

Film and high-end television production in the UK, January - September (Q1-Q3) 2019

BFI Research and Statistics Unit

7th November 2019

1. Key points

- Total spend on film production from Q1 to Q3 2019 was £1.5 billion from 120 films.
- Inward investment features UK spend was £1.36 billion. Spend on domestic features was £135 million and co-production total was £27 million.
- 120 films started principal photography during the first nine months of the year; 47 inward investment features, 56 domestic UK features, and 17 co-productions.
- Total film production spend in the UK in the 12 months October 2018 to September 2019 was £1.8 billion. The total film production spend for the 12 month period October 2017 to September 2018 was £1.86 billion.
- In the first nine months of 2019, a total of 101 high-end television programmes (HETV) started principal photography with a total UK spend of £1.55 billion, the highest since records began.
- Of these HETV productions, 63 were inward investment and co-productions with a total UK spend of £1.22 billion. 38 were domestic programmes, with a total budget of £331 million.
- The spend on HETV production in the UK over the rolling year October 2018 to September 2019 was £1.84 billion. This is also the highest UK HETV production spend for the rolling September to October period since reporting began.

2. Film production in the UK

The aggregate UK spend of feature films starting principal photography in Q1-Q3 was £1.5 billion from 120 films (Table 1). There were 47 inward investment productions with a total spend of £1.36 billion, representing 89% of the total UK film production budgets.

56 domestic features accounted for £135 million of the total UK film production spend. In the first nine months, 31 domestic features with a UK budget of £500,000 or more started principal photography. Spend on productions with budgets less than £500,000 was £5 million. Note that production spend for lower budget domestic films is likely to be revised upwards due to a time lag in gaining full information on this area of production activity. Co-productions accounted for £27 million of spend (spread across 17 productions). This is an increase of 30% versus the Q1-Q3 2018 co-production UK spend.

Films which started principal photography during the third quarter of the year included Disney's live action prequel *Cruella* starring Emma Stone and Emma Thompson; the biopic *Louis Wain* directed by Will Sharpe and starring Claire Foy and Benedict Cumberbatch; *After Love*, the Joanna Scanlan starring drama; *Pixie*, directed by Barnaby Thompson and starring Olivia Cooke and Alex Baldwin filmed in Northern Ireland; and *The Power* directed by Corinna Faith and starring Rose Williams.

Table 1 Number and UK spend of features produced in the UK, Q1-Q3 2019

	UK spend £ million	Number of features
Co-productions	27.1	17
Domestic UK features	134.8	56
Of which budget ≥ £500,000	129.4	31
Of which budget < £500,000	5.4	25
Inward investment	1,362.4	47
Total	1,511.3	120

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.

Inward investment features include films with visual effects (VFX) post production in the UK

In the rolling 12 month period October 2018 to September 2019, total spend on film production in the UK was £1.8 billion. The production spend reported in the equivalent Q 3 2018 Statistical Release was £1.65 billion (which has been subsequently updated to £1.86 billion with additional tracking information).

The total UK budget for inward investment features, that is film productions which may be creatively controlled outside the UK, but which can also include UK financing in addition to UK spend attracted from elsewhere - was £1.57 billion or 86% of total spend. The equivalent budget in the Q3 2018 Statistical Release was £1.37 billion. Domestic production spend was £200 million, with 96% or £191 million coming from domestic films with a budget of £500,000 or more. Co-production spend was £31 million, par with the £32.5 million spend recorded for the same production category the previous year.

