Film and other screen sector production in the UK, January – June (H1, Half Year) 2018

BFI Research and Statistics Unit

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1. Key points

- Total spend on film production in the UK in H1 2018 was £936 million.
- Inward investment features contributed the highest UK spend with £752 million. Spend in the UK on domestic features was £178 million.
- Seventy-one films started principal photography; 18 inward investment features, 47 domestic UK features, and 6 co-productions.
- Total production spend in the UK in the last 12 months (July 2017 – June 2018) was £1,858 million.
- In H1 2018, a total of 48 high-end television programmes started principal photography with a spend in the UK of £486 million, the highest since records began.
- Of these, 25 were inward investment programmes with a UK spend of £316 million and 23 were domestic programmes, with a UK spend of £171 million.
- The spend on HETV production in the UK in the last 12 months was £1,146 million, again the highest since records began.
- Spend in the UK on television animation programmes over the last 12 months was £45 million, across 20 productions.
- The total spend on children's television programmes in the UK in the last 12 months was £48 million, across 41 productions.

2. Film production in the UK

The total spend in the UK on feature films that started principal photography in H1 2018 was £936 million, from 71 films (Table 1). Inward investment features accounted for 80% of this spend (£752 million), followed by domestic UK features (£178 million). The majority (98%) of the spend by domestic UK features was accounted for by 32 titles with a budget of £500,000 or over which had a combined UK spend of £174 million. The spend in the UK on co-productions was £6 million across 6 productions.

It should be noted that due to a 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.

Films which started principal photography during H1 included inward investment films *Maleficent 2, Wonder Woman 1984* and *The Personal History of David Copperfield;* domestic UK films which went into production included *Blinded by the Light* and *Spacedog and Turbocat,* whilst co-productions that started principal photography included *Special Couple* and *Gareth Jones.*

Table 1 Number and UK spend of features produced in the UK, H1 2018

	UK spend £ million	Number of features
Co-productions	6.5	6
Domestic UK features	177.8	47
Of which budget ≥ £500,000	*174.4*	*32*
Of which budget < £500,000	*3.4*	*15*
Inward investment features	751.5	18
Total	**935.8**	**71**

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.

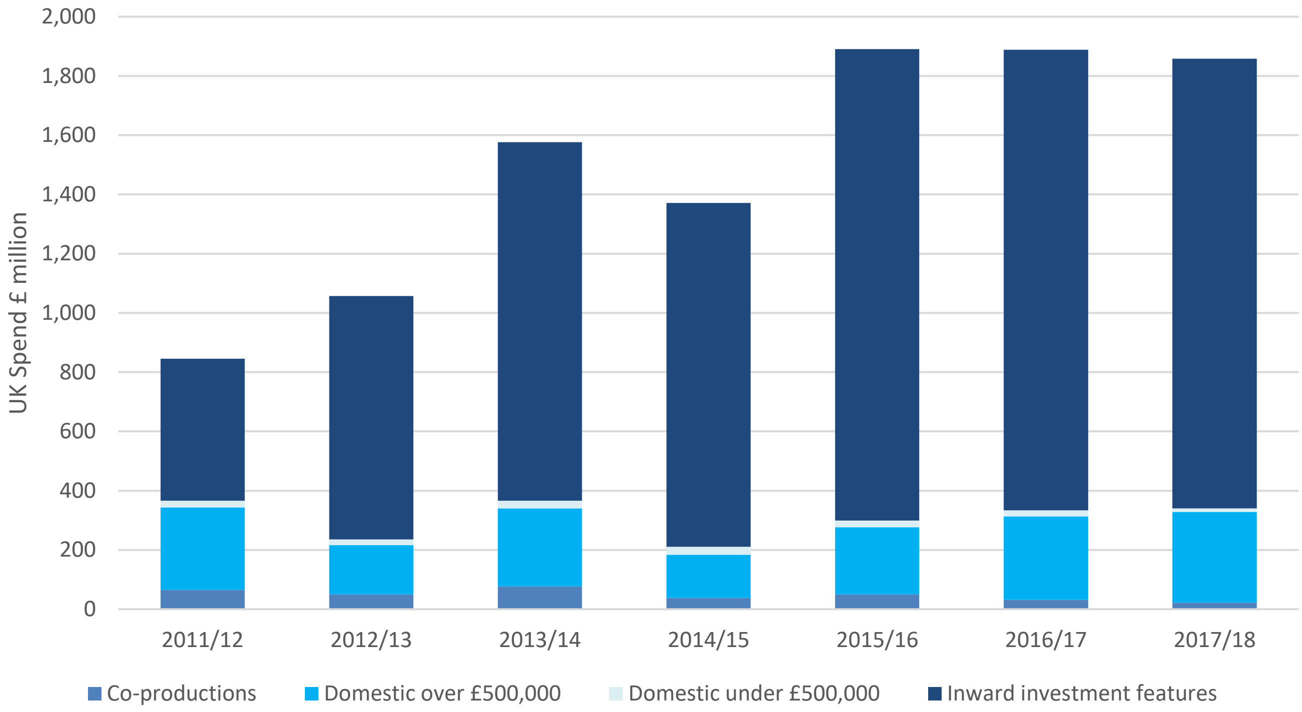
In the rolling 12 month period July 2017 to June 2018, total spend on film production in the UK was £1,858 million, this is currently below the total for the July 2016 to June 2017 rolling year, but the third highest in the reporting period, and is very likely to increase as more data becomes available (Table 2).
A breakdown of the total UK spend shows inward investment features contributed 82% of total spend (£1,517 million); domestic UK features contributed £318 million, with £306 million spent by domestic films with a budget of £500,000 and above. Co-productions contributed £22 million, the lowest for the reporting period continuing a downward trend seen over the past four years. These figures are likely to increase as more data becomes available.

