

Film and other screen sector production in the UK, January - March (Q1) 2018

BFI Research and Statistics Unit

26 April 2018

1. Key points

- Total spend on film production in the UK in Q1 2018 was £386 million, the second highest since records began.
- Inward investment and co-production features contributed the highest UK spend with £346 million. Spend in the UK on domestic features was £40 million.
- Twenty five films started principal photography; 17 domestic UK features and 8 inward investment and coproduction features.
- Total production spend in the UK in the last 12 months (April 2017 – March 2018) was £1,709 million the second highest since records began.
- In Q1 2018, a total of 18 high-end television programmes started principal photography with a spend in the UK of £152 million.
- Of these, 12 were domestic programmes, with a UK spend of £98 million, and six were inward investment with a spend of £57 million.
- The spend on HETV production in the UK in the last 12 months was £933 million, the second highest since records began.

2. Film production in the UK

The total spend in the UK of feature films that started principal photography in Q1 2018 was £386 million, from 25 films (Table 1). Inward investment and co-production features accounted for the majority of this spend (£346 million), with domestic UK features accounting for £40 million.

Films which started principal photography during Q1 included; *Artemis Fowl*, *The Voyage of Doctor Dolittle* and *Detective Pikachu* which are inward investment films *Underdogs* a co-production and *Judy*, *Nativity Rocks!* and *Colin You Anus* which are domestic UK films.

It should be noted that due to the time lag in obtaining complete information on all low and micro-budget activity in the UK, data on the number and UK production spend of these films is likely to be revised upwards over time.

Table 1 Number and UK spend of features produced in the UK, Q1 2018

	UK spend £ million	Number of features
Domestic UK features	39.9	17
Inward investment and co-productions	345.9	8
Total	385.8	25

Source: BFI

Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.

Films are allocated to the calendar quarter in which principal photography started.

Totals may not sum due to rounding.

In the rolling 12 month period April 2017 to March 2018, total spend on film production in the UK was £1,709 million (Table 2)– a decrease of 15% on the record high of April 2016 to March 2017 making it the second highest recorded figure since analysis began in 2002. This spend was drawn from 234 films (Table 3).

A breakdown of the total shows 56 inward investment features contributed 84% of total spend (£1,693 million); whilst a drop from the previous rolling year this is the second highest UK Spend figure since analysis began. Domestic UK features contributed £240 million, with £224 million spent by films with a budget of £500,000 and above. Co-productions contributed £29 million from 18 films, the lowest recorded figure in this time series and continuing a downward trend over the past four years.

Table 2 UK spend of features produced in the UK, 2011/12 to 2017/18, £ million

	Rolling years: April - March						
	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Co-productions	48.3	69.2	69.3	56.7	42.7	35.1	29.4
Domestic UK features	247.3	213.1	284.6	152.5	269.0	291.2	239.8
<i>Of which budget</i>							
<i>≥ £500,000</i>	226.5	192.9	260.6	126.7	246.1	273.7	223.7
<i>Of which budget</i>							
<i>< £500,000</i>	20.8	20.2	23.9	25.8	22.9	17.5	16.1
Inward investment features	851.6	676.3	1,032.7	1,389.3	1,287.4	1,676.2	1,439.8
Total without films with budgets <£500,000*	1,124.3	936.2	1,360.7	1,570.0	1,574.2	1,983.4	1,692.5
Total	1,147.2	958.6	1,386.6	1,598.5	1,599.1	2,002.5	1,709.0

Source: BFI

Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.

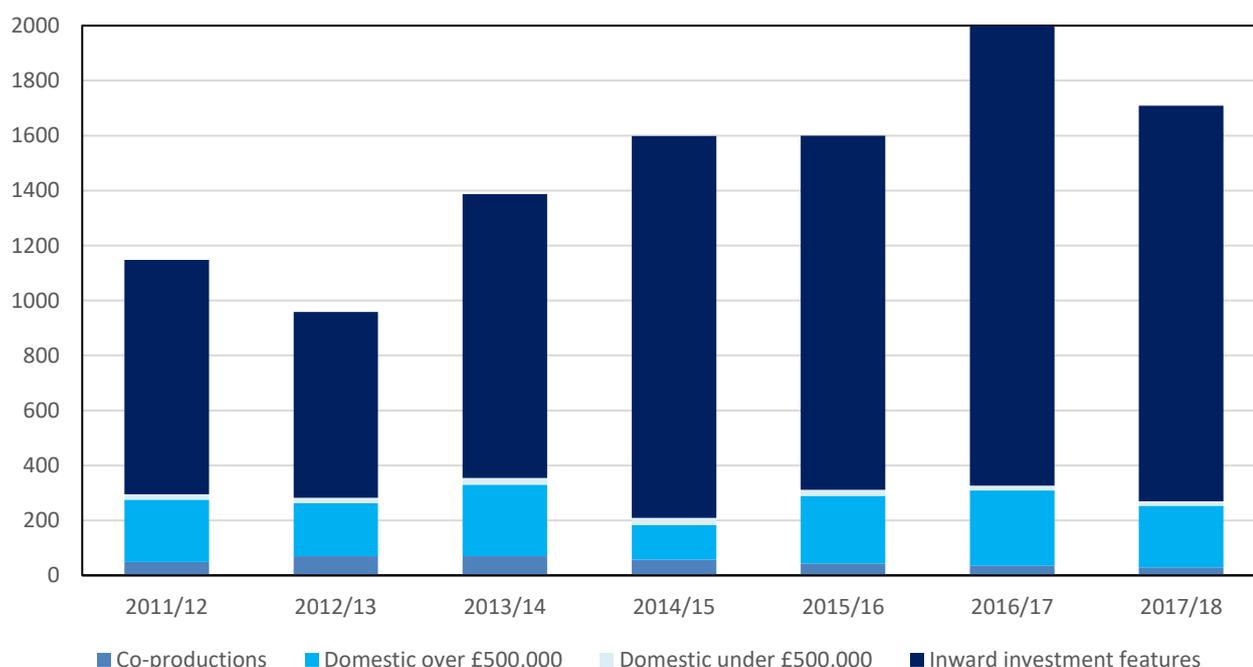
Films are allocated to the calendar quarter in which principal photography started.

