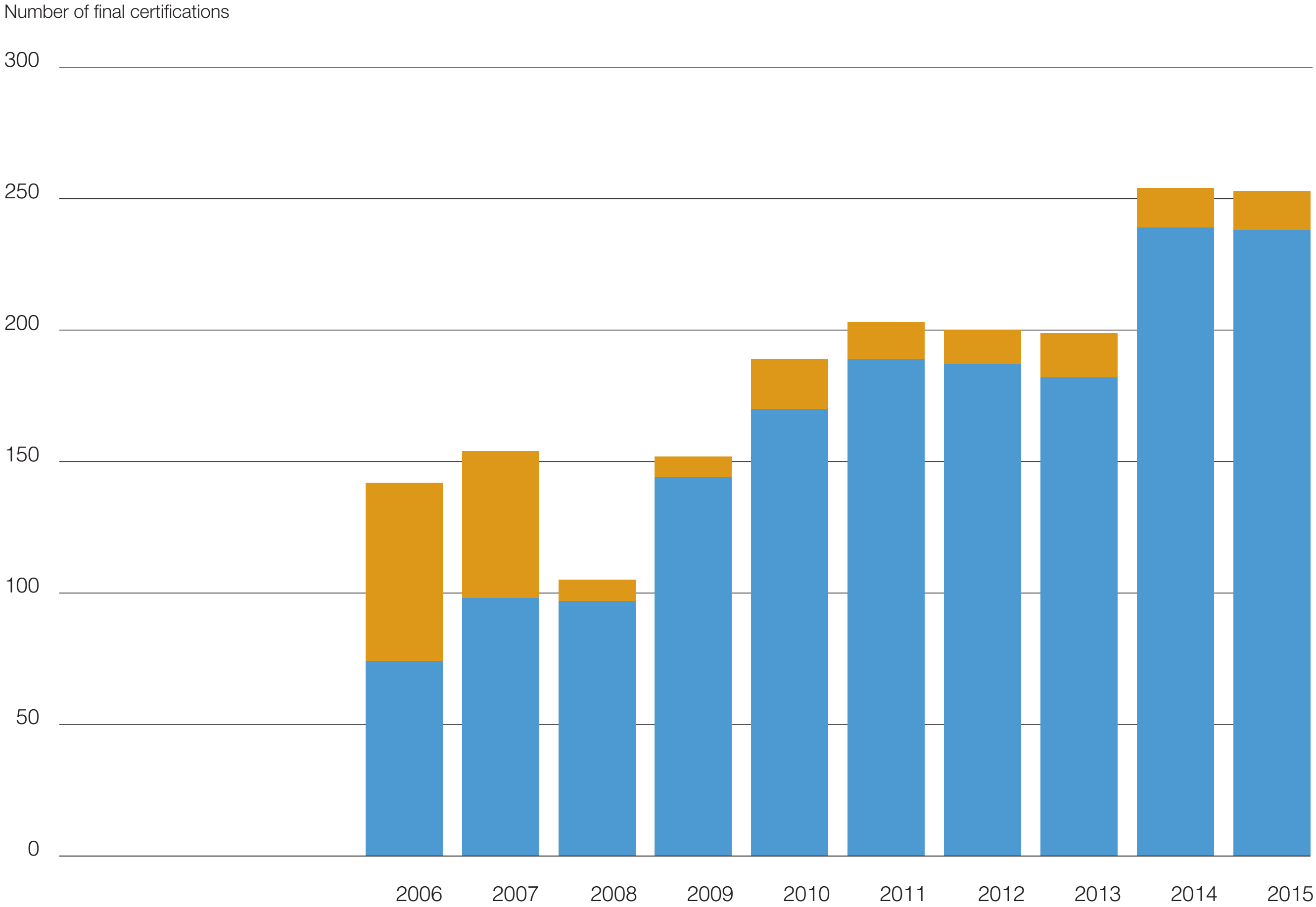
Source: DCMS, BFI

Ten of the 15 final co-production certifications were under the European Convention on Cinematic Co-production in 2015. The remaining co-productions were under the UK-Australia, UK-Canada, UK-New Zealand and UK-South Africa agreements. Of the 22 interim co-production certifications, 17 were under the European Convention and the remaining co-productions were under the UK-Australia, UK-Canada, UK-China, UK-New Zealand and UK-South Africa agreements. (It is possible for a film to use more than one treaty and a small number of films in 2015 used additional treaties to obtain benefits from countries outside of those with which the UK has formal agreements.)

FILMS WITH FINAL CERTIFICATION, 2006-2015

Due in part to a competitive tax regime, the number of UK films (cultural test/production costs test and co-productions) receiving final certification has risen sharply in the last few years. Figure 1 shows that there were record numbers of certifications in 2014 (254) and 2015 (253).

Figure 1 Number of films with final certification, 2006-2015

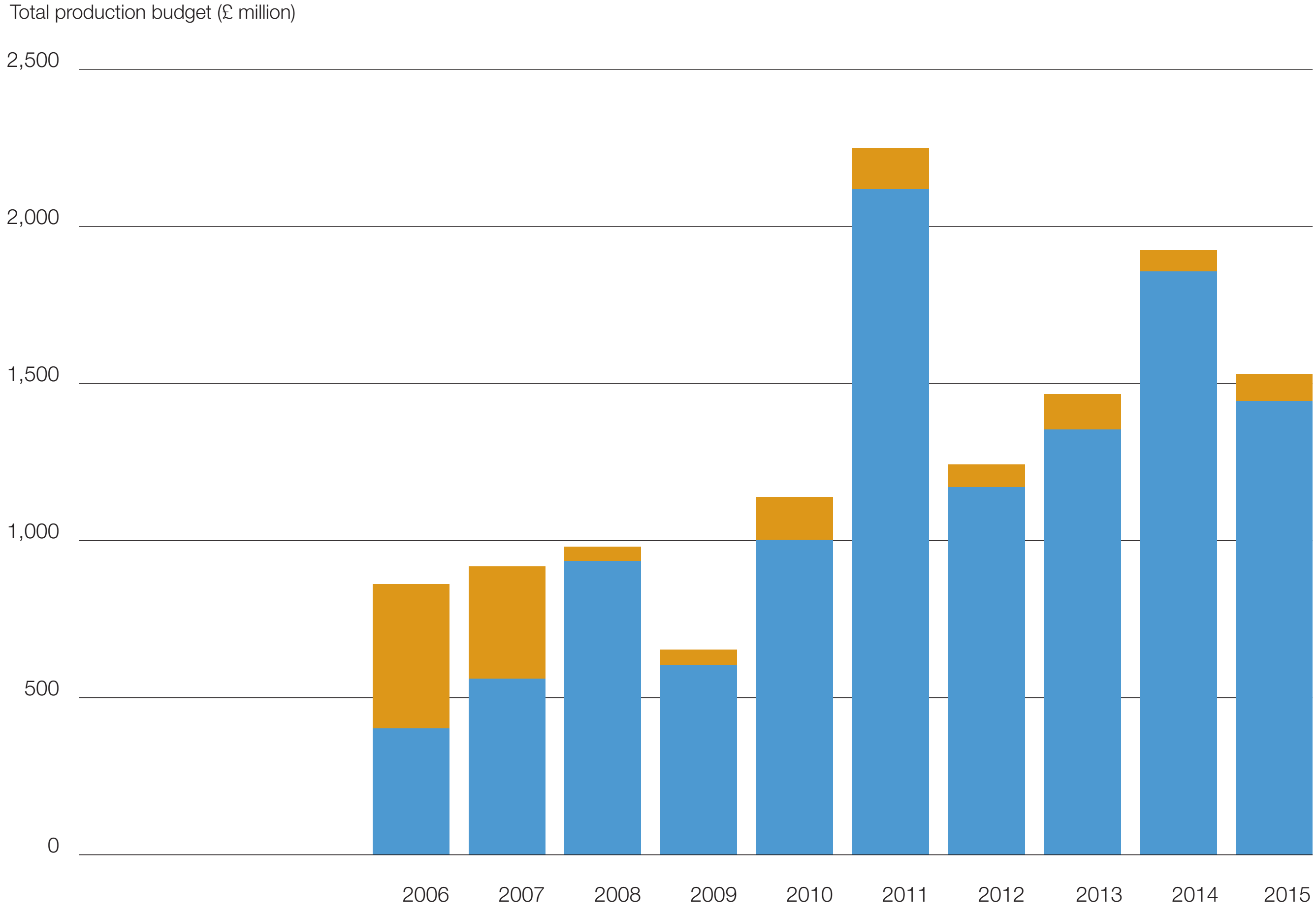


	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cultural test/production costs test	74	98	97	144	170	189	187	182	239	238
Co-production	68	56	8	8	19	14	13	17	15	15
Total	**142**	**154**	**105**	**152**	**189**	**203**	**200**	**199**	**254**	**253**

Source: DCMS, BFI

The total production budget of British films receiving final certification in 2015, at £1,529 million, was lower than in 2014 (£1,924 million) but was the third highest of the 10-year period 2006-2015 (Figure 2). As the chart shows, the share of overall production budget associated with co-productions fell dramatically after 2007 when the incentive to structure films via this mechanism was reduced by the new tax relief. The decline in the value of co-productions has been compensated by an increase in the production value of cultural test films and, since 2009, there has been an upward trend in the overall production budget. In 2015, cultural test films accounted for 95% of the total budget.

Figure 2 Total production budget of films with final certification, 2006-2015

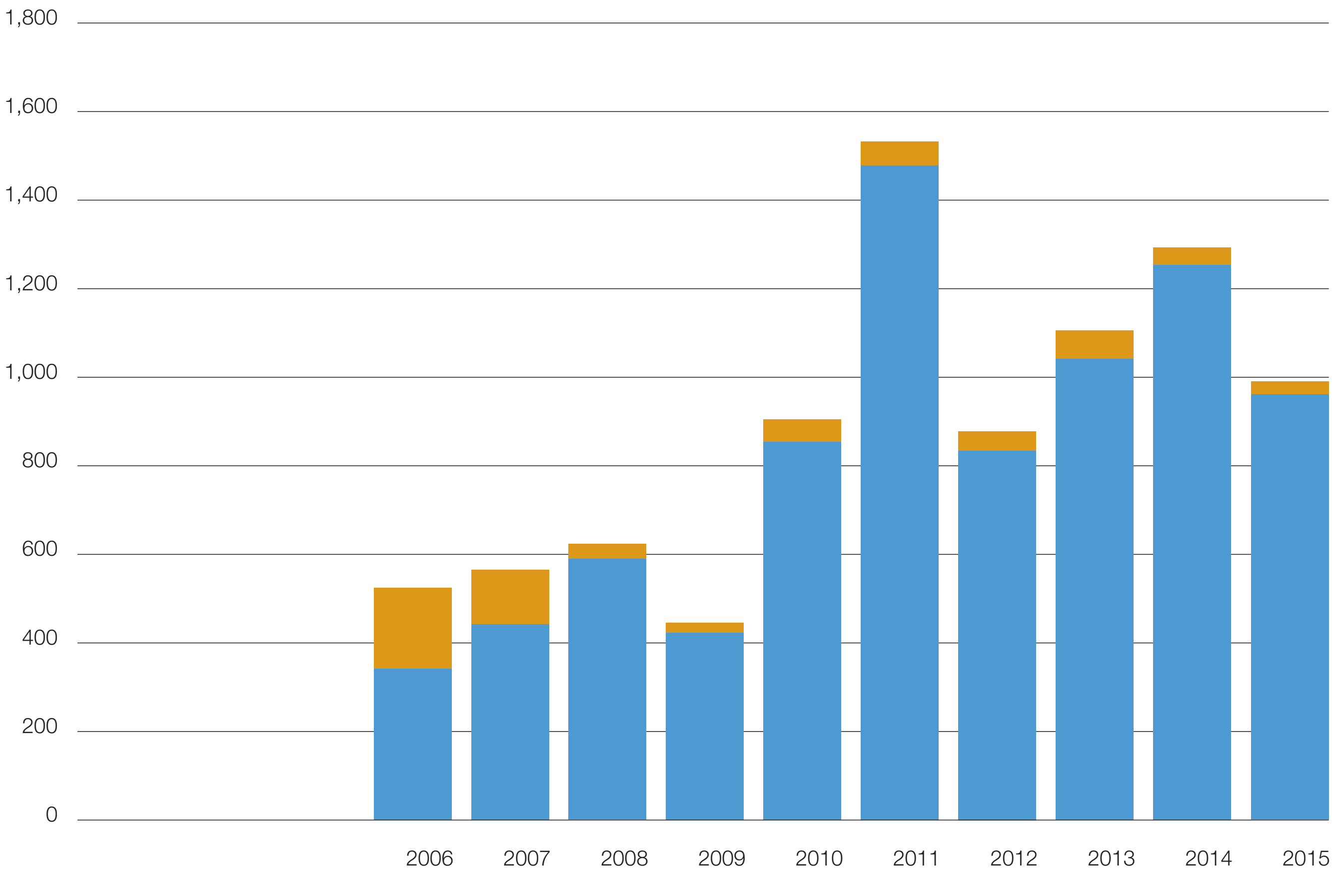


	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cultural test/production costs test	402	561	935	605	1,002	2,118	1,170	1,353	1,856	1,445
Co-production	460	357	45	48	137	131	73	113	68	85
Total	**862**	**918**	**980**	**653**	**1,139**	**2,250**	**1,243**	**1,466**	**1,924**	**1,529**

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/production costs test films and total investment for co-productions.
Figures may not sum to totals due to rounding.

Figure 3 shows the levels of UK spend between 2006 and 2015. UK spend is generally that part of the production budget expended in the UK (see notes to Figure 3). (Although the latest cultural test amendments allow wider European Economic Area cultural elements for content to be taken into account when a film is applying for certification as British, tax relief is only awarded on expenditure which is used or consumed in the UK.) In line with the overall production budget, UK spend in 2015, at £990 million, was lower than in 2014 (£1,253 million). However, since 2006 there has been a general upward trend in the amount of UK spend with two peak years, 2011 and 2014. The aggregate UK spend of co-productions has always been less than that of cultural test/production costs test films. In 2015, cultural test films accounted for 97% of the overall UK spend of films with final certification.

Figure 3 UK spend of films with final certification, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cultural test/production costs test	341	442	589	423	854	1,478	834	1,041	1,253	960
Co-production	183	123	34	22	51	55	44	65	40	30
Total	**524**	**566**	**623**	**445**	**905**	**1,533**	**878**	**1,106**	**1,293**	**990**

Source: DCMS, BFI
Notes:
'UK spend' is the 'value of the production activities in the UK' for cultural test/production costs 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 a production category's total budget is typically lower for co-productions than for cultural test/production costs test films (Table 3). In 2006-2015, the co-production UK spend share has varied, being as high as 75% in 2008 and as low as 35% in both 2007 and 2015. The variation in the annual UK spend share of cultural test/production costs test films has been less wide, ranging from 63% to 85%. In 2015, the UK spend share of cultural test films was 66%, the second lowest in the period.

Table 3 UK spend as % of total production budget, 2006-2015

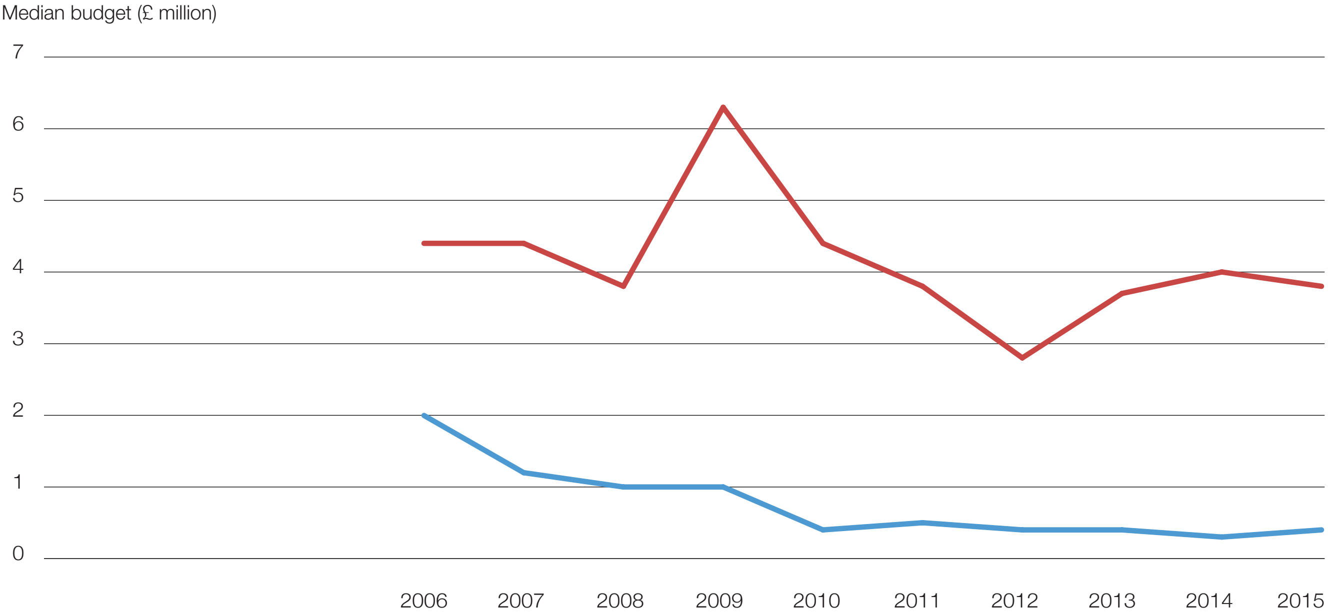
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cultural test/production costs test	85	79	63	70	85	70	71	77	68	66
Co-production	40	35	75	45	37	42	60	58	59	35
Total	**61**	**62**	**64**	**68**	**80**	**68**	**71**	**76**	**67**	**65**

Source: BFI

BUDGET DISTRIBUTION OF FILMS WITH FINAL CERTIFICATION, 2006-2015

Median budgets for films receiving final certification between 2006 and 2015 are shown in Figure 4. The median budget for both production categories has decreased during the period, albeit at different rates. The median co-production budget fell from £4.4 million to £3.8 million, with a peak in 2009 at £6.3 million. The peak is likely to be due in part to the very low numbers of films certified in that year, because with low numbers the median is more susceptible to the effects of individual budgets. At the start of the period, the median budget of cultural test/production costs test films was £2 million. Since then, as the number of these films has increased, the median budget has fallen steeply, plateauing at around £0.4 million from 2010.