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

	Rolling years: July - June						
	2011/12	**2012/13**	**2013/14**	**2014/15**	**2015/16**	**2016/17**	**2017/18**
Co-productions	65.1	50.3	76.6	38.6	49.7	31.6	*22.3*
Domestic UK features	300.9	184.8	289.4	172.0	249.9	302.1	*318.2*
Of which budget ≥ £500,000	*278.7*	*165.4*	*264.1*	*145.7*	*227.3*	*281.7*	*306.2*
Of which budget < £500,000	*22.2*	*19.4*	*25.3*	*26.3*	*22.6*	*20.4*	*12.0*
Inward investment features	479.3	821.6	1,210.6	1,160.4	1,591.0	1,554.6	*1,517.3*
Total without films with budgets <£500,000*	820.6	1,035.3	1,549.3	1,342.2	1,866.7	1,866.3	*1,845.6*
Total	**845.3**	**1,056.7**	**1,576.7**	**1,371.0**	**1,890.6**	**1,888.3**	***1,857.8***

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. See Appendix 1 for more detail

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. See Appendix 1 for more detail

There were 201 films that started principal photography in the UK in the rolling year from July 2017 to June 2018 (Table 3 and Figure 2). Although this is the lowest figure in this time series, 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.

For comparison the number of films reported in the equivalent Statistical Bulletin last year (Film and other screen sector production in the UK H1 2017) was 210 films, now revised upwards to 319. It is likely that this year's total of 201 will be revised upwards too, therefore these interim figures should not be assumed to be direct evidence of a decline in the production of domestic features in the UK. Please see Appendix 1 for a more detailed comparison.