Table 2 UK spend of features produced in the UK, Rolling Year 2012/13 to 2018/19, £ million

	Rolling Years: Oct-Sep £m						
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Co-productions	56.0	61.1	49.7	40.9	28.0	32.5	31.2
Domestic UK features	246.5	242.6	220.2	278.3	367.2	283.6	199.8
Of which budget ≥ £500,000	222.1	218.9	192.3	254.9	344.0	266.6	191.0
Of which budget < £500,000	24.4	23.7	28.0	23.4	23.3	17.0	8.8
Inward investment features	850.5	1,088.28	1,363.02	1,512.76	1,976.85	1,542.72	1,571.25
Total without films with budgets <£500,000*	1,126.2	1,366.0	1,602.5	1,807.8	2,347.3	1,840.9	1,793.1
Total	1,153.0	1,392.0	1,632.9	1,832.0	2,372.1	1,858.8	1,802.2

Source BFI

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

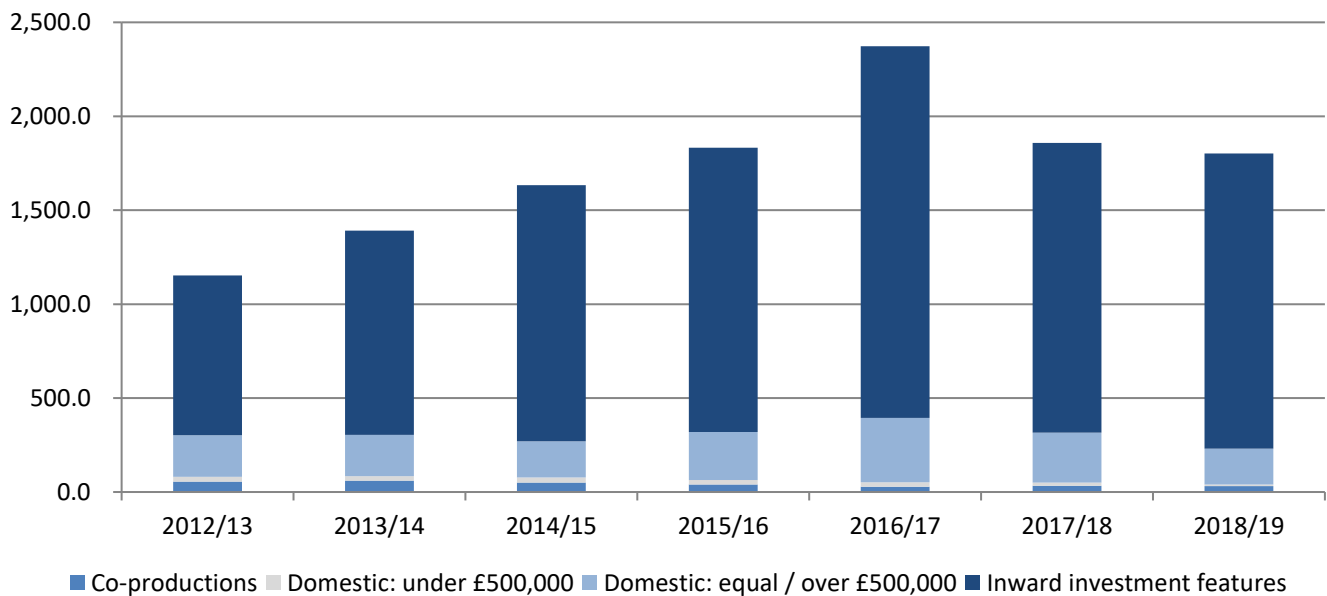
Films are allocated to the calendar quarter in which principal photography started.

*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 (2018/19) are very likely to be amended upwards in future as more data becomes available. See [Appendix 1](#) for more detail

Figure 1 UK spend of features produced in the UK, Rolling Year 2012/13 to 2018/19, £ million



Source: BFI

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

Figures for the most recent Rolling Year (2018/19) are very likely to be amended upwards in future as more data becomes available. See [Appendix 1](#) for more detail

A total of 175 features started principal photography in the rolling year October 2018 to September 2019 (Table 3 and Figure 2). This is the lowest figure in the reported time series, however the current year's figures are interim and this value is likely to be revised upwards. For comparison, the number of films accounted for in the equivalent Statistical Release last year was 179, and that has since been revised upwards to 250. Please see [Appendix 1](#) for a more detailed comparison.