Figure 4 Median budgets of films with final certification, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cultural test/production costs test*	2.0	1.2	1.0	1.0	0.4	0.5	0.4	0.4	0.3	0.4
Co-production	4.4	4.4	3.8	6.3	4.4	3.8	2.8	3.7	4.0	3.8

Source: BFI

Notes:

The median is the middle value, ie there are equal numbers of films above and below the median.

* The production costs test for qualification as a British film was replaced by the cultural test in 2007.

Table 4 shows that one reason for the decrease in the median budget for cultural test/production costs test films is the growth in the number of low budget (under £2 million) productions being awarded final certification. This growth suggests that UK tax relief has become more accessible to low budget filmmakers following the introduction of new rules in 2007. At the same time, the total number of high budget (over £10 million) films with final certification has increased over the time period and was highest in 2014 and 2015. Throughout the period there were generally around 10 to 15 such films per year, but there were 25 in 2014 and 21 in 2015. These figures may, in part, be due to the recent changes to qualifying spend thresholds in the tax relief rules.

Table 4 Final cultural test/production costs test certifications by budget band, 2006-2015

Budget band (£ million)	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
≥30	2	3	9	4	6	13	9	9	16	9
10 - 29.9	7	7	6	7	9	7	5	7	9	12
5 - 9.9	9	9	11	8	10	15	7	12	22	10
2 - 4.9	21	18	9	24	16	20	21	22	15	17
0.5 - 1.9	23	36	24	49	41	40	44	39	43	63
<0.5	12	25	38	52	88	94	101	93	135	127
Total	**74**	**98**	**97**	**144**	**170**	**189**	**187**	**182**	**240**	**238**

Source: DCMS, BFI

Table 5 shows the distribution of budgets by budget band for films certified under the cultural test in the years 2006 to 2015. The 5% of films with budgets of £30 million or over accounted for 73% of the aggregate budget, while the 72% of films with budgets of 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 5 Final cultural test certifications, budget distribution by budget band, 2006-2015

Budget band (£ million)	Number	% number	Total budget (£ million)	% budget
≥30	80	4.9	8,338	72.8
10 - 29.9	76	4.7	1,188	10.4
5 - 9.9	113	7.0	810	7.1
2 - 4.9	183	11.3	572	5.0
0.5 - 1.9	405	25.0	409	3.6
<0.5	761	47.0	131	1.1
Total	**1,618**	**100.0**	**11,447**	**100.0**

Source: DCMS, BFI
Note: Figures/percentages may not sum to totals due to rounding.

For co-productions the pattern is different. The number of films in each budget band has been low since the introduction of the cultural test in 2007 but in most years a plurality of co-productions have had medium budgets in the range £2 million – £4.9 million (Table 6).

Table 6 Final co-production certifications for film by budget band, 2006-2015

Budget band	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
≥10	7	9	<5	<5	<5	<5	<5	<5	<5	<5
5 - 9.9	20	13	<5	<5	5	<5	<5	<5	5	<5
2 - 4.9	28	25	<5	<5	7	8	5	<5	<5	5
<2	13	9	<5	<5	<5	<5	<5	5	6	<5
Total	**68**	**56**	**8**	**8**	**19**	**14**	**13**	**17**	**15**	**15**

Source: DCMS, BFI
Note: Entries with small numbers are shown as <5 for disclosure reasons.

The budget distribution for co-productions certified between 2006 and 2015 was much more even than for cultural test films with final certification. (Table 7). The majority of the aggregate budget is associated with films in the £2 million - £29.9 million range, whereas films budgeted at £30 million or over account for only 18% of the total budget compared with 73% for cultural test films. The table also highlights the small proportion of very low budget co-productions (2.6%), a marked contrast with cultural test films.

Table 7 Final co-production certifications, budget distribution by budget band, 2006-2015

Budget band (£ million)	Number	% number	Total budget (£ million)	% budget
≥30	6	2.6	275.3	18.1
10 - 29.9	29	12.4	440.8	29.1
5 - 9.9	59	25.3	431.3	28.4
2 - 4.9	90	38.6	311.2	20.5
0.5 - 1.9	43	18.5	57.0	3.8
<0.5	6	2.6	1.5	0.1
Total	**233**	**100.0**	**1,517.2**	**100.0**

Source: DCMS, BFI
Note: Figures/percentages may not sum to totals due to rounding.

HIGH-END TELEVISION PROGRAMME CERTIFICATIONS, 2014 AND 2015

In 2015, 58 high-end television (HETV) productions, with a total combined budget of £465 million, received final certification as British under the relevant cultural test, compared with 44 projects, with a total budget of £327 million, in 2014 (Table 8). Interim approvals under the cultural test rose slightly in the period from 64 projects with an anticipated total production value of £634 million to 69 projects with an anticipated value of £749 million.

As the number of HETV productions certified under the UK's co-production treaties is low, figures are not disclosed to maintain confidentiality.

Table 8 HETV programme cultural test certifications, 2014 and 2015

Type of certification	2014		2015	
	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	64	634.0	69	748.7
Final certification	44	326.9	58	464.7

Source: DCMS, BFI

The UK spend attributed to HETV productions receiving final certification under the cultural test in 2015 was £413 million, up from £288 million in 2014 (Table 9). As a percentage of the total budget, the UK spend associated with these projects increased very slightly from 88% in 2014 to 89% in 2015. The anticipated UK spend of interim cultural test approvals rose from £517 million in 2014 to £618 million in 2015.

Table 9 UK spend of HETV programmes with cultural test certifications, 2014 and 2015

Type of certification	2014		2015	
	UK spend	% of total budget	UK spend	% of total budget
Interim approval	517.5	81.6	618.1	82.6
Final certification	288.2	88.2	412.7	88.8

Source: DCMS, BFI

The median budget per minute for HETV productions with final certification under the cultural test in 2015 was £20,866, down from £21,615 in 2014.

ANIMATION TELEVISION PROGRAMME CERTIFICATIONS, 2014 AND 2015

A total of 51 animation television productions received final certification as British under the relevant cultural test in 2015, compared with 14 in 2014 (Table 10). The combined total budget associated with those projects rose from £22 million in 2014 to £86 million in 2015. The number of interim approvals awarded in 2015 was 25, down from 28 in 2014, but the associated production value of these projects was higher (£85 million) than in 2014 (£81 million).

As the numbers of co-productions receiving final certification in both years and interim approval in 2015 are low, figures are not disclosed to maintain confidentiality. In 2014, six co-productions, with a total budget of £11 million, received interim approval.

Table 10 Animation television programme cultural test certifications, 2014 and 2015

Type of certification	2014		2015	
	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	28	81.0	25	85.0
Final certification	14	21.5	51	86.4

Source: DCMS, BFI

The UK spend attributed to animation productions receiving final certification under the cultural test in 2015 was £62 million, an increase from £11 million in 2014 (Table 11). As a percentage of the total budget, the UK spend associated with these productions increased from 49% in 2014 to 72% in 2015. The anticipated UK spend of interim cultural test approvals fell slightly from £66 million in 2014 to £63 million in 2015 and, as a percentage of the total budget, anticipated UK spend decreased from 81% to 74%.

Table 11 UK spend of animation television programmes with cultural test certifications, 2014 and 2015

Type of certification	2014		2015	
	UK spend	% of total budget	UK spend	% of total budget
Interim approval	66.0	81.4	63.0	74.1
Final certification	10.5	49.0	62.2	72.0

Source: DCMS, BFI

The median budget per minute for television animation productions receiving final certification under the cultural test in 2015 was £6,851, compared with £7,327 in 2014.

CHILDREN'S TELEVISION PROGRAMME CERTIFICATIONS, 2015

The new tax relief for children's television programmes came into effect on 1 April 2015. Data is presented here for the period April-December 2015 (whereas data for the other screen sectors are shown for full calendar years).

Fifteen children's television productions received interim approval through the cultural test during the period. The total budget associated with these projects was £18 million and they had an anticipated UK spend of £15 million (81% of total budget). As the number of productions receiving final certification is low, figures are not disclosed to maintain confidentiality. No children's television co-productions were certified during the period.

VIDEO GAME CERTIFICATIONS, 2015

The tax relief for video games came into force on 1 April 2014. However, we are only reporting data for 2015 as this was the first full calendar year the relief was in effect.

Video games can only qualify as British for the purpose of the relief through the relevant cultural test. In 2015, 116 video games received final certification under the test, with a combined budget of £266 million (Table 12). The UK/EEA[1] spend associated with these projects was £181 million (68% of the total budget). Interim approval was granted to 121 projects with a total budget of £604 million and an anticipated UK/EEA spend of £548 million. Although there was a similar number of interim approvals and final certifications, the higher level of production value associated with projects with interim approval indicates an increase in the number of big budget video games being developed in the UK.

Table 12 Video game certifications, 2015

Type of certification	Number	UK/EEA spend (£ million)	Total budget (£ million)	UK/EEA spend as a % of total budget
Interim approval	121	548.0	603.6	90.8
Final certification	116	180.9	265.6	68.1

Source: DCMS, BFI

The median budget for video games with final certification in 2015 was £0.1 million.

[1] As the rules for tax relief for video games consider spend in the wider European Economic Area (EEA) in addition to the UK, disaggregated figures are not available.

CHAPTER 19

PUBLIC INVESTMENT IN FILM IN THE UK

Image: *Swallows and Amazons* courtesy of StudioCanal

PUBLIC INVESTMENT IN FILM IN THE UK

In recognition of the economic and cultural value of film, the UK Government, national administrations and the European Union provide financial support to film in the UK through a variety of channels. The biggest sources of public funding in 2014/15 were the film tax relief, the National Lottery and government grant-in-aid.

FACTS IN FOCUS

- Total estimated public funding for film in the UK in 2014/15 was £414 million, an increase of 3% on 2013/14.
- The principal sources of public funding were the film tax relief (61%), the National Lottery (15%) and grant-in-aid (8%) from the Department for Culture, Media and Sport (DCMS).
- The European Union contributed £8.7 million to film in the UK in 2014/15 (through the structural funds and MEDIA sub-programme), and a further £6.6 million to support UK film exports to other countries in Europe.
- In cash terms, funding was greatest in England but per capita investment was highest in Northern Ireland.
- Film production benefited from two thirds (68%) of the total financial support available in 2014/15, followed by education, young people and lifelong learning (10%).

PUBLIC FUNDING FOR FILM IN THE UK BY SOURCE

Table 1 outlines the estimated levels of public funding invested in film in the UK from 2012/13 to 2014/15. (The figures do not include some types of local authority, research council, higher or further education funding.)

Total public funding for film in 2014/15 is estimated to have been £414 million, up from £403 million in 2013/14. The largest single source of public funding in the year was the UK film tax relief, which provided £251 million (61% of the total). This was followed by the National Lottery (£63 million, 15% of the total) and grant-in-aid of £33 million (8% of the total) from the Department for Culture, Media and Sport (DCMS) to the BFI, Arts Council England (ACE) and the National Film and Television School (NFTS). The year saw an increase of £2.4 million in DCMS grant-in-aid compared with 2013/14; part of this is accounted for by changes in the recording of ACE investments in film and the moving image.

Publicly owned national broadcasters and their film arms also made substantial investments: Film4/Channel 4 invested £15.2 million in UK film and BBC Films/BBC £10.4 million.

The Northern Ireland Executive reduced investment in film between 2013/14 and 2014/15, while funding in Wales increased from £2.8 million to £3.6 million. It is not possible to say for certain whether the level of investment from the Scottish Government changed in this period as funding for the National Library of Scotland's Moving Image Archive was unavailable at the time of publication.

The European Union (EU) contributed £8.7 million to UK film activity, of which £3.8 million came from Creative Europe's MEDIA sub-programme in 2014 (see note to Table 1) and £4.9 million was via the structural funds in 2014/15. These funds, which include the European Regional Development Fund and European Social Fund, saw a substantial increase over the period. The figure for 2014/15 reflects a renewed commitment to the Yorkshire Content Fund managed by Screen Yorkshire and support for Creative England and Northern Film & Media.

Table 1 Public funding for film in the UK by source, 2012/13 - 2014/15 (ranked by 2014/15 spend)

	2012/13		2013/14		2014/15	
	£ million	%	£ million	%	£ million	%
National Lottery Distribution Fund[1]	67.4	18.5	73.1	18.1	62.8	15.2
DCMS grant-in-aid to the BFI, Arts Council England (ACE) and NFTS	27.9	7.6	30.6	7.6	33.0	8.0
Film4/Channel 4[2]	18.1	5.0	15.6	3.9	15.2	3.7
National and Regional Development Agencies[3]	9.4	2.6	9.2	2.3	12.7	3.1
BBC Films/BBC[4]	12.7	3.5	10.6	2.6	10.4	2.5
Arts Council England[5]	4.4	1.2	7.2	1.8	6.8	1.6
Other European Union (EU)[6]	1.2	0.3	5.7	1.4	4.9	1.2
EU MEDIA sub-programme[7]	5.6	1.5	4.3	1.1	3.8	0.9
Welsh Assembly Government[8]	2.3	0.6	2.8	0.7	3.6	0.9
Northern Ireland Executive[9]	2.2	0.6	3.2	0.8	2.4	0.6
Scottish Government[10]	2.2	0.6	4.1	1.0	2.1	0.5
Higher Education funding[11]	1.6	0.4	1.2	0.3	1.2	0.3
Foreign and Commonwealth Office[12]	1.2	0.3	1.1	0.3	1.1	0.3
Department for Education[13]	1.0	0.3	1.0	0.2	1.0	0.2
Skills Investment Fund training levy[14]	0.6	0.2	0.8	0.2	0.9	0.2
UK Trade & Investment[15]	0.2	0.1	0.3	0.1	0.3	0.1
Local government[16]	0.3	0.1	0.3	0.1	0.2	>0.1
Department for Business, Innovation & Skills[17]	0.8	0.2	0.0	0.0	0.1	>0.1
Other public sector[18]	0.03	>0.1	0.01	>0.1	0.01	>0.1
Total public sector selective investment[19]	**159.1**	**43.6**	**171.1**	**42.5**	**162.5**	**39.3**
UK film tax relief[20]	205.6	56.4	231.8	57.5	251.3	60.7
Total public sector selective and automatic funding	**364.7**	**100.0**	**402.9**	**100.0**	**413.8**	**100.0**

Source: Named funding sources, Bigger Picture Research analysis

Notes:

1. Allocations to the BFI, Creative Scotland, Ffilm Cymru Wales (via Arts Council of Wales) and Northern Ireland Screen (via Arts Council of Northern Ireland), plus Heritage Lottery Fund and Big Lottery awards for film-based projects.
2. Includes Film4's production investment and Channel 4 investment in the NFTS.
3. Contributions to screen agencies from National/Regional Development Agencies throughout the UK.
4. Includes BBC Films' production investment, BBC investment in the NFTS and film archives.
5. Includes ACE National Lottery investments (for example from Grants for the Arts) into moving image projects and film-related Strategic projects.
6. Investment via the European Social Fund and European Regional Development Fund.
7. The MEDIA programme ended in 2013; MEDIA is now a sub-programme of Creative Europe, the new EU programme for the cultural, creative and audiovisual sectors. The figure is for film investments only and is for calendar year 2014. For consistency with earlier years it does not include the awards to non-British sales agents and distributors handling UK film exports to the EU reported in Table 2. Data provided in Euros and converted to British pounds. Exchange rates: 2012 €1= £0.8683; 2013 €1= £0.8107; 2014 €1= £0.8486.
8. Includes funding from all Welsh government agencies to strategic bodies/projects.
9. Includes funding from all Northern Ireland government agencies to strategic bodies/projects.
10. Includes funding from all Scottish government agencies to strategic bodies/projects. The figure for 2014/15 does not include investment in the National Library of Scotland's Moving Image Archive.
11. Includes investment from Higher Education Funding Councils for England, Wales and Scotland, plus Higher Education institutions to support Creative Skillset film academies, film archives and other strategic agencies. It does not include payments from educational funding councils to other film courses (film studies, etc) in higher or further education.
12. Funding for UK-originated British Council activity. Excludes partnership funding of 'in-country' events (outside the UK).
13. Includes funding for the BFI Film Academy.
14. 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. Total levy income in 2014/15 was £863,824, while expenditure through grants was £264,676 (the remainder was carried over into 2015/16).
15. Funding for export support. UKTI was replaced by the Department for International Trade in July 2016.
16. Investment by local authorities in regional film archives, Creative England and other English regional screen agencies.
17. Includes Employer Ownership of Skills Pilot 2 investment. BIS was replaced by the Department for Business, Energy & Industrial Strategy in July 2016.
18. Very small awards (under £10,000) from a range of public sector agencies, mainly made to national/regional screen agencies.
19. Does not include transfers to and from reserves.
20. 2013/14 and 2014/15 figures are provisional.

