

Film, high-end television and animation programmes production in the UK – Q1 2014

BFI Research and Statistics Unit

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1. Key Points

- Since the introduction of tax relief in April 2013 for high-end television programmes and animation programmes, this is the first time a full year's data is available for high-end television and animation programmes and the only time this time period (April 2013 – March 2014) will be presented in addition to Q1 2014 data. Q1 statistics are presented for consistency reasons.
- Total UK spend for film in Q1 2014 was £249 million, from 51 films, the highest spend since Q1 2011.
- Inward investment features contributed the highest UK spend with £151 million; UK spend on domestic features came to over £84 million.
- UK spend for high-end television in April 2013 – March 2014 was £395 million from 43 productions; UK spend for animation in the same period was £45 million from 25 productions.

2. Film production in the UK in Q1 2014

The aggregate UK spend of feature films that commenced principal photography in the first quarter of 2014 was £249 million, up from £92 million in Q1 2013 (Table 1 and Figure 1). Inward investment features contributed the highest UK spend, with £151 million; this is the highest amount since 2011. Co-production UK spend was higher than Q1 2013, at £13 million, but was the lowest UK spend of the three main categories of productions. Domestic features contributed £84 million, of which over £82 million was from films with budgets of £500,000 or more and almost £2 million from those with budgets of less than £500,000. This is the lowest amount Q1 total for domestic films with budgets under £500,000 for the period shown and it may be due to a time lag in obtaining complete information on all low and micro-budget activity in the UK in Q1 2014; as such this figure may be revised.

Table 1 UK spend of features produced in the UK in Q1 2008–Q1 2013, £ million

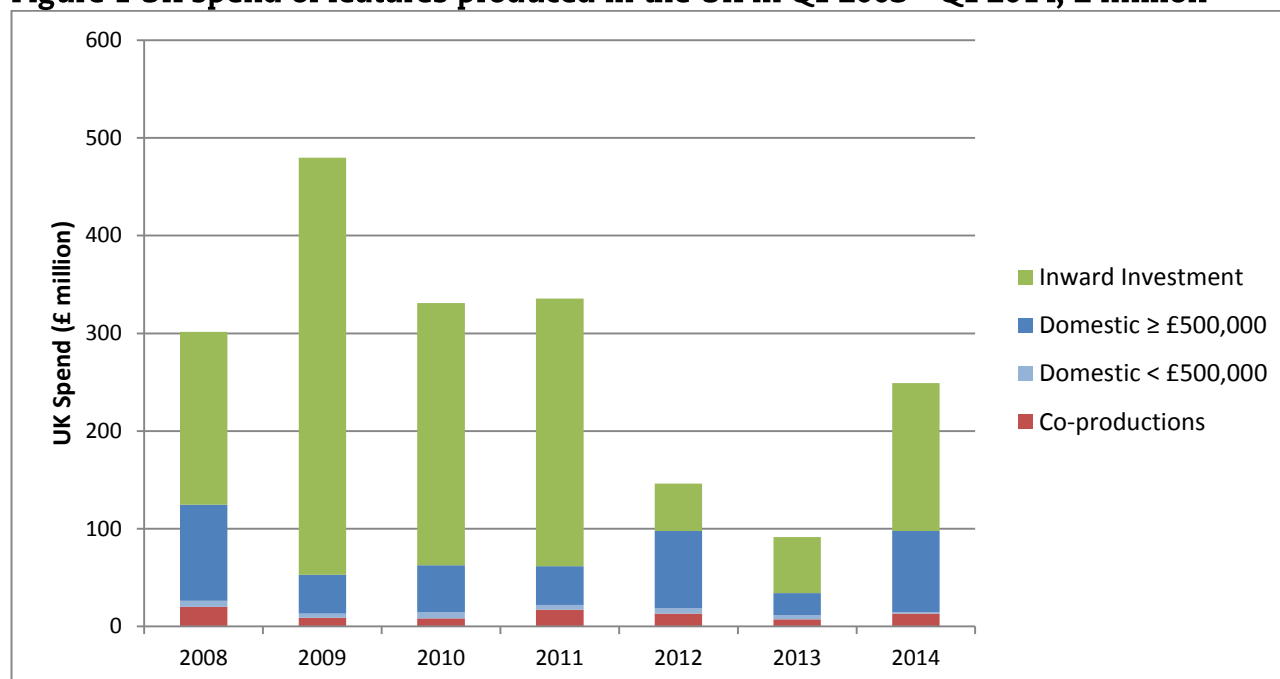
	Q1 2008	Q1 2009	Q1 2010	Q1 2011	Q1 2012	Q1 2013	Q1 2014
Co-productions	20.0	9.1	8.2	17.0	13.3	7.2	13.2
Domestic UK features	104.5	43.7	54.5	44.7	84.5	27.0	84.4
Of which budget ≥ £500,000	98.3	39.5	48.1	39.7	79.0	22.7	82.6
Of which budget < £500,000	6.1	4.2	6.4	5.1	5.5	4.3	1.8
Inward investment features	177.0	426.8	268.2	273.9	48.2	57.3	151.4
Total	301.5	479.5	331.0	335.7	146.1	91.5	249.0

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 commenced.