*This refers to all films with a production spend <£500,000 in the UK, not just Domestic UK features.

Totals may not sum due to rounding.

Figures for the most recent Rolling Year (2017/18) are very likely to be amended upwards in future as more data becomes available.

Figure 1 UK spend of features produced in the UK, 2011/12 to 2017/18, £ million



Source: BFI

Films are allocated to the calendar quarter in which principal photography started.

Figures for the most recent Rolling Year (2017/18) are very likely to be amended upwards in future as more data becomes available.

There were 234 films that started principal photography in the UK in the rolling year from April 2017 to March 2018 (Table 3 and Figure 2). Although this is the lowest figure in the analysed range, this figure is likely to be revised upwards in future. This is because there is a lag in obtaining complete data for domestic UK features with a budget of less than £500,000.

The number of co-productions has decreased as it did in the previous rolling year (2016/17), and the number of inward investment features has declined from the previous rolling year which was a record high.

For comparison the number of films reported in the equivalent Statistical Bulletin last year ([Film and other screen sector production in the UK, January - March \(Q1\) 2017](#)) was 209 films.

It is likely that this year's total of 234 will be revised upwards therefore it is not necessarily direct evidence of a decline in the production of domestic features in the UK.

Table 3 Number of features produced in the UK, 2011/12 to 2017/18

	Rolling years: April - March						
	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Co-productions	43	42	61	43	33	26	18
Domestic UK features	293	267	277	240	235	195	163
<i>Of which budget ≥ £500,000</i>	95	72	82	73	89	83	70
<i>Of which budget < £500,000</i>	198	195	195	167	146	112	93
Inward investment features	41	44	39	63	59	77	53
Total without films with budgets <£500,000*	155	133	156	161	161	175	137
Total	377	353	377	346	327	298	234

Source: BFI

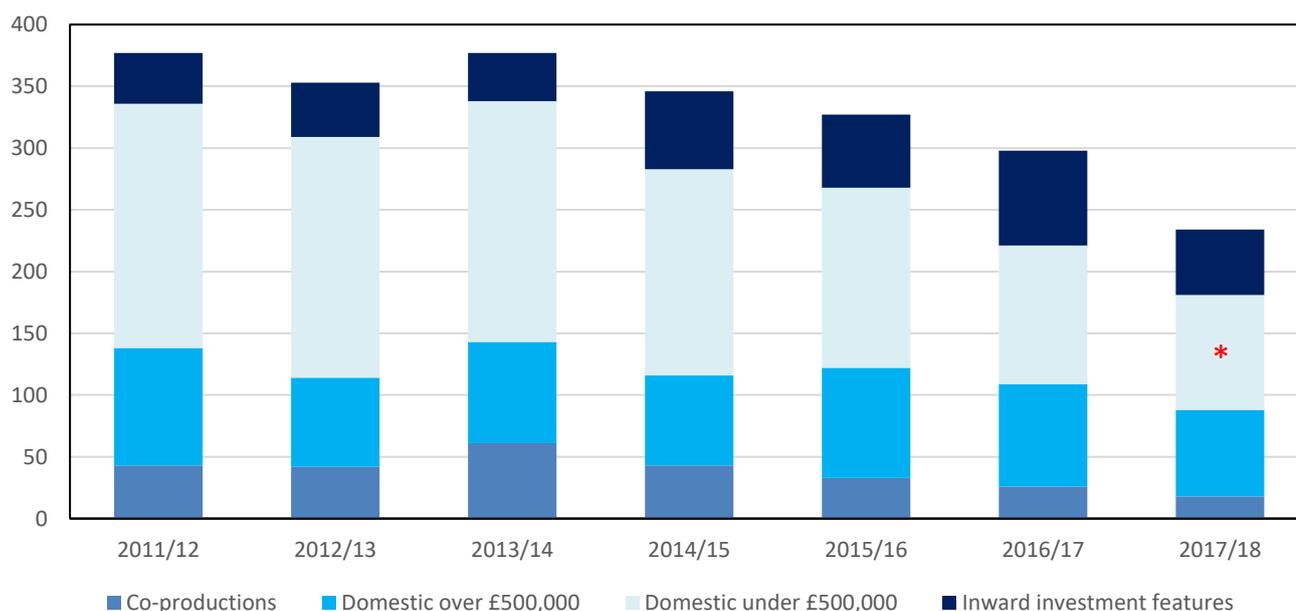
Films are allocated to the calendar quarter in which principal photography started.