SPEND BY AGENCY

As in previous years, HMRC was the largest net spender on film in 2014/15 (£251 million for film tax relief), followed by the BFI (£90 million), Film4/Channel 4 (£15 million), Northern Ireland Screen (£14 million) and Arts Council England (£13.5 million).

Table 2 Net film spend by agency, 2014/15[1]

	£ million	%
HMRC	251.3	54.0
BFI	90.0	19.3
Film 4/Channel 4	15.0	3.2
Northern Ireland Screen	14.2	3.1
Arts Council England[2]	13.5	2.9
NFTS	10.7	2.3
EU MEDIA sub-programme[3]	10.4	2.2
BBC Films/BBC	10.0	2.1
Scottish agencies[4]	8.7	1.9
Into Film	8.4	1.8
Creative England	7.4	1.6
Welsh agencies[5]	6.2	1.3
Film London	5.6	1.2
Creative Skillset	4.9	1.1
Other English agencies[6]	4.2	0.9
English regional film archives[7]	2.4	0.5
British Council	1.1	0.2
Big Lottery	0.9	0.2
UKTI	0.3	0.1
Heritage Lottery Fund	0.2	>0.1
Total public agencies[8]	**465.4**	**100.0**

Source: Named agencies, Bigger Picture Research analysis
Notes:
Figures/percentages may not sum to totals due to rounding.

1. Net spend means spend after deducting grants and awards to other organisations in this Table. Figures are presented net to avoid double counting.
2. Includes ACE National Lottery investments (eg from Grants for the Arts) into moving image projects, plus National Portfolio Organisation and strategic investments attributable to film and the moving image, based upon ACE calculations.
3. The figure is for film investments only and is for calendar year 2014. It also includes £6.6 million granted in support of UK films exported to the EU through schemes providing grants to non-UK distributors and sales agents handling British titles. Data provided in Euros and converted to British pounds. Exchange rates: 2012 €1= £0.8683; 2013 €1= £0.8107; 2014 €1= £0.8486.
4. Includes film expenditure on the part of Creative Scotland.
5. Includes film expenditure on the part of Ffilm Cymru Wales and the Film Archive of Wales (part of the National Library of Wales) and direct investments by the Welsh Assembly Government.
6. Includes film expenditure on the part of Northern Film & Media, Screen South and Screen Yorkshire.
7. Includes film expenditure on the part of the East Anglian Film Archive, Media Archive for Central England (MACE), North East Film Archive, North West Film Archive, Screen Archive South East, South West Film and Television Archive and the Yorkshire Film Archive.
8. The spending tabulated above includes net transfers to and from reserves and spending financed by commercial income (eg from film rights) earned by agencies as well as income derived from public sector sources. For these reasons the total spending by agencies (£465.4 million) is higher than total public funding for film in the 2014/15 year (£413.8 million, Table 1).

ACTIVITIES SUPPORTED BY PUBLIC SPENDING ON FILM

Table 3 describes the areas of activity supported by public spend on film in the UK between 2012/13 and 2014/15.

Production has consistently benefited from the largest share of public spending, primarily due to the automatic funding available through the film tax relief, although the total spend has fluctuated in line with the changing volume of production. In 2014/15, film production accounted for £317 million (68% of the total). In the same financial year, education, young people and lifelong learning had the second largest share of public spend at 10% (£46 million). This is the third consecutive year that education, young people and lifelong learning has been in second place in the Table, which is largely a result of the implementation of the BFI's *Film Forever* strategic plan from 2012/13, one of whose goals is the expansion of opportunities for film education and learning.

Public spending on distribution and exhibition activity, archives and heritage and feature film development was at a lower level in 2014/15 than it was in 2012/13, while support for training and skills and export and inward investment promotion has risen over the same period.

Table 3 Activities supported by public spend on film, 2012/13 - 2014/15 (ranked by 2014/15 spend)

	2012/13		2013/14		2014/15	
	£ million	%	£ million	%	£ million	%
Production[1]	268.7	66.9	284.2	67.5	316.6	68.0
Education, young people and lifelong learning	33.5	8.3	39.6	9.4	46.4	10.0
Administration and services to the public	14.2	3.5	7.3	1.7	24.4	5.2
Distribution and exhibition	29.0	7.2	31.8	7.6	18.6	4.0
Archives and heritage[2]	19.5	4.9	17.7	4.2	18.5	4.0
Training and skills[3]	13.5	3.4	17.7	4.2	17.7	3.8
Export and inward investment promotion[4]	10.5	2.6	9.2	2.2	13.1	2.8
Development	10.9	2.7	10.3	2.4	7.4	1.6
Business support[5]	1.6	0.4	3.1	0.7	2.7	0.6
Total public film expenditure[6]	**401.4**	**100.0**	**420.9**	**100.0**	**465.4**	**100.0**

Source: Bigger Picture Research, Creative Cultural Associates

Notes:

Percentages may not sum to 100 due to rounding.

1. Non-tax relief production spend in 2014/15 was £65.3 million.
2. National Film and Television Archive, national/regional screen archives (except Scotland's Media Image Archive) and Heritage Lottery Fund investment.
3. Skills Investment Fund, national/regional screen agency training investment, Creative Skillset film/craft and technical skills academies.
4. British Film Commission, British Council, locations services in the nations and regions and Creative Europe MEDIA sub-programme support for non-British sales agents and distributors handling UK film exports in the EU.
5. National/regional screen agency investment: primary beneficiaries are independent production companies.
6. 2014/15 total expenditure (£465.4 million) was greater than total public funding (£413.8 million, Table 1) as expenditure was supplemented by earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves.

SPEND ACROSS THE UK NATIONS

Many sources of public investment for film, such as the film tax relief, are intended for the benefit of film throughout the UK. However, some sources of funding are particular to the individual UK nations (eg investment from Ffilm Cymru Wales, Creative Scotland and Northern Ireland Screen). Table 4 shows the level of investment dedicated to each of the UK nations in 2014/15. In cash terms, England received the greatest level of funding (£27.5 million or 49% of the total nation-specific investment). In per capita terms, however, the level of investment in Northern Ireland was the highest at £7.89 per person, almost four times the level in Wales, which had the next highest spend per person at £2.00.

Table 4 Investment in film in the UK nations, 2014/15

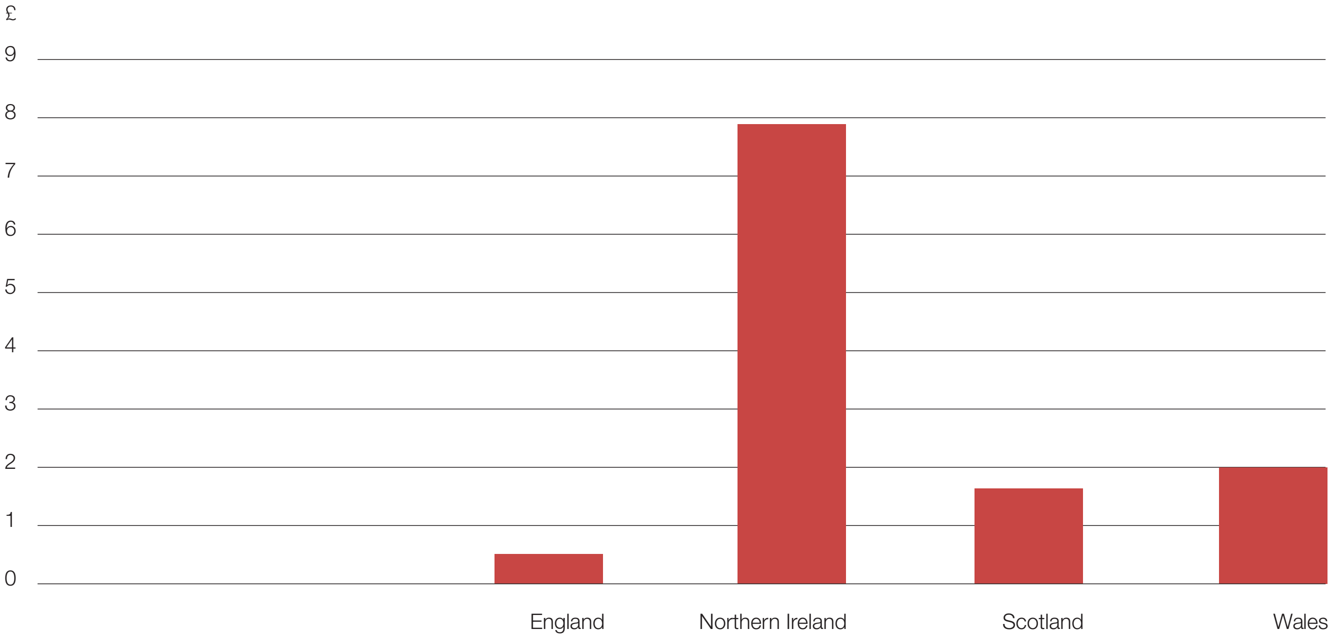
Nation	Total dedicated investment (£ million)	Population (million)	£ per person
England[1]	27.5	54.3	0.51
Northern Ireland[2]	14.2	1.8	7.89
Scotland[3]	8.7	5.3	1.64
Wales[4]	6.2	3.1	2.00

Source: Bigger Picture Research, ONS

Notes

1. Includes investment from Creative England, English regional screen agencies, English regional screen archives and Arts Council England.
2. Investment from Northern Ireland Screen and Arts Council of Northern Ireland.
3. Investment from Creative Scotland.
4. Includes investment from Ffilm Cymru Wales, Wales Film Archive, Arts Council of Wales and Welsh Assembly Government direct expenditure.

Figure 1 Per capita investment in film in the UK nations, 2014/15



	England	Northern Ireland	Scotland	Wales
Spend per person (£)	0.51	7.89	1.64	2.00

Source: Bigger Picture Research, ONS

CREATIVE EUROPE INVESTMENT IN THE UK

Creative Europe is the European Union's support programme for the cultural and audiovisual sectors. It was launched in January 2014 with a budget of €1.5 billion for the period 2014-2020, and follows on from the previous Culture and MEDIA programmes.

Creative Europe's MEDIA sub-programme supports European film and other audiovisual industries by funding the development, promotion and distribution of European works. In 2014, the MEDIA sub-programme invested £3.8 million in UK-based film activity, and nearly half of this (47%) went into film distribution (Table 5).

Table 5 Creative Europe MEDIA sub-programme investment in film in the UK, 2014

Activity area	MEDIA scheme(s)	£ million	%
Distribution	Selective, automatic, sales agents and online	1.8	46.7
Development	Single project and slate	0.6	17.9
Training & skills	Initial training	0.4	11.8
Education	Audience development	0.4	9.9
Exhibition	Film festivals and Europa Cinemas	0.3	6.9
Business support	Markets	0.3	6.8
Total		**3.8**	**100.0**

Source: Creative Europe Desk UK, Bigger Picture Research analysis
Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.8486

In addition to this, £6.6 million was invested in support of UK films exported to other countries in the EU, through schemes providing grants to non-UK distributors and sales agents handling British titles.

The MEDIA sub-programme also supports UK television and new media (including video games). UK television production benefited from £3.8 million in 2014, and £0.3 million was invested in new media (Table 6).

Table 6 Creative Europe MEDIA sub-programme investment in television and new media in the UK, 2014

Activity area	MEDIA scheme(s)	£ million
Television production	-	3.8
Television sub total		**3.8**
Business support: new media	Markets	0.07
Development: new media	Games	0.07
Training & skills: new media	Initial training	0.2
New media sub total		**0.3**
Total		**4.1**

Source: Creative Europe Desk UK, Bigger Picture Research analysis
Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.8486

BFI LOTTERY AWARDS 2015

Table 7 shows the Lottery awards made by the BFI in 2015. There were 393 awards in total (up from 385 in 2014) with a combined value of £25.5 million.

Table 7 BFI Lottery awards, 2015

Source	Number of awards	Total value (£ million)
Film Fund – Development	107	2.4
Film Fund – Pre-production	5	0.1
Film Fund – Production	26	14.9
Film Fund – Completion	11	0.5
Film Fund – Documentary	5	0.8
Film Fund – Vision Awards	5	0.5
Film Fund – International	3	0.1
Film Fund – Animation Development Lab	3	0.2
Distribution Fund – Distribution	16	1.4
Distribution Fund – International Festival Sales Support Scheme	30	0.2
Partnerships – Audience Fund	158	4.0
Partnerships – Film Academy	24	0.7
Total awards	**393**	**25.5**

Source: BFI
Notes:
BFI awards data are for calendar year 2015.
Percentages may not sum to 100 due to rounding.

The large awards for film of £250,000+ made by the BFI in 2015 are shown in Table 8. In total, 16 awards were made, half of which were for £1 million or more.

Table 8 Large awards (£250,000+) for film made by the BFI, 2015

Source	Project	Amount of award (£)
Film Fund – Production	Early Man	2,000,000
	The Girl with All the Gifts	1,780,000
	Swallows and Amazons	1,451,975
	Ethel & Ernest	1,200,000
	American Honey	1,000,000
	Free Fire	1,000,000
	A United Kingdom	1,000,000
	Viceroy's House	1,000,000
	Dark River	871,000
	City of Tiny Lights	833,469
	Fanny Lye Deliver'd	785,715
	Journeyman	775,000
	I, Daniel Blake	350,000
	Mindhorn	300,000
Film Fund – Distribution	Bill	300,000
Film Fund – Documentary	Versus: The Life and Films of Ken Loach	300,000

Source: BFI
Note: BFI awards data are for calendar year 2015.

LEADING PUBLIC INVESTORS IN BRITISH FILM PRODUCTION, 2013-2015

Table 9 shows the leading public agency and public service broadcaster investment in British films for the calendar years 2013-2015. The most frequent public investors were the BFI with 102 projects and BBC Films/BBC with 85. These projects had estimated combined budgets of £264 million and £272 million respectively. (The budget figures are for the total budget of the films, including the share of budget provided by other public investors, private investors and pre-sales.)

Table 9 Leading public investors in British film production, 2013-2015

Public funder	Number	Estimated budget (£ million)	Examples
BFI	102	264	45 Years; 20,000 Days on Earth; Suffragette; Swallows and Amazons; A United Kingdom
BBC Films/BBC	85	272	Bill; Far From the Madding Crowd; The Lady in the Van; A Little Chaos;
European agencies[1]	58	323	Alone in Berlin; The Danish Girl; The Habit of Beauty; The Salvation; Theeb
Film4/Channel 4	37	164	American Honey; Dark Horse; The Duke of Burgundy; Macbeth; Youth
English regional screen agencies	26	90	’71; Await Further Instructions; How To Talk to Girls at Parties; A Royal Night Out
Creative England	26	28	Adult Life Skills; The Levelling; Norfolk; Notes on Blindness; Spooks: The Greater Good
Scottish agencies	25	28	The Legend of Barney Thomson; Sunset Song; What We Did on Our Holiday; Where You’re Meant to Be; Una
Irish Film Board	23	47	Brooklyn; The Hallow; I Am Not a Serial Killer; The Lobster; Moon Dogs
Welsh agencies/S4C/ Welsh Government	23	37	The Canal; Dan y Wenallt (Under Milk Wood); Ethel & Ernest; The Library Suicides
Northern Ireland Screen	18	33	High-Rise; I Am Belfast; The Survivalist
Creative Europe	15	23	City of Tiny Lights; Couple in a Hole; This Beautiful Fantastic

Source: BFI production tracking

Notes:

In some cases more than one public agency contributed funding to the same film, so there is double counting of budgets and hence no total budget row.

1. Examples of European film funding agencies include Deutscher Filmförderfonds, Le Centre national du cinéma et de l’image animée and Norsk filminstitutt.