Figure 1 UK spend of features produced in the UK in Q1 2008 – Q1 2014, £ million



Source: BFI
Films are allocated to the calendar quarter in which principal photography commenced.

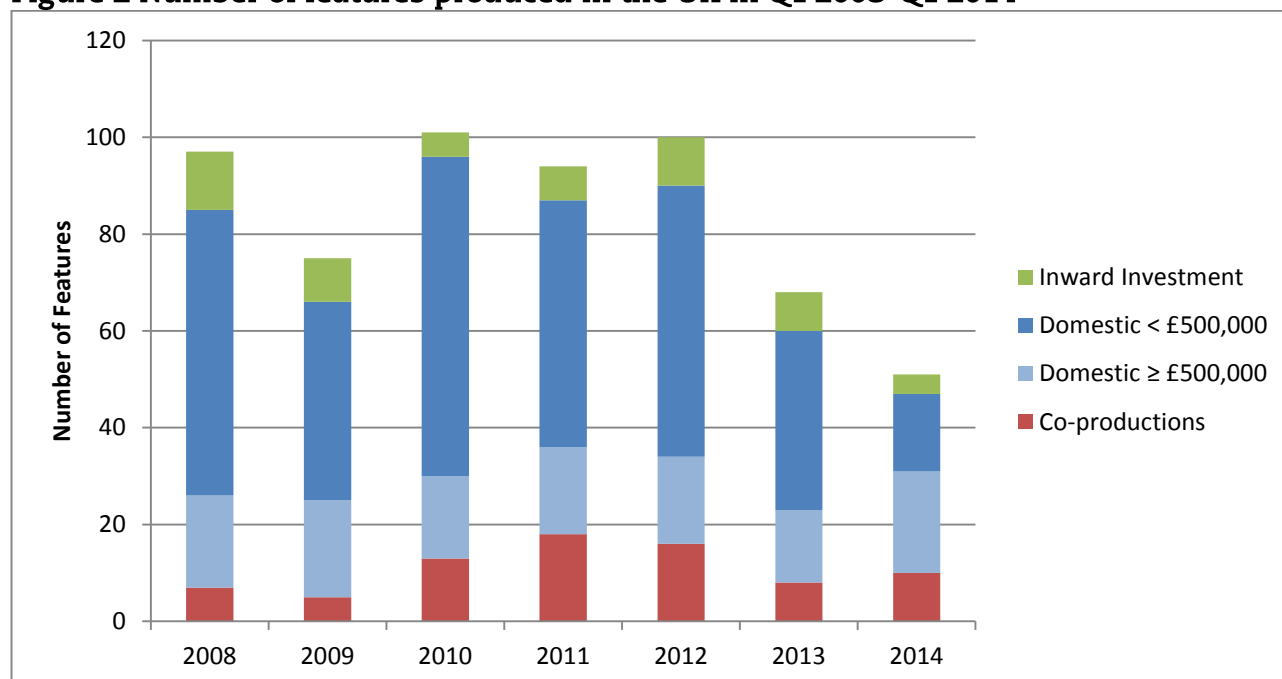
There were 51 films that commenced principal photography in the UK in Q1 2014, the lowest of the time period. Q1 2010 had the highest number of films that commenced principal photography with 101 films. For Q1 2014, 10 films were co-productions (an increase on Q1 2013), 37 were domestic UK features and four were inward investment films (Table 2 and Figure 2). For domestic features, 21 films had budgets of £500,000 or more and 16 were films with budgets under £500,000. The numbers of domestic and inward investment features were the lowest of the time period; this may be due to a time lag in obtaining complete information on all production activity in the UK in Q1 2014, in particular for low budget films, and maybe revised.