*This refers to all films with a production spend <£500,000 in the UK, not just Domestic UK features.

Totals may not sum due to rounding.

Figures for the most recent Rolling Year (2017/18) are very likely to be amended upwards in future as more data becomes available.

Figure 2 Number of features produced in the UK, 2011/12 to 2017/18



Source: BFI

Films are allocated to the calendar quarter in which principal photography started.

* Figures for the most recent Rolling Year (2017/18) are very likely to be amended upwards in future as more data becomes available.

3. High-end television production in the UK

Eighteen high-end television programmes (HETV) started principal photography in the first quarter of 2018, with a total spend in the UK of £152 million. Titles included *Curfew*, *Little Drummer Girl*, *The War of the Worlds* and *Black Mirror - Series 5*.

Domestic HETV programmes accounted for 64% of spend in the UK (£96 million) with Inward Investment HETV accounting for 36% (£57 million) (Table 4).

Table 4 Number and UK spend of high-end television programmes produced in the UK, Q1 2018

	UK spend £ million	Number of programmes
Co-production	-	-
Domestic UK	95.7	12
Inward Investment	56.5	6
Total	152.1	18

Source: BFI

Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.

HETV are allocated to the calendar quarter in which principal photography started.

Totals may not sum due to rounding.

These statistics report on high-end television programmes (HETV) from April 2013 onwards only, because HETV production tracking started in line with the completion of the legislation procedures for the HETV tax relief in August 2013 (although the relief was applicable to production spend and backdated to 1 April 2013).

Across the last four rolling years the total spend in the UK has consistently risen, in 2013/14 it was £612 million rising to £981 million in 2016/17 with a slight drop to £933 million in the most recent rolling year (April 2017 to March 2018). Inward investment and co-productions made up 69% of spend in the UK, while domestic UK productions accounted for 31% (Table 5).

Table 5 UK spend of high-end television programmes produced in the UK, Rolling Years: April- March

	2013/14	2014/15	2015/16	2016/17	2017/18
Domestic UK	283.1	349.8	362.4	372.2	285.8
Inward investment and co-production	329.1	314.3	393.7	608.8	647.2
Total	612.3	664.1	756.1	981.0	933.0

Source: BFI

HETV are allocated to the calendar quarter in which principal photography started.

Inward investment and co-production have been combined to avoid disclosing budgets for individual productions.

Totals may not sum due to rounding.

Figures for the most recent Rolling Year (2017/18) are very likely to be amended upwards in future as more data becomes available.

Between 2013/14 and 2015/16, the number of HETV productions rose from 72 to 118 in 2016/17 with a drop to 89 in the latest rolling year (April 2017 to March 2018). Domestic UK productions accounted for 48% of productions in the UK while inward investment and co-productions made up 52% (Table 6).

This drop in the number of productions reported is partially attributable to a lag in sourcing information on productions with smaller budgets, as such it is highly likely that this year's total of 89 will be revised upwards therefore it is not necessarily direct evidence of a decline in the production of HETV programmes in the UK.

Table 6 Number of high-end television programmes produced in the UK, Rolling Years: April- March

	2013/14	2014/15	2015/16	2016/17	2017/18
Domestic UK	52	61	65	70	44
Inward investment and co-production	20	35	25	48	45
Total	72	96	90	118	89

Source: BFI

HETV are allocated to the calendar quarter in which principal photography started.

Inward investment and co-production have been combined to avoid disclosing budgets for individual productions.

Totals may not sum due to rounding.

Figures for the most recent Rolling Year (2017/18) are very likely to be amended upwards in future as more data becomes available.

Notes

1. BFI Research and Statistics Unit production tracking

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

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

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

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

For high-end television, only programmes officially certified as British are included.

2. Revisions

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

Statistics on **Video Games, Television Animation and Children's Television** will be reported in the release: British film and other screen sectors certification Q1 2018 (Publication Date; 3rd May 2018).

3. Definitions

A **domestic** (indigenous) UK production is a feature film, HETV programme or television animation programme made by a UK production company that is produced wholly or partly in the UK.

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

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

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

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

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

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

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

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

Within this release the **High-end television** (HETV) 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 is a drama (which includes comedy) or documentary production that must be 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)

4. Disclosing individual film information

Spend data are not disclosed when the number of productions (co-production, domestic or inward) is five or fewer.

5. Feedback

We welcome feedback from users of our statistics releases to help us improve what we do. If you have any feedback on these statistics or if you wish to make a complaint, in the first instance please contact us using the named contact details listed below

6. Pre-release Access

This release has been prepared according to the Code of Practice for Official Statistics published by the UK Statistics Authority (2018). No persons have received pre-release access to this report.

7. Statistical contact details

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