CHAPTER 20
FILM INDUSTRY COMPANIES

Image: *The Danish Girl* ©2015 Universal City Studios Productions LLLP. Courtesy of Universal Studios Licensing LLC

FILM INDUSTRY COMPANIES

In the UK, the majority of film industry companies are in the production and post-production sectors, but most of these are small companies. The exhibition sector has the greatest proportion of large companies, the top 10 of which generated 92% of the sector's total turnover in 2015.

FACTS IN FOCUS

- In 2015, there were over 6,800 film production companies and almost 2,700 post-production companies in the UK.
- There were 420 film distributors and 230 film exhibitors.
- The majority of companies were small (turnover under £250,000).
- The production, post-production and distribution sectors were concentrated in London and the South East, while the exhibition sector was more dispersed.
- Outside London and the South East there were significant production and post-production clusters in the East of England, the South West and the North West.

NUMBER OF COMPANIES IN THE FILM INDUSTRY

The number of companies involved in the film industry has grown by 47% since 2010, compared to the UK all industries average of 17% (Table 1). The most substantial growth was seen in the number of video production (198%) and distribution (89%) companies, which might partly be explained by the rise in demand for online audiovisual content. The number of film production companies has increased by 42%. In this instance, the growth may reflect the number of special purpose vehicles (SPVs) created for specific productions but which remain in existence as companies after the completion of those titles. (These SPVs will usually only be involved in the production of one film). The number of film distribution and film exhibition companies has remained broadly stable since 2010.

In 2015 there were 6,805 film production companies, 2,660 film, video and TV post-production companies, 420 film distribution companies and 230 film exhibition companies.

Table 1 Number of companies by sub-sector, 2010-2015

Sub-sector	2010	2011	2012	2013	2014	2015	Growth 2010-2015 (%)
Film production	4,795	4,845	5,190	5,450	6,090	6,805	41.9
Video production	855	1,105	1,470	1,905	2,200	2,545	197.7
Film, video and TV post-production*	2,365	2,265	2,205	2,240	2,465	2,660	12.5
Film distribution	395	420	415	395	405	420	6.3
Video distribution	45	45	60	75	80	85	88.9
Film exhibition	225	210	205	215	215	230	2.2
Total	**8,680**	**8,890**	**9,545**	**10,280**	**11,455**	**12,745**	**46.8**
UK all industries	2,100,370	2,080,860	2,149,190	2,167,580	2,263,645	2,449,415	16.6

Source: Office for National Statistics
Notes:
Data as at March 2015.
* Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Video production company turnover saw the most substantial rise between 2010 and 2015 (70%) but film production and distribution companies accounted for the largest proportions of turnover in the period (Table 2).

In 2015, the turnover of film production companies was £2,967 million, an increase of 12% compared with 2010. Film, video and TV post-production company turnover was £1,478 million, an increase of 11% on 2010, and film exhibition company turnover was £1,339 million an increase of 39% compared with 2010.

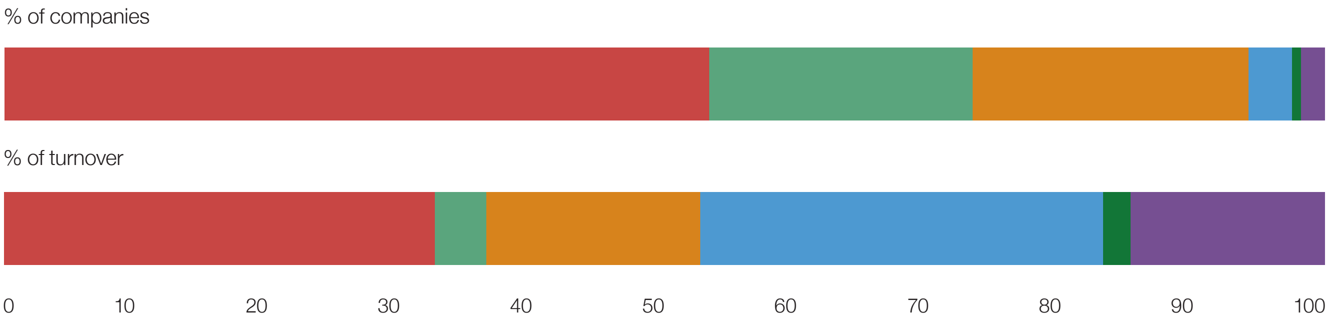
Table 2 Turnover of companies by sub-sector, £ 000, 2010-2015

Sub-sector	2010	2011	2012	2013	2014	2015	Growth 2010-2015 (%)
Film production	2,656,494	2,407,913	2,688,724	2,760,227	2,968,092	2,967,315	11.7
Video production	210,038	152,775	186,902	263,009	301,630	357,139	70.0
Film, video and TV post-production*	1,327,739	1,416,379	1,493,355	1,434,894	1,389,338	1,477,587	11.3
Film distribution	2,689,156	2,784,818	1,538,451	1,579,168	2,976,370	2,776,183	3.2
Video distribution	149,139	130,629	272,039	180,001	214,128	187,726	25.9
Film exhibition	963,578	1,183,590	1,277,739	1,261,656	1,275,566	1,339,267	39.0
Total	7,996,144	8,076,104	7,457,210	7,478,955	9,125,124	9,105,217	13.9

Source: Office for National Statistics
See notes to Table 1.

As Figure 1 shows, in 2015 although film distributors represented 3% of film industry companies, they accounted for 31% of film industry turnover. This reflects the dominant position of the UK subsidiaries of the major US studios in the film value chain. Film, video and TV post-production companies represented 21% of companies and 16% of total turnover.

Figure 1 Percentage of film and video companies and turnover by sub-sector, 2015



	% of companies	% of turnover
Film production	53.4	32.6
Video production	20.0	3.9
Film, video and TV post-production	20.9	16.2
Film distribution	3.3	30.5
Video distribution	0.7	2.1
Film exhibition	1.8	14.7

Source: Office for National Statistics

See notes to Table 1.

SIZE DISTRIBUTION OF FILM COMPANIES

The size distribution of film companies in 2015 is shown in Tables 3 to 6. In most sectors, the majority of companies were very small with an annual turnover of less than £250,000. In the film exhibition sector there were an equal number of companies with an annual turnover of less than £250,000 or £250,000 or more.

Table 3 Size distribution of film production companies, 2015

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	110	1.6	c	c
1,000 – 4,999	360	5.3	729,741	24.6
500 – 999	330	4.8	213,225	7.2
250 – 499	480	7.1	161,826	5.5
100 – 249	1,900	27.9	274,040	9.2
50 – 99	1,965	28.9	141,536	4.8
0 – 49	1,660	24.4	c	c
Total	**6,805**	**100.0**	**2,967,315**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2015
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Table 4 Size distribution of post-production companies, 2015

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	45	1.7	929,528	62.9
1,000 – 4,999	110	4.1	249,645	16.9
500 – 999	105	3.9	70,906	4.8
250 – 499	140	5.3	49,174	3.3
100 – 249	730	27.4	99,489	6.7
50 – 99	870	32.7	61,693	4.2
0 – 49	660	24.8	17,152	1.2
Total	**2,660**	**100.0**	**1,477,587**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2015
Percentages may not sum to 100 due to rounding.

Table 5 Size distribution of film distribution companies, 2015

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	25	6.0	c	c
1,000 – 4,999	45	10.7	c	c
500 – 999	45	10.7	c	c
250 – 499	40	9.5	c	c
100 – 249	110	26.2	15,670	0.6
50 – 99	75	17.9	5,330	0.2
0 – 49	80	19.0	1,628	0.1
Total	**420**	**100.0**	**2,776,183**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2015.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Table 6 Size distribution of film exhibition companies, 2015

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	10	4.3	1,224,884	91.5
1,000 – 4,999	30	13.0	62,791	4.7
500 – 999	40	17.4	28,432	1.5
250 – 499	35	15.2	11,832	0.9
100 – 249	55	23.9	8,381	0.6
50 – 99	30	13.0	2,206	0.2
0 – 49	30	13.0	741	0.1
Total	**230**	**100.0**	**1,339,267**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2015
Percentages may not sum to 100 due to rounding

NATIONAL/REGIONAL DISTRIBUTION OF FILM COMPANIES IN THE UK

Tables 7 and 8 show the national/regional distribution of film companies and film company turnover in 2015. Overall, 71% 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 (61% of companies and 97% of turnover) but the exhibition sector was more widely spread across the UK, with 74% of companies and 44% of turnover associated with companies based outside London.

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

Table 7 National/regional distribution of film companies, 2015

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
London	3,770	55.4	1,345	50.6	260	61.2	60	26.1	5,435	53.7
South East	1,090	16.0	500	18.8	70	16.5	35	15.2	1,695	16.8
East of England	455	6.7	180	6.8	30	7.1	15	6.5	680	6.7
South West	375	5.5	175	6.6	15	3.5	20	8.7	585	5.8
North West	225	3.3	105	3.9	10	2.4	20	8.7	360	3.6
Scotland	185	2.7	85	3.2	5	1.2	20	8.7	295	2.9
Yorkshire and The Humber	190	2.8	55	2.1	10	2.4	15	6.5	270	2.7
West Midlands	140	2.1	70	2.6	15	3.5	5	2.2	230	2.3
Wales	130	1.9	50	1.9	5	1.2	10	4.3	195	1.9
East Midlands	120	1.8	50	1.9	5	1.2	15	6.5	190	1.9
North East	70	1.0	25	0.9	0	–	5	2.2	100	1.0
Northern Ireland	50	0.7	20	0.8	0	–	10	4.3	80	0.8
UK	**6,800**	**100.0**	**2,660**	**100.0**	**425**	**100.0**	**230**	**100.0**	**10,115**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2015.
The overall total differs from that in Table 1 as it excludes figures for video production and distribution.
Percentages may not sum to 100 due to rounding.

Table 8 National/regional distribution of film company turnover, 2015

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%
London	2,175,914	73.3	1,065,507	72.1	2,686,999	96.8	744,299	55.6	6,672,719	77.9
South East	353,715	11.9	253,664	17.2	c	c	12,951	1.0	c	c
East of England	82,404	2.8	32,554	2.2	32,864	1.2	44,832	3.3	192,654	2.3
South West	121,390	4.1	35,217	2.4	c	c	23,538	1.8	c	c
North West	43,139	1.5	c	c	c	c	c	c	c	c
Wales	42,112	1.4	18,297	1.2	c	c	c	c	c	c
Scotland	28,464	1.0	c	c	c	c	16,074	1.2	c	c
Yorkshire and The Humber	46,838	1.6	9,387	0.6	c	c	c	c	c	c
East Midlands	23,974	0.8	c	c	c	c	c	c	c	c
Northern Ireland	19,763	0.7	c	c	c	c	30,837	2.3	c	c
West Midlands	17,793	0.6	c	c	c	c	c	c	c	c
North East	11,809	0.4	3,242	0.2	c	c	c	c	c	c
Total UK	**2,967,315**	**100.0**	**1,477,587**	**100.0**	**2,776,183**	**100.0**	**1,339,267**	**100.0**	**8,560,352**	**100.0**

Source: Office for National Statistics
Notes:
Data as at March 2015.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
The geographic distribution of turnover is given by the location of the company, not its local units, so a London concentration may be overstated for companies such as cinema chains which have local units around the UK.
The overall total differs from that in Table 2 as it excludes figures for video production and distribution.
Percentages may not sum to 100 due to rounding.

LEADING FILM PRODUCTION COMPANIES IN THE UK

Drawing on the BFI Research and Statistics Unit's production database and public information, Table 9 presents the production companies involved in the greatest number of UK feature film projects between 2013 and 2015. Three companies topped the list with a total of nine films each for the period – Working Title Films, which had the highest combined budget of the three (£177 million; equivalent to a mean budget per film of £20 million), Vertigo Films (combined budget of £45 million) and Pinewood Pictures (combined budget of £37 million). North Bank Entertainment produced eight films, but had the lowest combined budget at £500,000.

Table 9 Production companies involved in five or more UK productions, ranked by number of films, 2013-2015

Production company	Number of films	Estimated combined budget (£ million)	Selected titles
Working Title Films	9	177	The Danish Girl; Everest; The Theory of Everything
Vertigo Films	9	45	Monsters: Dark Continent; Pudsey the Dog: The Movie; Walking on Sunshine
Pinewood Pictures	9	37	Pressure; The Riot Club; Spooks: The Greater Good
North Bank Entertainment	8	0.5	Kill Kane aka Blood Relations; Poltergeist Activity; Robert the Doll
Scott Free Productions	7	235	Exodus: Gods and Kings; Get Santa; The Martian
Altitude Film Entertainment	7	15	Big Game; Kill Your Friends; Tiger House
Passion Pictures	7	5	I Am Ali; The Green Prince; Chuck Norris vs. Communism
Richwater Films	7	2	Age of Kill; Top Dog; We Still Kill the Old Way
Sixteen Films	6	12	I, Daniel Blake; Jimmy's Hall; War Book
Pulse Films	6	6	20,000 Days on Earth; American Honey; The Possibilities Are Endless
MoliFilms Entertainment	6	5	Golden Years; Montana; North v South
Fulwell 73	6	3	The Guvnors; Level Up aka London Underground; One Direction: Where We Are – The Concert Film
Roast Beef Productions	6	1	Jungle Sisters; The Russian Woodpecker; Tierra Caliente
Green Screen Productions	5	12	Bliss!; Dusty and Me aka Slapper and Me; The Journey
Film & Music Entertainment	5	5	Lost in Karastan; The President; StreetKids United II – The Girls From Rio
Unstoppable Entertainment	5	5	The Anomaly; Legacy; We are Monster
Tiger Lily Films	5	5	The Lovers and the Despot; The Ones Below; Remainder
Runaway Features	5	4	Dangerous Mind of a Hooligan; The Disappearance of Lenka Wood; White Collar Hooligan 3
The Fyzz Facility	5	3	A Patch of Fog; Scottish Mussel; The Survivalist
Hopscotch Films	5	2	Atomic: Living in Dread and Promise; The Carer; I Am Belfast
Third Films	5	2	Blood Cells; Bypass; Light Years
Templeheart Films	5	2	He Who Dares; Heretiks; The Last Scout

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 financing came from a variety of sources including National Lottery funding, UK film tax relief, equity investment, US studio investment, distributor minimum guarantees and television pre-sales.
The table includes companies associated with five or more films over the three-year period.

CHAPTER 21

THE UK FILM ECONOMY

Image: *The Martian* courtesy of Twentieth Century Fox.

THE UK FILM ECONOMY

The UK film industry is a valuable sector of the British economy; in 2014 its direct contribution to Gross Domestic Product was £4.3 billion, 28% higher than its 2005 contribution in real terms.

FACTS IN FOCUS

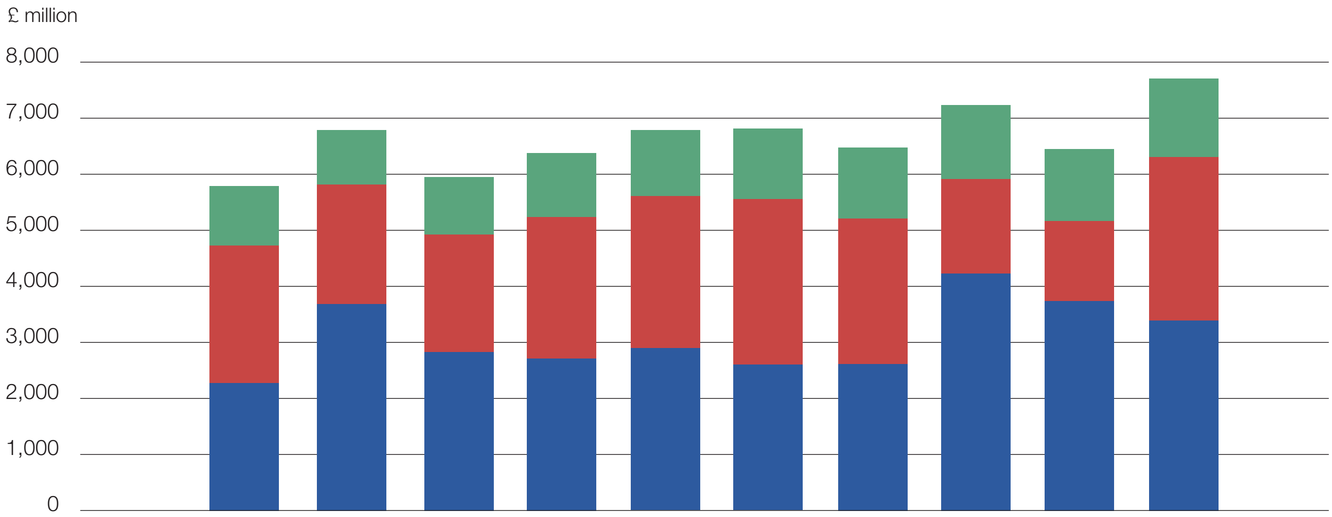
- In 2014, the UK film industry had a turnover of £7.7 billion.
- The industry's direct contribution to Gross Domestic Product (GDP) in 2014 was £4.3 billion.
- The industry exported £1.2 billion worth of services in 2014, made up of £519 million in royalties and £655 million in film production services.
- Exports in 2014 were 21% higher than in 2005.
- The UK film trade surplus in 2014 was £715 million.