Table 2 Number of features produced in the UK in Q1 2008 – Q1 2014

	Q1 2008	Q1 2009	Q1 2010	Q1 2011	Q1 2012	Q1 2013	Q1 2014
Co-productions	7	5	13	18	16	8	10
Domestic UK features	78	61	83	69	74	52	37
Of which budget ≥ £500,000	19	20	17	18	18	15	21
Of which budget < £500,000	59	41	66	51	56	37	16
Inward investment features	12	9	5	7	10	8	4
Total	97	75	101	94	100	68	51

Source: BFI
Films are allocated to the calendar quarter in which principal photography commenced.

Figure 2 Number of features produced in the UK in Q1 2008–Q1 2014



Source: BFI
Films are allocated to the calendar quarter in which principal photography commenced.

Titles commencing principal photography in Q1 2014 included *Avengers: Age of Ultron*, *Brooklyn*, *Sunset Song*, *Get Santa*, *Suffragette* (also known as *The Fury*) *The Singing Hospice* and *Journey to Le Mans*.

3. High-end television – British productions and co-productions

It has been a year since tax relief was introduced for high-end television programmes (HETV). In this release, statistics for April 2013 - March 2014 are reported to show a full year's data in addition to statistics for Q1 2014. Please note that these time periods overlap and that Q1 2014 data are also included in data for April 2013 – March 2014.

The UK spend for HETV for April 2013 – March 2014 was almost £395 million. Domestic and co-production HETV contributed £170 million and inward investment HETV contributed almost £225 million. For disclosure reasons, the UK spend and co-productions have been combined (Table 3).

A total of 43 HETV programmes commenced principal photography in April 2013 – March 2014. Of these, 27 were domestic HETV, three were co-productions and 13 were inward investment.

Table 3 UK spend and number of high-end television programmes produced in the UK, April 2013 – March 2014

	UK spend £m	Number
Co-production	170.0*	3
Domestic UK HETV		27
Inward Investment HETV	224.7	13
Total	394.8	43

* Aggregate UK spend for co-production and domestic UK HETV HETV are allocated to the period according to the date principal photography commenced.

The UK spend for HETV for Q1 2014 was over £131 million (Table 4). The majority of this came from inward investment HETV, which contributed £74 million. Domestic HETV contributed over £57 million. No co-productions started principal photography in this period.

A total of 12 HETV programmes commenced principal photography in January – March 2014. Of these, eight were domestic HETV and four were inward investment.

Table 4 UK spend and number of high-end television programmes produced in the UK, Q1 2014

	UK spend £m	Number
Co-production	-	-
Domestic UK HETV	57.5	8
Inward Investment	73.9	4
Total	131.4	12

Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown. HETV are allocated to the period according to the date principal photography commenced.

4. Animation programmes – British productions and co-productions

As with HETV, it has been a year since tax relief was introduced for animation programmes (ANM). In this release, statistics for April 2013 - March 2014 are reported to show a full year's data in addition to statistics for Q1 2014. Please note that these time periods overlap and that Q1 2014 data are also included in data for April 2013 – March 2014.

The UK spend for ANM for April 2013 – March 2014 was over £45 million. The majority of this came from domestic ANM, which contributed £37 million. UK spend for inward investment was less than for domestic, at almost £8 million. As with HETV, the UK spend for co-productions is not reported for disclosure reasons (Table 5).

A total of 25 animation programmes commenced principal photography in the first year of tax relief. Of these 19 were domestic ANM, four were inward investment HETV and two were co-productions. Unlike feature films and HETV, the small number of inward investment productions did not account for the largest share of UK spend.

Table 5 UK spend and number of television animation programmes produced in the UK, April 2013 – March 2014

	UK spend £m	Number
Co-production	43.9*	2
Domestic UK ANM		19
Inward Investment	7.8	4
Total	51.7	25

* Aggregate UK spend for co-production and domestic UK HETV.

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

Animation programmes are allocated to the period according to the date principal photography commenced.

For ANM for Q1 2014, two domestic ANM have commenced principal photography; no co-productions or inward investments have started production. The UK spend is not reported for disclosure reasons.

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 and television animation programmes, only programmes officially certified as British are included.

While the Research and Statistics Unit make every effort to ensure the reliability of the data contained within this release, classifications are occasionally made on the basis of incomplete or inaccurate data. If you have concerns about the quality of the estimates in this release, please let us know using the contact details below. See also 2. Revisions.

2. Revisions

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

3. Definitions

A **domestic** (indigenous) UK 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.

4. Disclosing individual film information

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

Pre-release Access

This release has been prepared according to the Code of Practice for Official Statistics published by the UK Statistics Authority (2009). Pre-release access has been granted to the following:

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