There has been an increase in the volume of inward investment features, with 61 features going into production in the rolling year 2018/19, an increase of 9 on the 52 films starting photography in the 2017/18 time period. As already noted, reported inward investment production volume is likely to increase as further production tracking information becomes available.

The total number of domestic features going into production was 94. This compares to 176 domestic features reported for the previous 12 month rolling period. Note that the volume reported in the equivalent Q3 2018 Statistical Release was 125, which increased by 51 titles with additional reporting information. 20 co-productions started principal photography over the 2018 / 2019 rolling year, 2 more productions than was reported in the 2018 Q3 release.

Table 3 Number of features produced in the UK, 2012/13 to 2018/19

	Rolling Years: Oct-Sep £m						
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Co-productions	51	48	45	27	22	22	20
Domestic UK features	272	262	261	249	244	176	94
<i>Of which budget</i>							
≥ £500,000	75	85	88	89	95	88	53
< £500,000	197	177	173	160	149	88	41
Inward investment features	44	46	66	61	86	52	61
Total without films with budgets <£500,000*	142	160	178	167	193	157	131
Total	367	356	372	337	352	250	175

Source: BFI

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

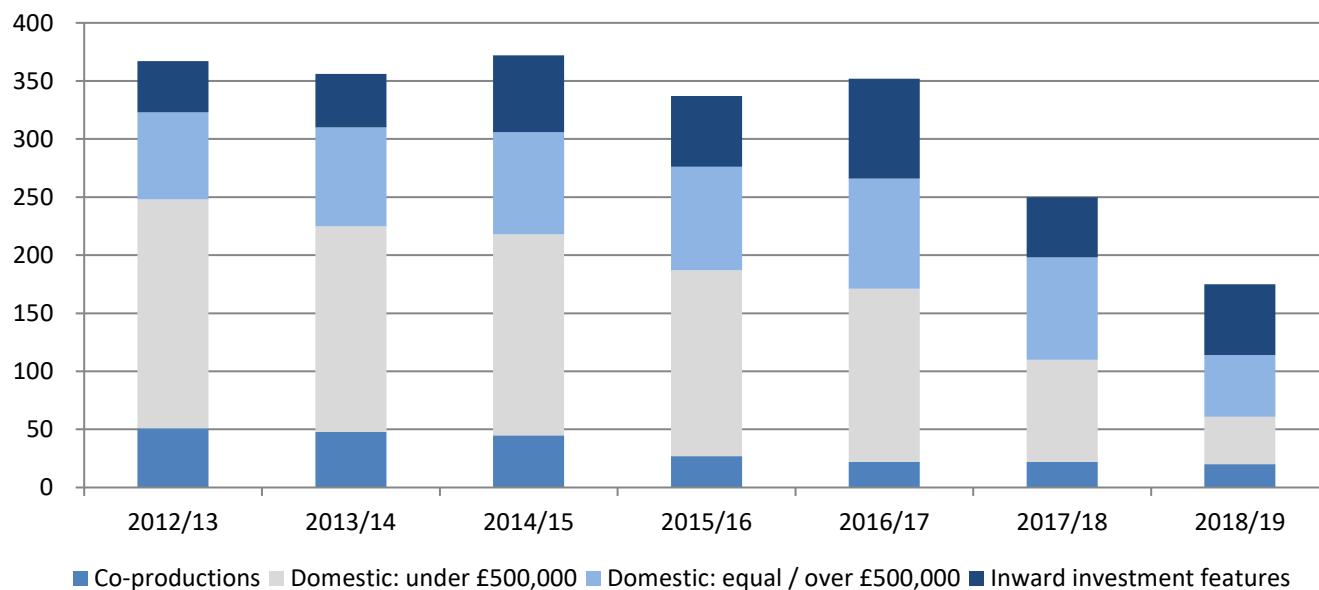
*This refers to all films with a production spend <£500,000 in the UK, not just domestic UK features.