FILM INDUSTRY TURNOVER, 2005-2014

Figure 1 shows the total turnover of the UK's three main film industry sectors (film and video production, film and video distribution and film exhibition) for the period 2005-2014 (2014 is the latest year for which data are available.) Each of the three sectors has shown growth over the decade, with total industry turnover increasing from £5.8 billion in 2005 to over £7.7 billion in 2014. However, for 2009, 2011 and 2012 the turnover for film and video distribution includes only film distribution as the data for video distribution are not disclosed to maintain confidentiality.

The chart shows that turnover for film distribution decreased significantly from £2.6 billion in 2011 to £1.7 billion in 2012 but, according to the Office for National Statistics, this is mainly due to the restructuring of some businesses and the resultant changes to their industrial classifications. (For details of the Standard Industrial Classification [SIC] framework, see the notes to Figure 1.) The reclassifications are contained within the SIC code 5913 (film, video and TV programme distribution). The combined turnover for film and video distribution increased from £1.4 billion in 2013 to £2.9 billion in 2014.

Figure 1 Total turnover of UK film industry by sector, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2005-2014
Film and video production (including post-production)	2,280	3,693	2,830	2,717	2,889	2,596	2,619	4,238	3,742	3,392	49
Film and video distribution	2,450	2,125	2,105	2,524	2,710	2,950	2,592	1,680	1,425	2,926	19
Film exhibition	1,065	976	1,022	1,141	1,176	1,257	1,270	1,325	1,290	1,394	31
Total	**5,795**	**6,794**	**5,957**	**6,382**	**6,775**	**6,803**	**6,481**	**7,243**	**6,457**	**7,712**	**33**

Source: Office for National Statistics

Notes:

'Total turnover' is expressed in current values, ie not adjusted for inflation.

Standard Industrial Classification (SIC) codes are used to classify businesses according to the type of their economic activity. The classifications were last revised in 2003 and 2007. The SIC codes can be found at https://www.gov.uk/government/publications/standard-industrial-classification-of-economic-activities-sic.

For 2005-2007 data are for 2003 SIC codes 9211 (film and video production), 9212 (film and video distribution) and 9213 (film exhibition).

From 2008 onwards, we define film and video production as the sum of 2007 SIC codes 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 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV programme distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

The figures for 2012 and 2013 have been revised since publication of the 2015 Statistical Yearbook.

The 2007 SIC codes allow for a more detailed breakdown of industry turnover by sub-sector, as shown in Table 1. This gives an official measure of film production and distribution separate from video production and distribution. The figures reflect the high sunk costs associated with the production and marketing of feature films and highlight the relative importance of the post-production sector (19% of turnover, although this includes activity associated with video and TV as well as film).

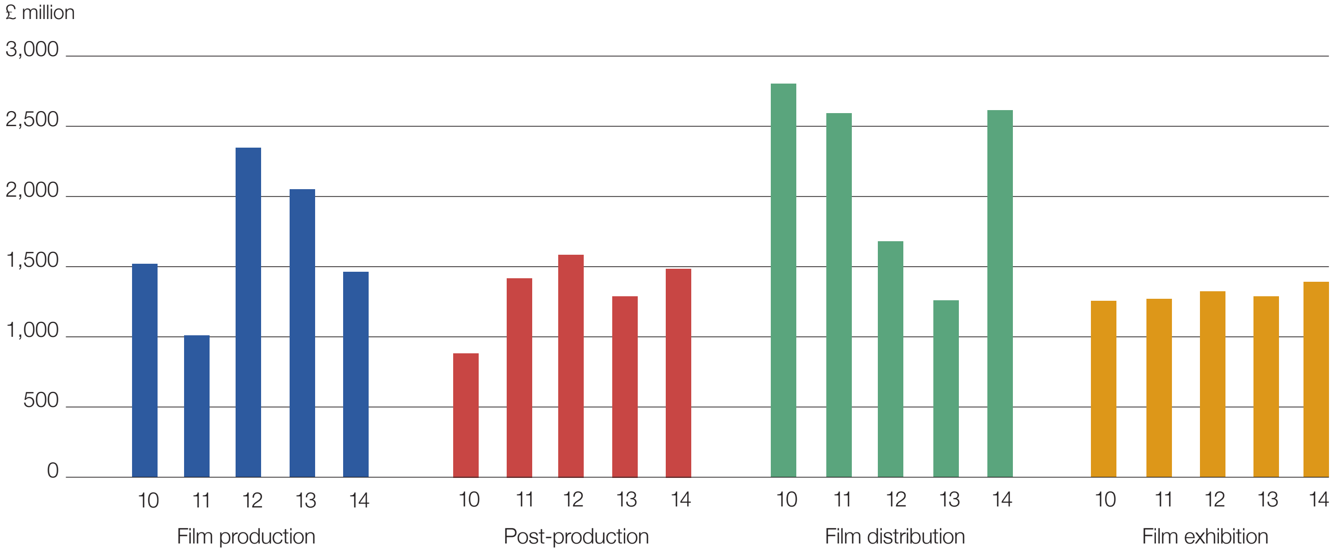
Table 1 Total turnover of UK film industry by sub-sector, 2014

Sub-sector	Turnover (£ million)	% of total
Film production	1,464	19.0
Video production	438	5.7
Film, video and TV post-production	1,490	19.3
Film distribution	2,615	33.9
Video distribution	311	4.0
Film exhibition	1,394	18.1
Sector total	**7,712**	**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.

Figure 2 shows the turnover for film production, film, video and TV post-production, film distribution and film exhibition from 2010 to 2014. Film distribution has traditionally had the highest turnover of all film industry sub-sectors. This remained true of all years in the period covered in the chart with the exception of 2012 and 2013 when turnover was lower than for most other sub-sectors. This is partly explained by the reclassifications of businesses within the distribution sector. In 2014, the turnover for distribution returned to pre-2012 levels, with an increase of £1.4 billion on the previous year. Turnover for both the post-production and film exhibition sub-sectors increased every year in the period with the exception of 2013.

Figure 2 Total turnover of film sub-sectors, 2010-2014



	Film production	Post-production	Film distribution	Film exhibition
Turnover	1,520 1,009 2,346 2,053 1,464	885 1,421 1,590 1,293 1,490	2,805 2,592 1,680 1,261 2,615	1,257 1,270 1,325 1,290 1,394

Source: Office for National Statistics Annual Business Survey
See notes to Table 1.

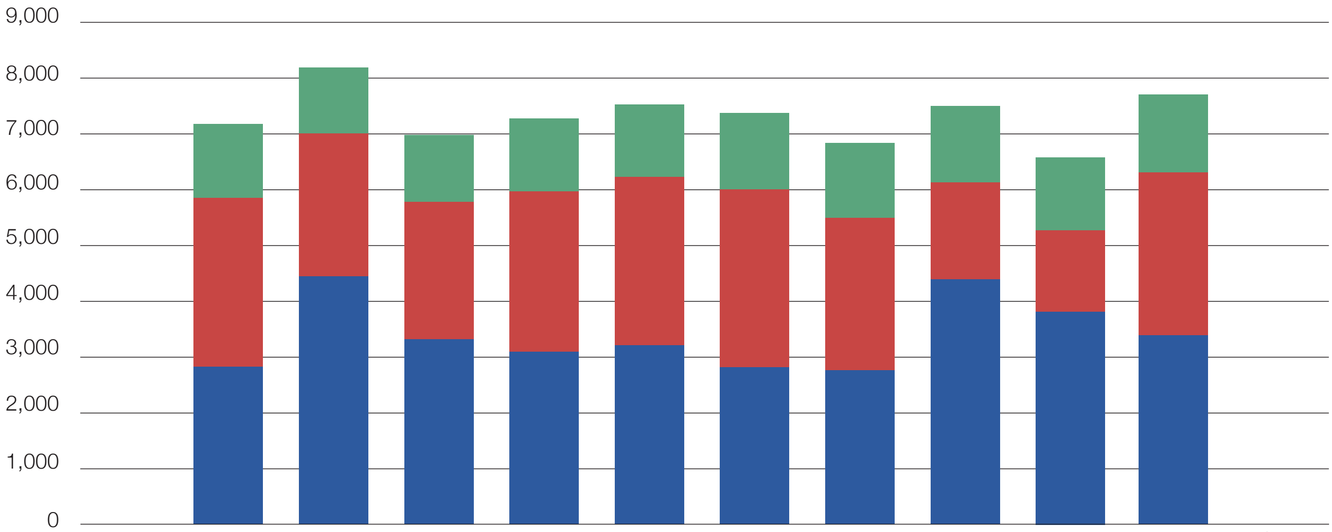
Total industry turnover between 2005 and 2014, expressed in real terms, ie with the effects of inflation removed, is shown in Figure 3. The real increase since 2005 has been 20% for film and video production and 6% for film exhibition.

Conversely, real turnover for film and video distribution appears to have declined by 4% since 2005. Notwithstanding the adjustment to turnover resulting from the reclassifications of businesses within distribution outlined above, the decline in real turnover could be a result of the fall in physical video revenues over the period.

For the film industry as a whole, real turnover was just over £7.7 billion in 2014, the highest figure since 2006 (Figure 1.3). The year with the lowest real turnover of the period was 2013 with a total £6.6 billion in 2014 pounds.

Figure 3 Inflation-adjusted turnover of UK film industry by sector, 2005-2014

£ million (2014 pounds)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2005-2014
Film and video production (including post-production)	2,827	4,454	3,323	3,100	3,215	2,816	2,765	4,395	3,819	3,392	20
Film and video distribution	3,037	2,563	2,472	2,879	3,016	3,200	2,736	1,742	1,454	2,926	-4
Film exhibition	1,320	1,177	1,200	1,302	1,309	1,364	1,341	1,374	1,317	1,394	6
Total	**7,184**	**8,194**	**6,995**	**7,281**	**7,540**	**7,380**	**6,842**	**7,512**	**6,590**	**7,712**	**7**

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, which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2016.
Values expressed in constant 2014 pounds.
For sector classifications, see notes to Figure 1.
For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV distribution (59133).
For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.
Figures may not sum to totals due to rounding

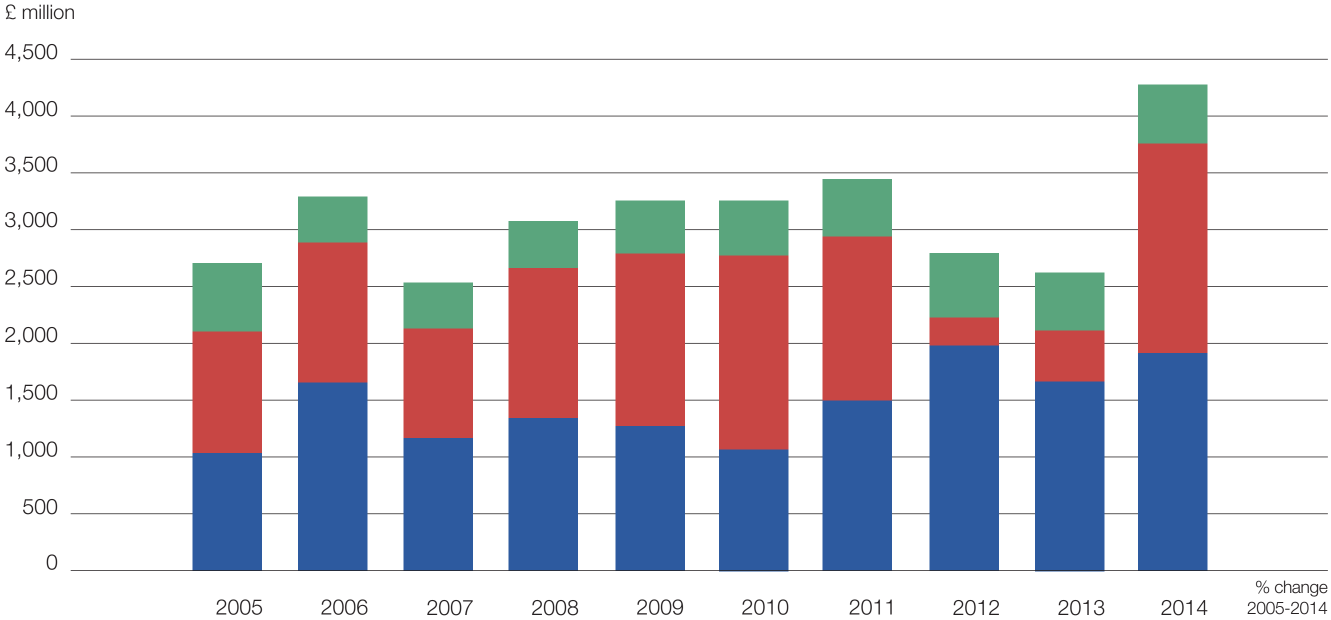
FILM INDUSTRY CONTRIBUTION TO GDP, 2005-2014

The direct contribution an industry makes to UK Gross Domestic Product (GDP) 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 an industry's ability to generate income for its workers, company owners and investors.

The UK film industry's GVA in 2014 was £4.3 billion. According to data published by the government in January 2016, the GVA for all UK creative industries in 2014 was £84.1 billion, so film accounted for at least 5% of all creative industries' value added.

For the film industry as a whole, production accounted for 45% of the industry's value added, distribution 43% and exhibition 12%. Also, as with turnover (see section above), the value added for film distribution decreased between 2011 and 2012 due to the reclassifications of businesses in the distribution sector.

Figure 4 UK film industry gross value added, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2005-2014
Film and video production (including post-production)	1,035	1,957	1,170	1,342	1,275	1,071	1,495	1,976	1,671	1,915	85
Film and video distribution	1,072	1,232	964	1,317	1,517	1,706	1,442	249	448	1,848	72
Film exhibition	600	407	403	415	466	483	505	567	507	517	-14
Total	**2,707**	**3,596**	**2,537**	**3,074**	**3,258**	**3,260**	**3,442**	**2,792**	**2,626**	**4,280**	**58**

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 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the 4-digit class total (5913) minus TV distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

The figures for 2012 and 2013 have been revised since publication of the 2015 Yearbook.

Table 2 shows the GVA breakdown in 2014 by the 2007 SIC codes. Film distribution was the highest single contributor (£1,670 million; 39% of the total) followed by film, video and TV post-production (£928 million; 22% of the total).

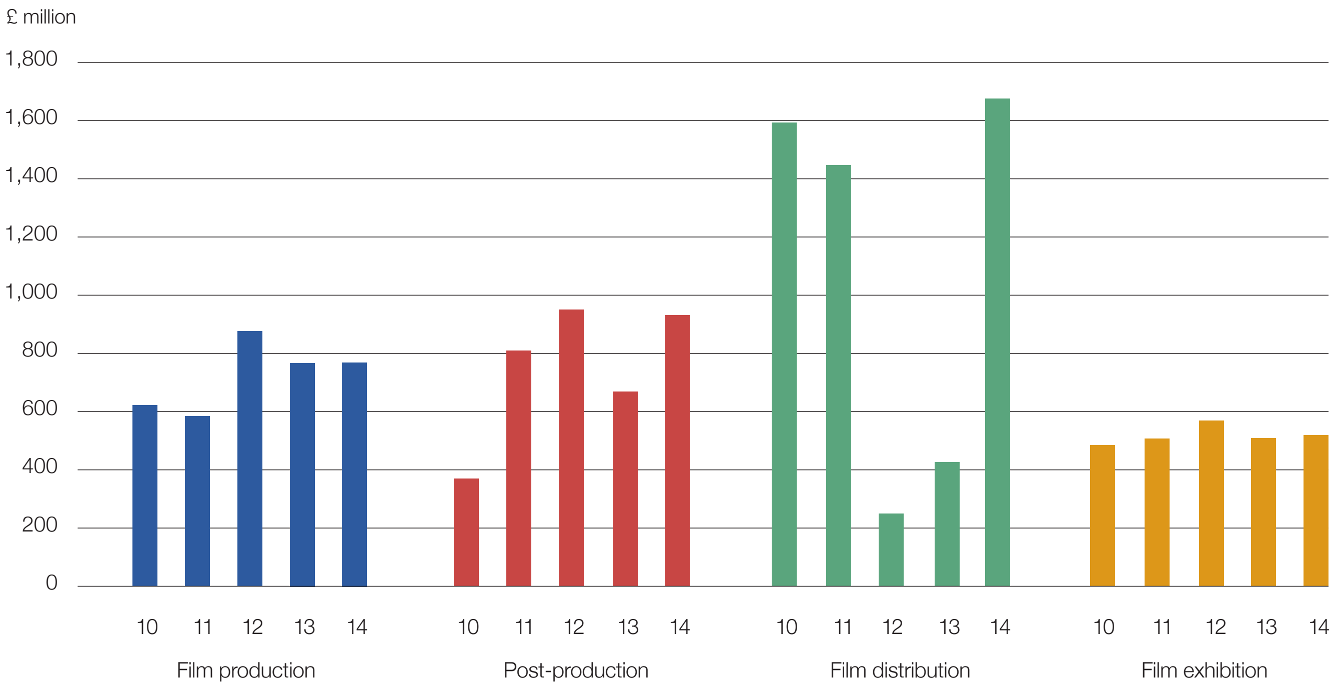
Table 2 UK film industry gross value added, 2014

Sub-sector	GVA (£ million)	% of total
Film production	767	17.9
Video production	220	5.1
Film, video and TV post-production	928	21.7
Film distribution	1,670	39.0
Video distribution	178	4.2
Film exhibition	517	12.1
Sector total	**4,280**	**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.

The patterns of GVA by sub-sector from 2010 to 2014 are similar to those for total turnover (Figure 5). As with turnover, film distribution consistently had the highest value added in 2010 and 2011 but, because of the reclassifications of companies within the distribution sector, its contribution to GVA was just £249 million in 2012 and £426 million in 2013. In 2014, film distribution value added recovered to pre-2012 levels, increasing almost four-fold to £1.67 billion. Film, video and TV post-production also saw a substantial increase in value added between 2013 and 2014, while both the film production and film exhibition sectors recorded modest rises.

Figure 5 Gross value added of film sub-sectors, 2010-2014

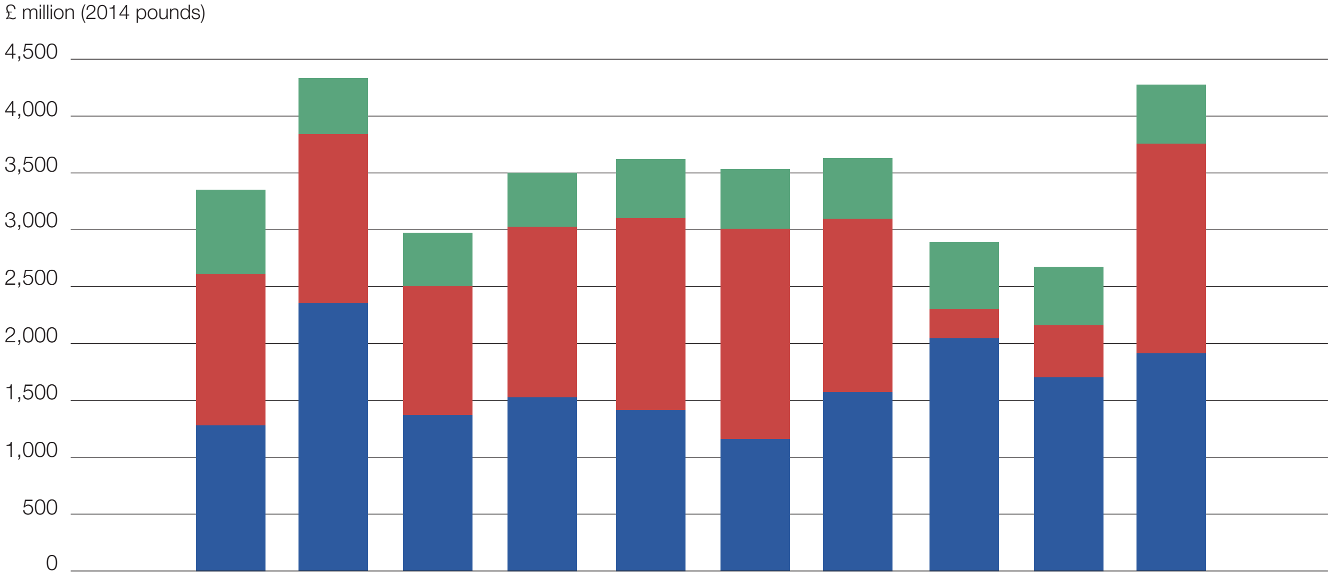


	Film production 10	11	12	13	14	Post-production 10	11	12	13	14	Film distribution 10	11	12	13	14	Film exhibition 10	11	12	13	14
GVA	621	583	874	766	767	367	806	946	665	928	1,588	1,442	249	426	1,670	483	505	567	507	517

Source: Office for National Statistics Annual Business Survey
See note to Table 2.

Figure 6 shows the industry's value added expressed in real terms, ie with the effects of inflation removed. For the four years 2008 to 2011, real GVA was around £3.5 billion (in 2014 pounds) but decreased to £2.9 billion in 2012 and to £2.7 billion in 2013. The decrease was mainly due to the reduction in GVA for film distribution, caused by the reclassifications of companies within the distribution sector. However, the distribution element increased substantially in 2014. In real terms, GVA for the film industry as a whole in 2014 was 28% higher than its value in 2005.

Figure 6 UK film industry real gross value added, 2005-2014



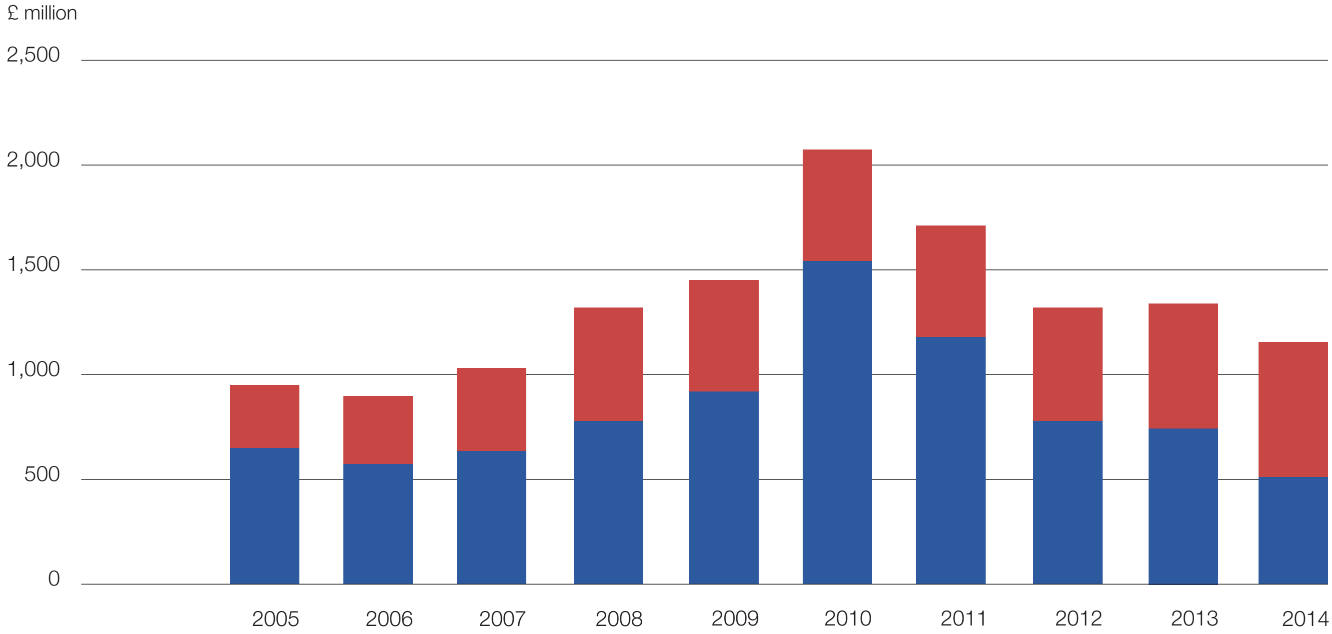
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2005-2014
Film and video production (including post-production)	1,283	2,360	1,374	1,531	1,419	1,162	1,578	2,049	1,705	1,915	49
Film and video distribution	1,329	1,486	1,132	1,502	1,688	1,851	1,522	258	457	1,848	39
Film exhibition	744	491	473	473	519	524	533	588	517	517	-30
Total	**3,356**	**4,337**	**2,979**	**3,507**	**3,626**	**3,537**	**3,634**	**2,896**	**2,680**	**4,280**	**28**

Source: Office for National Statistics Annual Business Inquiry, HM Treasury
Notes:
The deflator used to calculate real values is the UK whole economy deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2016.
Values expressed in constant 2014 pounds.
For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the 4-digit class total (5913) minus TV distribution (59133).
For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

FILM EXPORTS, 2005-2014

The UK film industry exported £1,174 million worth of services in 2014 (the latest year for which data are available), of which £519 million came from royalties and £655 million from film production services (Figure 7). This is the first time that export revenues for production services have exceeded royalty payments to UK based companies as components of the overall export figure. Royalties fell by 31% compared with 2013, but the export value of film-related services increased by 8%. Total film exports in 2014 were 21% higher than in 2005, but have declined since a peak of £2,106 million in 2010.

Figure 7 UK film industry exports, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Royalties	660	582	646	792	935	1,566	1,199	792	756	519
Film production services	307	330	403	549	541	541	540	550	605	655
Total film company exports	**967**	**912**	**1,049**	**1,341**	**1,476**	**2,106**	**1,739**	**1,342**	**1,361**	**1,174**

Source: Office for National Statistics
Notes:
Data for 2015 are expected to be available at the end of January 2017.
This chart shows the results for film companies only. Import and 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 SIC codes relating to film and television. This survey was discontinued and film and television data for 2009 and later were collected in the ONS Annual Survey of International Trade in Services.

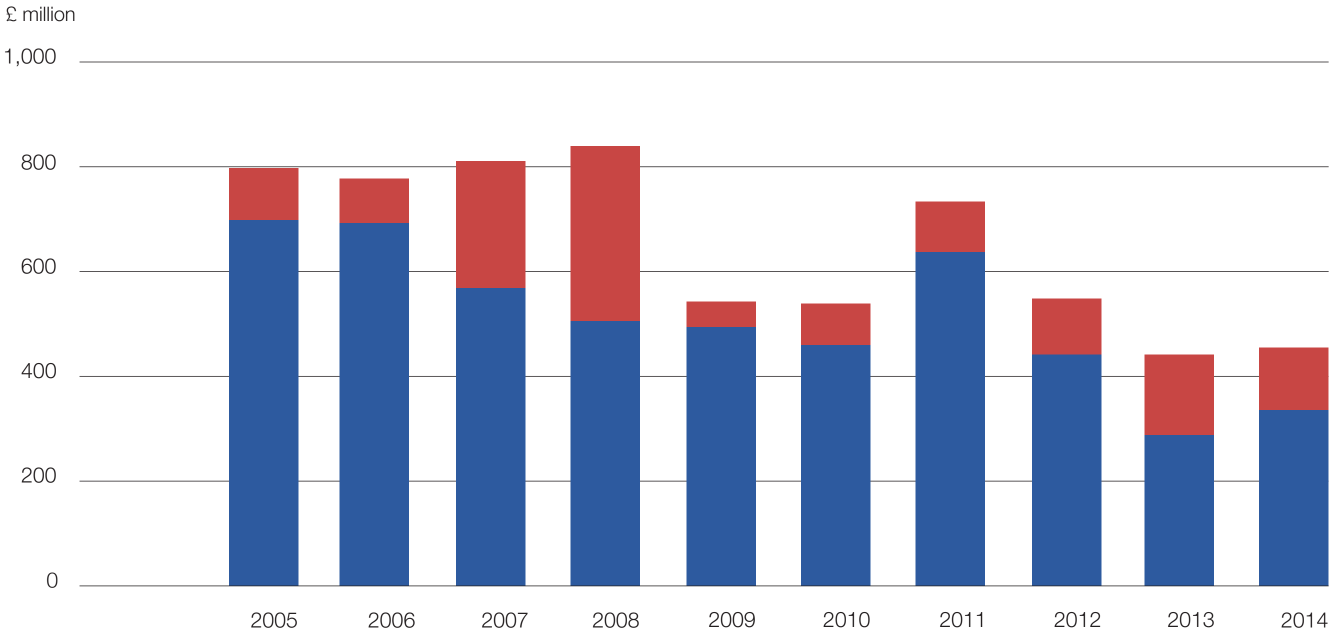
FILM IMPORTS, 2005-2014

The UK film industry imported £459 million worth of services in 2014, of which £338 million (74%) comprised royalties and £121 million (26%) film production services.

As Figure 8 shows, in most years royalties make up the vast majority of imports with film production services accounting for only around 15% of the total. However, the production services share was as high as 30% in 2007, 40% in 2008 and 35% in 2013.

The reasons for the increased share in these years are unclear as the reported level of production imports is relatively large in relation to total UK film production for these years. 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 8 UK film industry imports, 2005-2014



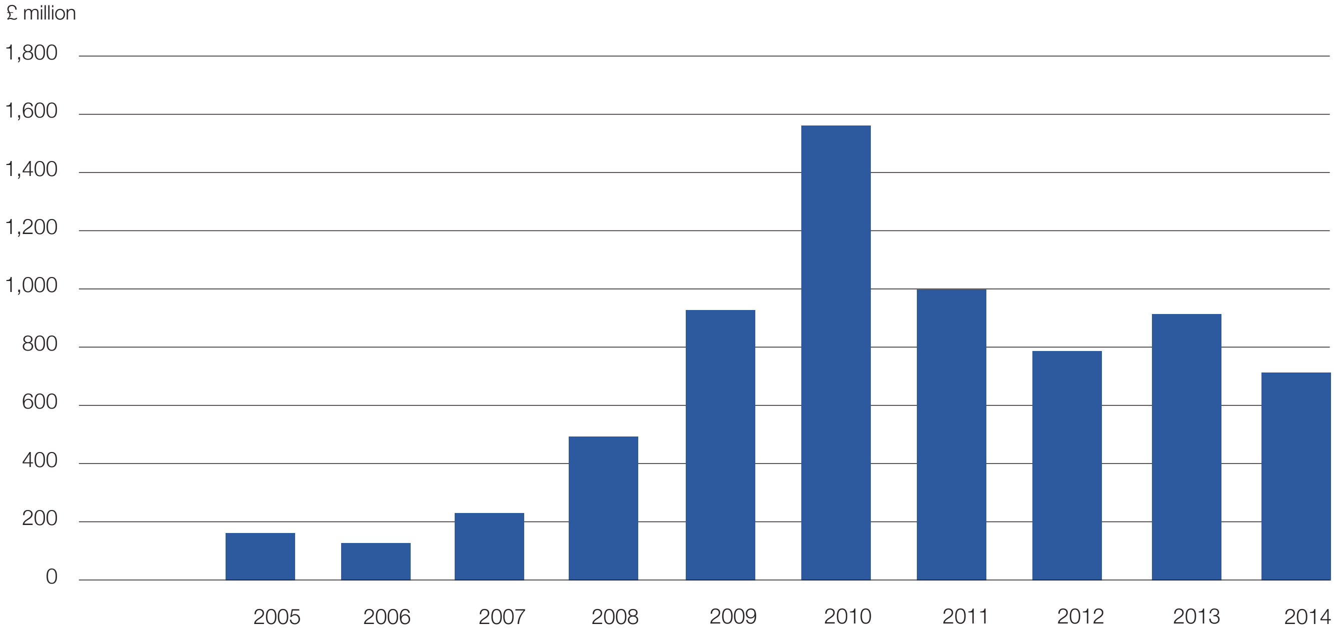
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Royalties	704	698	573	510	498	463	642	445	290	338
Film production services	100	86	245	336	49	80	98	108	155	121
Total film company imports	**804**	**784**	**818**	**846**	**547**	**543**	**740**	**553**	**445**	**459**

Source: Office for National Statistics
See notes to Figure 7.

THE FILM TRADE BALANCE, 2005-2014

The film industry has made a continuous positive contribution to the UK balance of payments since 2005, as Figure 9 shows. The trade surplus (positive balance of exports over imports) in 2014 was £715 million. As with exports, the balance of payments has decreased since a peak in 2010 (£1,564 million).

Figure 9 Trade surplus of UK film industry, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Balance	163	128	231	495	929	1,564	1,000	789	916	715

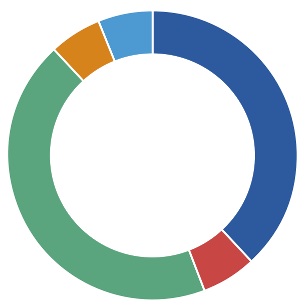
Source: Office for National Statistics
Note: 'Trade surplus' equals exports minus imports. Where a company (eg the UK subsidiary of a US major) receives income from another country on behalf of its parent company and subsequently passes it on to its parent company, this is recorded both as a receipt and a payment, leaving the measure of the trade surplus unaffected.

FILM EXPORT MARKETS

Figure 10 shows the geographic distribution of UK film exports for the years 2010-2014. In the previous five-year period (2009-2013) covered in the 2015 Statistical Yearbook, exports to the European Union (EU) surpassed the USA for the first time since our records began. For the current five-year period, the USA is once again the primary export destination for UK film with a 44% share of exports compared with the EU's 38%. However, taken together, EU and non-EU European countries are slightly ahead of the USA with a 44.3% share of all UK film exports. Asia and 'rest of the world' both took around 6% of the total, which is unchanged from the previous five-year period.