Totals may not sum due to rounding.

Figures for the most recent Rolling Year (2018/19) are very likely to be amended upwards in future as more data becomes available. See [Appendix 1](#) for more detail

Inward investment features include films with visual effects (VFX) post production in the UK

Figure 2 Number of features produced in the UK, 2012/13 to 2018/19



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. See [Appendix 1](#) Figure A for more detail

3. High-end television production in the UK

A total of 101 high-end television (HETV) programmes started principal photography during Q1-Q3 2019. Their total UK spend value was £1.55 billion (Table 4). The number and total spend of HETV productions in the equivalent 2018 Statistical Release was 76 with a total spend of £0.76 billion. These values have since been updated (with additional tracking information) to 112 productions with a UK spend of just over £1 billion. The Q1-Q3 2019 UK production spend value is the largest Q1-Q3 spend figure reported since the introduction of the high-end television tax relief in 2013.

Inward investment and co-production HETV programmes accounted for 79% (£1.2 billion) of the total HETV UK spend. The inward investment and co-production spend for 2018 was £0.64 billion. Domestic high-end TV spend was £331 million (from 38 productions). This is a 30% increase on the £253 million domestic UK production spend reported in the equivalent 2018 release (from 35 productions),

There were 61 inward investment productions and 2 co-productions going into production during Q1-Q3 compared to 57 for the same period last year. Productions which started principal photography during Q3 included the fourth series of *The Crown*, Sky's sci-fi drama *Intergalactic*, and the BBC adaptation of David Nicholl's best-selling novel *Us*.

Table 4 Number and UK spend of high-end television programmes produced in the UK, Q1-Q3 2019

	UK spend £ million	Number of programmes
Domestic UK	330.6	38
Inward investment and co-productions	1,220.5	63
Total	1,551.1	101

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.

The UK spend for the 12 months October 2018 to September 2019 was £1.84 billion (Table 5). This is the highest HETV production spend recorded since reporting began.

Inward investment has driven this growth, with the total UK spend for inward investment/co-productions reaching £1.43 billion, compared to £0.98 billion for the same period the previous year, representing a 46% year-on-year growth. Whilst the inward investment and co-production numbers have been combined to avoid disclosure of specific budgets, it should be noted that the vast majority of this category spend is from inward investment productions.

Domestic HETV production spend was £410 million for the 12 months 2018/2019 compared to £458 million for the 2017/2018 12 month period (-11%). The 2018/2019 UK spend total is the second highest recorded for this reporting period, and is likely to be revised upwards when with further tracking information becomes available (the Q3 2018 Statistical Release value for domestic spend was £314 million).

Table 5 UK spend of high-end television programmes produced in the UK, 2013/14 – 2018/19

	Rolling Year: Sep-Oct £m					
	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Domestic UK	347.2	391.4	378.3	320.7	457.9	409.07
Inward investment and co-production	336.0	386.7	521.0	617.4	980.3	1,431.9
Total	683.3	778.0	899.3	938.1	1,438.2	1,840.9

Source: BFI

HETV productions 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.

A total of 129 high-end television programmes started filming during the period October 2018 to September 2019. The number of inward investment and co-production productions increased from 70 to 77 year-on-year with 4 co-productions also starting principal photography during the period. 52 domestic UK productions accounted for 40% of productions (Table 6). As with film data, the number of productions is expected to increase for this period as additional production information becomes available (there were 44 UK domestic productions reported in the equivalent 2018 Statistical Release, since revised to 68).

Table 6 Number of high-end television programmes produced in the UK, 2013/14 – 2017/18

	Rolling Year: Sep-Oct					
	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Domestic UK	59	67	67	62	68	52
Inward investment and co-production	33	27	36	57	70	77
Total	92	94	103	119	138	129

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.