Figure 10 Destination of UK film exports as percentage of the total, 2010-2014

	%
EU	38.1
Other Europe	6.2
USA	44.0
Asia	5.7
Rest of the world	6.0



Source: Office for National Statistics
Note: 'Rest of the world' cannot be disaggregated due to sampling variation and disclosive data.

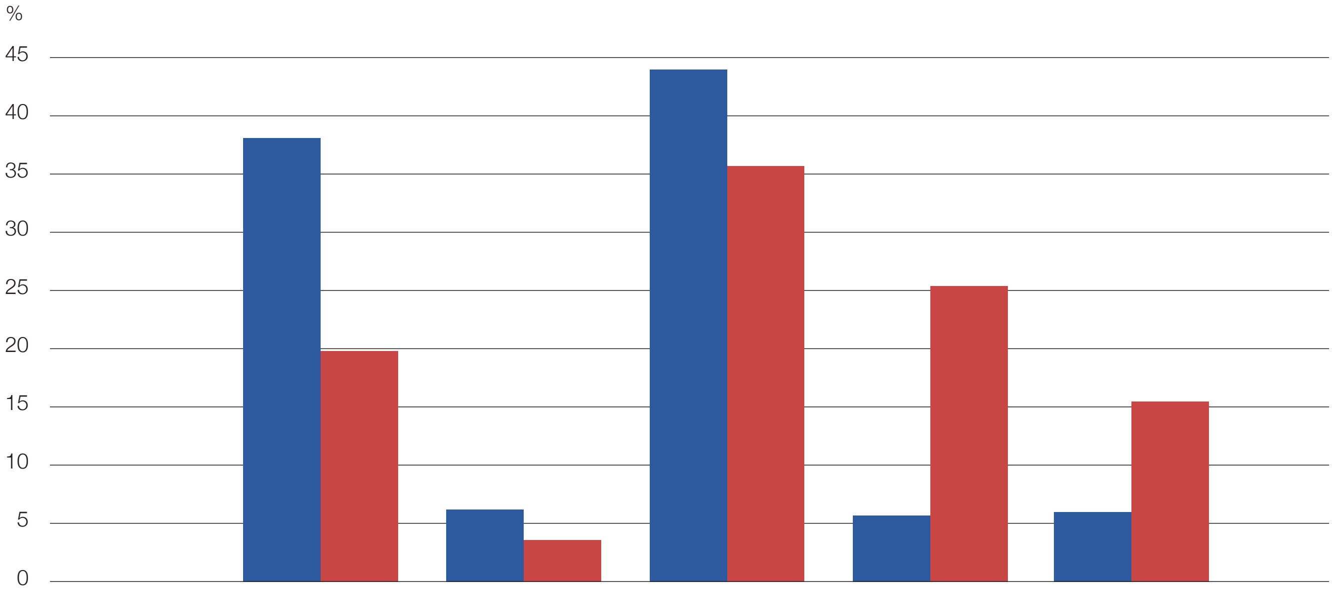
UK FILM EXPORTS COMPARED WITH THE GLOBAL MARKET FOR FILMED ENTERTAINMENT

A useful comparison can be made between UK film export shares and the geographical distribution of the global market for filmed entertainment (Figure 11). 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 for Asia and 'rest of the world'. The differences that stand out are:

- The higher proportion of UK exports to Europe (38% 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 6% 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 (25%).

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 UK (and USA) films. There are also export restrictions in the Chinese market.

Figure 11 UK export shares, 2010-2014, compared with the ex-UK global market for filmed entertainment, 2014



	EU	Other Europe	USA	Asia	Rest of the world	Total
% of total film exports	38.1	6.2	44.0	5.7	6.0	**100.0**
% of total global filmed entertainment market	19.8	3.6	35.7	25.4	15.5	**100.0**

Source: Office for National Statistics, PricewaterhouseCoopers

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 5% of the film trade balance, with 'rest of the world', as shown in Table 3. In contrast with some earlier years, the UK ran large film trade surpluses with the USA in the years 2010-2014. During the period, the USA accounted for just over half of the UK's film trade surplus, while EU countries other than the UK accounted for two fifths of the surplus.

Table 3 International transactions of the UK film industry by geographical area, annual average, 2010-2014

	Exports (£ million)	Imports (£ million)	Balance (£ million)	% balance
EU	587.6	188.0	399.6	40.1
Other Europe	95.6	30.0	65.6	6.6
USA	680.0	152.2	527.8	53.0
Asia	88.4	33.4	55.0	5.5
Rest of the world	92.6	144.4	-51.8	-5.2
Total	**1,544.2**	**548.0**	**996.2**	**100.0**

Source: Office for National Statistics

BFI Film Forever

CHAPTER 22

EMPLOYMENT IN THE FILM INDUSTRY

EMPLOYMENT IN THE FILM INDUSTRY

The UK film industry employs significant numbers of skilled individuals. In 2015 around 66,000 people were working across the industry's three main sectors with 71% of those involved in production. However, employment in production is concentrated in London and the South East.

FACTS IN FOCUS

- In 2015, around 66,000 people worked in the UK film industry, of whom 47,000 worked in film and video production.
- In 2015, 65% of the UK film and video production workforce was based in London and the South East.
- Just over half (51%) of people working in film and video production were freelance.
- Women made up just 9% of directors and 14% of screenwriters of British films released in the UK in 2015 compared with 10% of directors and 14% of screenwriters in 2014.
- Most film industry businesses had low numbers of employees, in particular those involved in film and video production, where 96% of workplaces employed 10 people or fewer.

THE WORKFORCE

According to the Annual Population Survey (APS) conducted by the Office for National Statistics (ONS), around 66,000 people worked in film and video production, film and video distribution, and film exhibition in the year 2015. The figures include full- and part-time workers. Table 1 shows the breakdown.

Table 1 Film industry workforce, 2015

Sector	Number in employment
Film and video production	47,000
Film and video distribution	6,000
Film exhibition	13,000
Total	**66,000**

Source: Office for National Statistics

Notes:

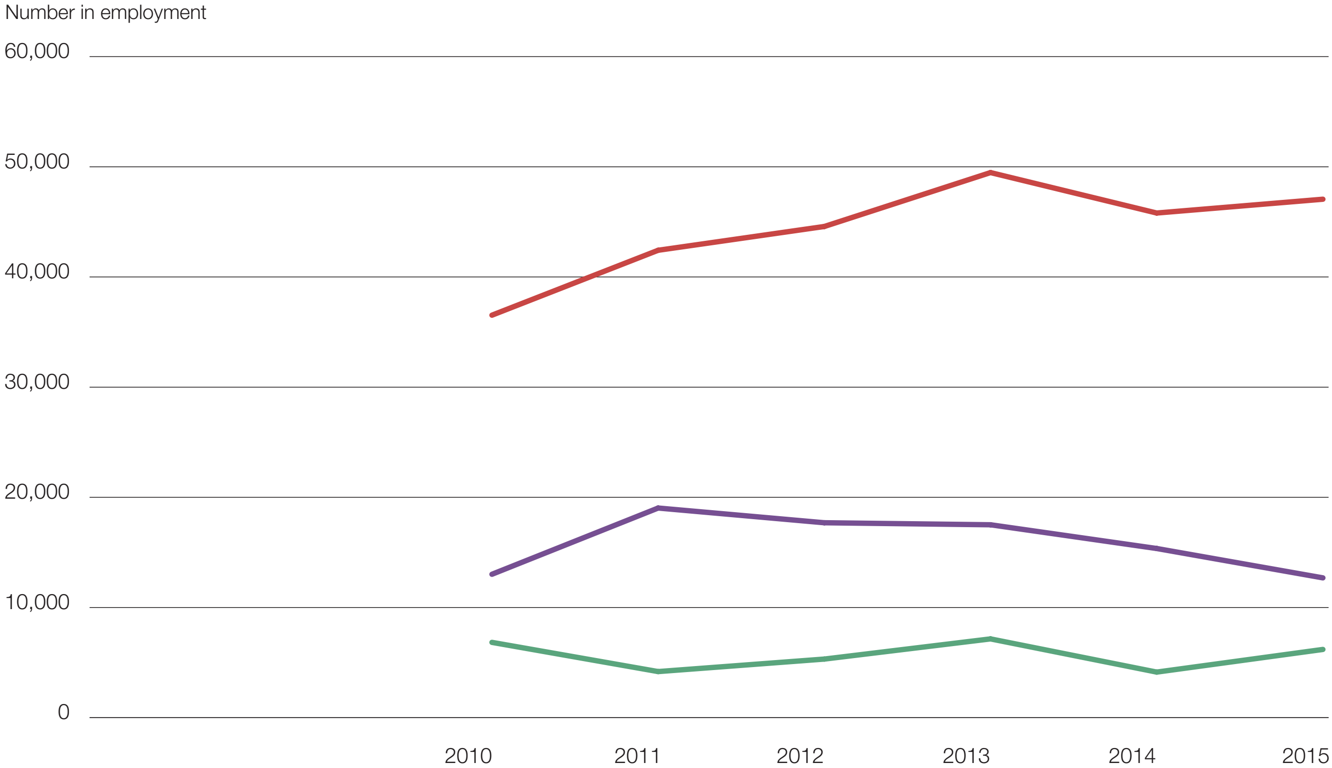
Numbers in employment are taken from the Annual Population Survey for the period January to December 2015.

Figures are shown to the nearest 1,000.

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.

As Figure 1 shows, employment levels across all three main sectors have fluctuated between 2010 and 2015. The film and video production workforce has increased from 37,000 in 2010 to 47,000 in 2015, while the film and video distribution workforce has fallen from 7,000 to 6,000 during the period. The number of employees in film exhibition was the same in 2015 as in 2010 (13,000) but was as high as 18,000 in both 2012 and 2013 and 19,000 in 2011.

Figure 1 Size of the film workforce, 2010-2015



	2010	2011	2012	2013	2014	2015
Film and video production	37,000	42,000	45,000	49,000	46,000	47,000
Film and video distribution	7,000	4,000	5,000	7,000	4,000	6,000
Film exhibition	13,000	19,000	18,000	18,000	15,000	13,000

Source: Office for National Statistics
Note: Figures have been updated since the publication of employment data in the 2014 Statistical Yearbook.

The film and video production sector has traditionally employed a high proportion of freelance workers. In 2015, 51% of those engaged in film and video production, a total of more than 24,000 people, were self-employed (Table 2). In comparison, only 15% of the total UK workforce was self-employed in 2015.

Table 2 Film and video production workforce, 2010-2015

Year	Total in employment	Self-employed	Self-employed as % of total
2010	37,000	20,000	54
2011	42,000	24,000	57
2012	45,000	22,000	49
2013	49,000	24,000	49
2014	46,000	28,000	61
2015	47,000	24,000	51

Source: Office for National Statistics
Notes:
Numbers in employment are shown to the nearest 1,000 but percentages are based on unrounded numbers.
See note to Figure 1.

THE GENDER OF WRITERS AND DIRECTORS OF UK FILMS

Since 2007, we have been tracking the gender of screenwriters and directors of UK films. In 2013, we published a report *Succès de plume? Female Screenwriters and Directors of UK Films, 2010-2012* which showed that although the numbers of female writers and directors of UK films released are consistently low, recently higher proportions of women have been associated with successful films. Of the independent UK films released between 2010 and 2012, just 16% of the writers and 11% of the directors were women. However, for the top 20 UK independent films over the same period, women represented 37% of the writers and 18% of the directors. And for profitable UK independent films, 30% of the writers were women.

Female writers and directors of independent UK films released between 2007 and 2015 include: Bola Agbaje and Destiny Ekaragha (*Gone Too Far!*); Jane English and Dania Pasquini (*StreetDance, StreetDance 2*); Jane Goldman (*The Woman in Black, Kick-Ass*); Olivia Hetreed and Andrea Arnold (*Wuthering Heights*); Debbie Isitt (the Nativity! trilogy); Rebecca Johnson (*Honeytrap*); Abi Morgan (*The Iron Lady, Shame, The Invisible Woman*); Lone Scherfig (*An Education, The Riot Club*); Emma Thompson (*Effie Gray*); and Lucinda Whiteley (*Horrid Henry: The Movie*).

In addition to independent UK films, a number of female writers and directors had success over the same period working on UK-USA studio titles. Examples include: Jane Goldman (*X-Men: First Class*); Lone Scherfig (*One Day*); Sarah Smith (*Arthur Christmas*); and Emma Thompson and Susanna White (*Nanny McPhee and the Big Bang*).

In 2015, of the 285 identified writers of UK films released during the year, 41 (14%) were women (Table 3). Female writers associated with UK films released in the year include: Alecky Blythe (*London Road*); Alison Deegan (*A Little Chaos*); Jane Goldman (*Kingsman: The Secret Service*); Abi Morgan (*Suffragette*); and Juliette Towhidi (*Testament of Youth*).

Table 3 Gender of writers of UK films released in the UK, 2007-2015

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Number of UK films released in the UK	108	111	114	119	127	162	139	154	209
Number of writers associated with these films	169	168	140	143	159	187	155	211	285
Number of male writers	149	139	117	126	129	162	133	181	244
Number of female writers	20	29	23	17	30	25	22	30	41
% male	88.2	82.7	83.6	88.1	81.1	86.6	85.8	85.8	85.6
% female	11.8	17.3	16.4	11.9	18.9	13.4	14.2	14.2	14.4

Source: BFI

Table 4 shows directors by gender for UK films released in the UK between 2007 and 2015. The proportion of female directors in 2015 was the lowest since 2012, and overall the third lowest of the period.

Some of the female directors associated with UK films released in 2015 are: Sarah Gavron (*Suffragette*); Carol Morley (*The Falling*); Jane Preston (*Gascoigne*); Louise Osmond (*Dark Horse*) and Debbie Tucker Green (*Second Coming*). Carol Morley, Louise Osmond, Jane Preston and Debbie Tucker Green wrote the scripts of their films as well as directing them.

Table 4 Gender of directors of UK films released in the UK, 2007-2015

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Number of UK films released in the UK	108	111	114	119	127	162	139	154	209
Number of directors associated with these films	117	113	123	133	140	179	149	165	224
Number of male directors	110	100	102	116	119	165	128	148	203
Number of female directors	7	13	21	17	21	14	21	17	21
% male	94.0	88.5	82.9	87.2	85.0	92.2	85.9	89.7	90.6
% female	6.0	11.5	17.1	12.8	15.0	7.8	14.1	10.3	9.4

Source: BFI

THE WORKPLACE LOCATION

In 2015, 65% of the UK film and video production workforce was based in London and the South East, compared with less than 30% of the workforce as a whole (Table 5).

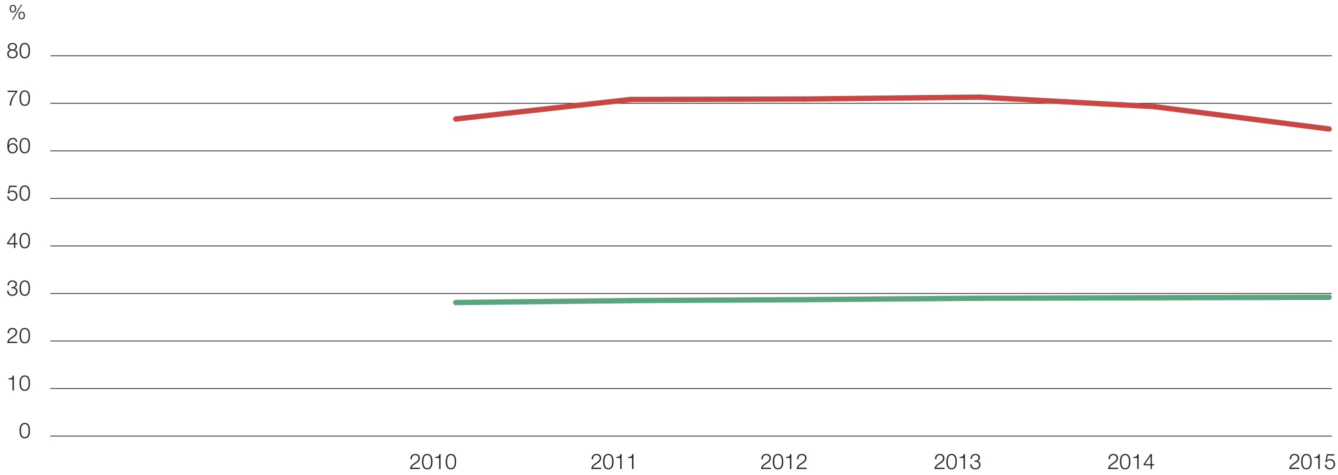
Table 5 London and South East employment as percentage of total, 2015

Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	31,000,000	9,000,000	29.2
Film and video production	47,000	30,000	64.6

Source: Office for National Statistics
Notes:
The South East region wraps around London so includes the major studios to the west of the city.
Totals shown in this table are for the calendar year 2015.
Numbers in employment in the film industry are shown to the nearest 1,000 and for all UK industries are shown to the nearest 1,000,000 but percentages are based on unrounded numbers.

As Figure 2 shows, the London and South East share of the film and video production workforce is consistently higher than the proportion for all UK industries, although this share fluctuates from year to year depending in part on the levels of production activity based in the capital and the surrounding major studios. Between 2010 and 2015, this has ranged from just under 65% in 2015 to just over 71% in 2013. In comparison the percentage of the total workforce based in London and the South East has remained stable at around 28%-29%.

Figure 2 London and South East percentage share of the film and video production and total workforce, 2010-2015



	2010	2011	2012	2013	2014	2015
Film and video production	66.7	70.8	70.9	71.3	69.3	64.6
UK all industries	28.1	28.5	28.7	29.0	29.1	29.2

Source: Office for National Statistics

THE SCALE OF THE WORKPLACE

Tables 6 to 8 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 6 to 8 are from the Inter-Departmental Business Register (IDBR), which is maintained by the Office for National Statistics. These data differ from the estimates shown in the previous sections, which are based on the Annual Population Survey (APS). The APS counts the number of people employed whereas the IDBR, 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 estimates arising from them should be similar. However, as the figures for 2015 show, 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 APS sample size at industry sub-sector level and the fact that there are two classification processes involved. In the APS, individuals are classified by industry depending on the industrial information they give, whereas in the IDBR the 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 APS and the IDBR measures.

In 2015, the film and video production sector had a very high number of workplaces with low numbers of employees. Workplaces with 1-10 employees accounted for 96% of all workplaces in the sector and almost half of its total workforce (46%), as Table 6 shows. At the other end of the scale, there were a small number of workplaces with a high number of employees. The 85 workplaces with 50 or more employees accounted for over 12,000 employees, an average of 147 each.

Table 6 Numbers of employees in film and video production by size of workplace for the UK, 2015

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	85	0.8	12,464	34.1
11 - 49	355	3.4	7,229	19.8
1 - 10	9,945	95.8	16,891	46.2
Total	**10,385**	**100.0**	**36,584**	**100.0**

Source: Office for National Statistics
Note: Percentages may not sum to 100 due to rounding.

Employment in the film and video distribution sector in 2015 was less concentrated in small workplaces than the production sector, with 81% of employees based in workplaces with 11 or more employees and 60% of employees based in workplaces with 50 or more employees (Table 7).

Table 7 Numbers of employees in film and video distribution by size of workplace for the UK, 2015

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	15	3.2	2,962	60.1
11 - 49	50	10.8	1,037	21.0
1 - 10	400	86.0	928	18.8
Total	**465**	**100.0**	**4,927**	**100.0**

Source: Office for National Statistics
Note: Percentages may not sum to 100 due to rounding.

Table 8 shows that the film exhibition sector had a concentration that was the reverse of the production sector, with 44% of employees in workplaces of 50 or more and only 4% in workplaces in the 1-10 employee band.

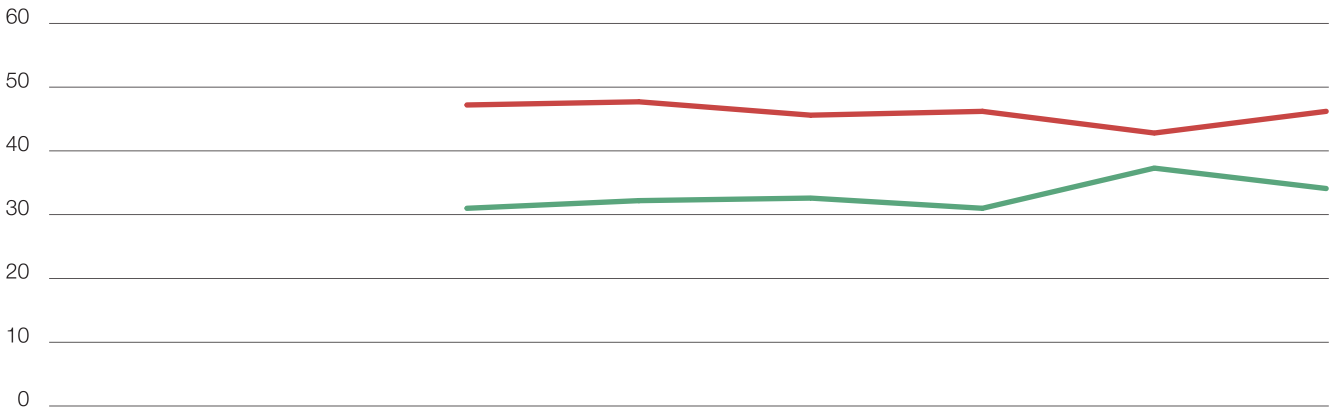
Table 8 Numbers of employees in film exhibition by size of workplace for the UK, 2015

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	110	17.5	8,091	43.7
11 - 49	350	55.6	9,743	52.6
1 - 10	170	27.0	676	3.7
Total	**630**	**100.0**	**18,510**	**100.0**

Source: Office for National Statistics
Note: Percentages may not sum to 100 due to rounding.

Figure 3 shows the percentage of employees in workplaces with 1-10 employees and the percentage in workplaces with 50 or more employees in the film and video production sector from 2010 to 2015. In 2010, 47% of the workforce was employed in workplaces with 1-10 employees and 31% of the workforce was employed in workplaces with 50 or more employees. Since then the proportion of the workforce based in the smallest workplaces has remained approximately the same at 46% while the proportion of employees in the largest workplaces has increased slightly to 34%.

Figure 3 Film and video production employees by workplace size band, percentage of total, 2010-2015

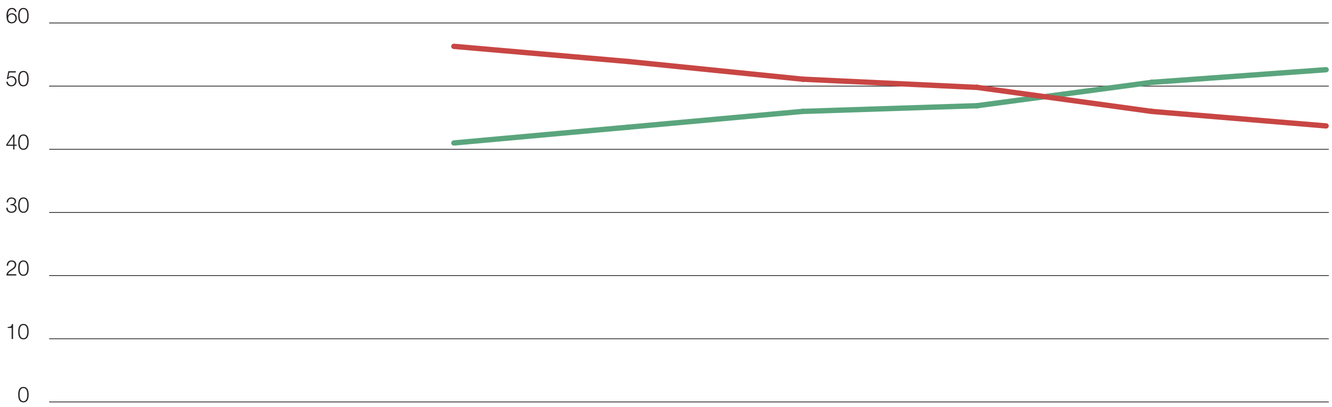


	2010	2011	2012	2013	2014	2015
50+ employees	31.0	32.2	32.6	31.0	37.3	34.1
1-10 employees	47.2	47.7	45.6	46.2	42.8	46.2

Source: Office for National Statistics

As Figure 4 shows, in the film exhibition sector the proportion of employees in workplaces with 50 or more workers has declined from 56% in 2010 to 44% in 2015. Conversely, the proportion of employees in workplaces with 11-49 employees has risen from 41% to 53% during the period.

Figure 4 Film exhibition employees by workplace size band, percentage of total, 2010-2015



	2010	2011	2012	2013	2014	2015
50+ employees	56.3	53.9	51.1	49.8	46.0	43.7
11- 49 employees	41.0	43.5	46.0	46.9	50.6	52.6

Source: Office for National Statistics

GLOSSARY

Alternative content
See Event cinema

Animation television programme
Within this Yearbook, the animation television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief an animation television programme must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, and at least 51% of its total core expenditure must be on animation

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)

BASE
British Association for Screen Entertainment, formerly the British Video Association. The trade body representing the interests of publishers and rights owners of pre-recorded home entertainment on digital and physical video (www.base.org.uk)

BBFC
British Board of Film Classification. Independent body responsible for classifying films and video. See Cinema film classification (www.bbfc.org.uk)

Blu-ray disc
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)

CAA
Cinema Advertising Association. The trade association of cinema advertising contractors operating in the UK and Republic of Ireland (www.cinemaadvertisingassociation.com)

Cash-in
A notification to an Examining Board that all units of a qualification (eg GCSE) have been completed and an overall grade should now be awarded

Children's television programme
Within this Yearbook, the children's television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief a children's television programme must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, at least 51% of its total core expenditure must be on live action, and its primary target audience will be under the age of 15

Cinema film classification
Classification given to a film by the British Board of Film Classification for a theatrical release. Indicates the film's suitability for audiences according to their age

Community cinema (community exhibition)
Voluntary providers of films bringing a variety of programming, often non-mainstream, to local communities which may have limited access to commercial cinemas

Concession revenue
Revenue from sales of food, drinks 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

Creative Europe
The European Commission's framework programme for support to the culture and audiovisual sectors. It replaced the Culture and MEDIA programmes which ran from 2007-2013

DCMS
Department for Culture, Media and Sport. The Government department responsible for setting UK film policy and for administering the National Lottery Distribution Fund (www.culture.gov.uk)

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 video
A term used by the BFI Research and Statistics Unit to describe Video on Demand (VoD), a system that allows users to stream or download a film from a digital platform to view on a television set, PC or mobile device. See Video on Demand

Digital video recorder (DVR)
A digital set-top box with hard drive capable of storing large amounts of audiovisual content. Sometimes referred to as Personal video recorder (PVR)

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 markets. Also undertakes the promotional and marketing activities to attract audiences to a film

Domestic box office
Typically refers to the USA and Canada box office and revenue from the films given theatrical release in this territory. See Local box office

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-to-own (DTO)
A type of Video on Demand business model which allows users to purchase 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). See Video on Demand

Download-to-rent (DTR)
A type of Video on Demand business model which allows users to download content to view within a limited time period (often up to 48 hours following the first play). See Video on Demand

DVD – Digital versatile disc
A digital optimal disc storage format capable of being viewed on different types of players

EEA spend
The value of all production expenditure, from pre-production to completion, on activity incurred in the European Economic Area

Electronic-sell-through (EST)
See Download-to-own (DTO)

English Regions
Formerly known as Government Office Regions (GORs) they were an administrative 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'

Event cinema
Also known as 'alternative content'. Non-feature film programming in cinemas, such as the live screening of events or performances happening elsewhere. Event cinema has become a regular feature of some UK cinemas in recent years, and has been made possible by the availability of digital projection

Exhibitor
A cinema operator that rents a film from a distributor to show to a cinema audience. See Film rental

Feature film
A film made for cinema release, rather than 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

Film tax relief
Tax relief on film production costs available for British qualifying films. To access the relief a film must qualify as British under the relevant cultural test or as an official co-production, with the intention of being released for theatrical exhibition

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

Genre
A style or category of film defined on the basis of common story and cinematic conventions (eg action, crime, drama, etc)

Global box office
See Worldwide box office

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 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

High-end television (HETV) programme
Within this Yearbook, the high-end television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief an HETV programme must qualify as British under the relevant cultural test or as an official co-production, it must be a drama (which includes comedy) or documentary intended for broadcast on television and/or the internet, and have an average core expenditure per hour of slot length of not less than £1 million. (The slot length in relation to HETV programmes must be greater than 30 minutes)

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

Intermediate (Scottish)
In Scotland, the Intermediate was one of the national secondary school certificate qualifications offered by the Scottish Qualifications Authority. These have been replaced by National Qualifications

Inward investment feature
A term used by the BFI Research and Statistics Unit to denote a feature 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 film tax relief

ISBA TV regions
System for classifying regions developed by the Incorporated Society of British Advertisers for use by the advertising industry (www.isba.org.uk)

Local box office
Typically describes a particular country or territory's box office and revenue from films given a theatrical release in that country or territory when referenced from the perspective of that country or territory. See Domestic box office

Mainstream programming
Category of films aimed at the general audience

Mbps
Megabits per second. A data transfer rate of one million bits per second

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

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

Mixed-use venue
An arts venue which screens films on a part-time basis alongside other activities such as concerts and plays

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, ITV, Channel 4 and Channel 5)

National Qualifications (Scottish)
In Scotland, the National Qualification are one of the secondary school certificate exams offered by the Scottish Qualifications Authority. These have replaced Intermediate and Standard Grade certificate qualifications. National Qualifications are usually taken by learners in the senior phase of secondary school (S4 to S6) and learners in colleges, including adult learners

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 TV
A satellite or cable television system in which viewers pay a subscription to access television content including feature films

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)
See Digital video recorder (DVR)

Physical video
Refers to the various physical formats on which video can be distributed, such as VHS, DVD, Blu-ray, etc

Post-production
All stages of film production occurring after the shooting of raw footage. These typically include: editing the picture, adding the soundtrack, adding visual special effects and sound effects and preparing a final cut

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

Pre-production
All stages of film production occurring once a film has been greenlit and before the shooting of raw footage. This typically includes: recruitment of crew, location scouting, set construction and scheduling

Producer
A film producer oversees and delivers a film project to all relevant parties while preserving the integrity, voice and vision of the film

Rental VoD
A type of Video on Demand business model which involves a one-off rental of an individual film title for a limited period of time, also known as download-to-rent (DTR). See Video on Demand

Sites
Individual cinema premises

Smart TV
A television set or set-top box connected to the internet that uses internet digital protocols to communicate data

Social group / Social grade
A section of the population defined by class group and employment status, based on a classification used by the Market Research Society. The 'AB' social group refers to people in the Upper Middle and Middle class groups, in higher and intermediate managerial jobs. The 'C1' social group refers to people in in the Lower Middle class group, with supervisory or junior managerial jobs. The 'C2' social group refers to people in the Skilled Working class group, who are categorised as skilled manual workers. The 'DE' social group refers to those in the Working class group or those at the lowest level of subsistence, who are semi-skilled manual workers, in receipt of a state pension, in casual employment or the lowest grade jobs

South Asian films
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

Specialised films
Generally, non-mainstream films. This category includes foreign language and subtitled films, feature documentaries, 'arthouse' productions and films aimed at niche audiences

Standard Industrial Classification (SIC)
A system used by the Office for National Statistics to classify businesses according to the type of their economic activity

Statistically significant
A finding that is the result of a quantitative investigation or data analysis that is unlikely to be due to chance

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

Studio-backed film
A film produced with creative and/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

Subscription VoD (SVoD)
A type of Video on Demand business model based on a subscription payment (usually monthly) in return for unlimited access to content. See Video on Demand

Terrestrial television
The five main free-to-air channels: BBC One, BBC Two, ITV, Channel 4 and Channel 5

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

Transactional VoD (TVoD)
A description of Video on Demand business models based on transactions of individual titles such as download-to-rent or download-to-own. See Video on Demand

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, 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; 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

UK spend
The value of production expenditure, from pre-production through to completion, on activity incurred in the UK for films and programmes applying for one of the creative sector tax reliefs as a UK qualifying production under the relevant cultural test. For films and programmes qualifying as British under one of the UK's bi-lateral treaties or (for films only) the European Convention on Cinematographic Co-production, the UK spend includes all production costs incurred by the UK production company

US studio
See studio-backed film

VFX
Visual effects. The various processes by which imagery is created and/or manipulated outside of live action material

Video game
Within this Yearbook, the video games referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. (Video games are defined by HMRC as electronic games that are played through a video device.) To access the relief a video game must qualify as British under the video games cultural test

Video on Demand (VoD)
A 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. VoD services in the UK employ three basic types of business model: transactional (TVoD) which includes rental VoD, a one-off rental, also known as download-to-rent (DTR), and retail or download-to-own (DTO), also known as electronic-sell-through (EST); subscription VoD (SVoD) unlimited access to content for a fixed monthly sum; and free/advert-supported VoD from catch up services. See Digital video

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

Worldwide box office
Refers to the box office across all global territories and total global box office revenues. Within this Yearbook, worldwide box office is used interchangeably with global box office

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Cinema For All
comScore
Creative Skillset
Department for Culture, Media and Sport (DCMS)
Digital Cinema Media
Dodona Research
European Audiovisual Observatory (EAO)
European Film Agency Research Network (EFARN)
Into Film
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Her Majesty's Revenue and Customs (HMRC)
Her Majesty's Treasury (HMT)
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Channel 4

Creative Europe Desk UK

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