Appendix 1

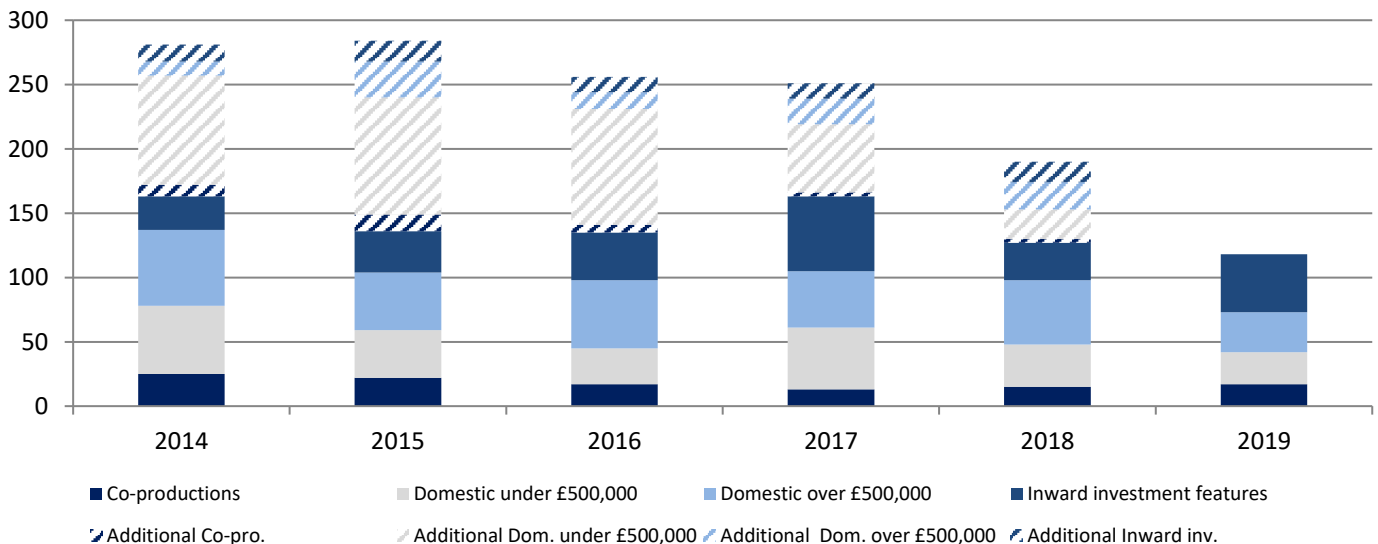
Data collected for the quarterly and half-year statistical releases is interim as there is time-lag in data reporting relating to the collation of all production spend figures. This is particularly the case for film production reporting. Table A below shows data for the annual Q1-Q3 period as it was published in production statistics of that given year to allow a direct comparison of the slate of films starting principal photography in each year as identified at the end of Q3 in any given year

Table A Number of film features produced in the UK, 2012/13 to 2018/19 as published in Q1-Q3 stats of that year.

	Q1-Q3					
	2014	2015	2016	2017	2018	2019
Co-productions	25	22	17	13	15	17
Domestic UK features	112	82	81	92	83	56
Of which budget < £500,000	53	37	28	48	33	25
Of which budget ≥ £500,000	59	45	53	44	50	31
Inward investment features	26	32	37	58	29	47
Total	163	136	135	160	127	120

Figure A displays the numbers as reported from Table A with updated data reported later displayed above the base data. The figure visually demonstrates the lag dynamic in obtaining complete data, and how the data in this report for 2019 should be regarded as interim, especially relevant when looking at domestic UK features with a budget of less than £500,000.

Figure A Number of film features produced in the UK, 2015 to 2019



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.

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.

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.

Within this release the **High-end television** (HTV) programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief an HTV 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 HTV 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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