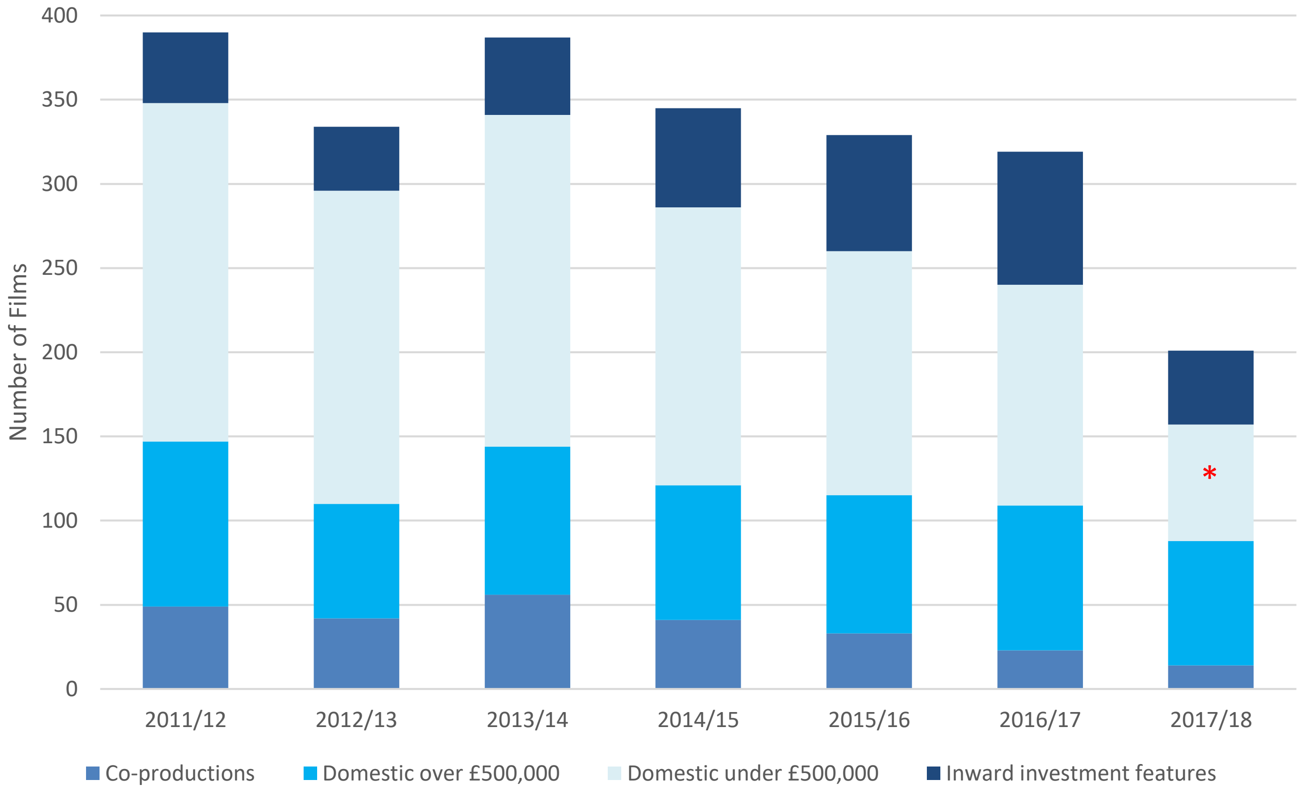
There is also an apparent decrease in the number of inward investment features from 79 in 2016/17 to 44 in 2017/18, however this number of productions is broadly comparable with the number reported in previous H1 statistical releases and is likely to increase as more information becomes available (See Appendix 1). The same is true of the apparent lower number domestic films 147. With 14 films co-production has continued its downward trend from recent rolling years.

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

	Rolling years: July – June						
	2011/12	**2012/13**	**2013/14**	**2014/15**	**2015/16**	**2016/17**	***2017/18***
Co-productions	49	42	56	41	33	23	*14*
Domestic UK features	299	254	285	245	227	217	*143*
Of which budget ≥ £500,000	*98*	*68*	*88*	*80*	*82*	*86*	*74*
Of which budget < £500,000	*201*	*186*	*197*	*165*	*145*	*131*	*69*
Inward investment features	42	38	46	59	69	79	*44*
Total without films with budgets <£500,000*	161	122	169	160	169	179	*130*
Total	**390**	**334**	**387**	**345**	**329**	**319**	***201***

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. See Appendix 1 for more detail

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. See Appendix 1 Figure A for more detail

3. High-end television production in the UK

Forty-seven high-end television (HETV) programmes started principal photography in the first half of 2017, with a total spend in the UK of £486 million (Table 4). This is the highest reported H1 UK spend figure reported since the introduction of the high-end television tax relief scheme in August 2013.

Inward investment HETV programmes accounted for 65% (£316 million) of the UK spend, with domestic HETV accounting for 35% of spend in the UK (£170 million), there were no co-production HETV projects that started filming in the first half of 2018. Titles that started principal photography included *His Dark Materials Series 1, Britannia Series 2, Catastrophe Series 4, MotherFatherSon* and *Summer of Rockets.*

Table 4 Number and UK spend of high-end television programmes produced in the UK, H1 2018

	UK spend £ million	Number of programmes
Co-Production	-	-
Domestic UK	170.7	23
Inward investment	315.6	25
Total	486.4	48

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).

The UK spend in the most recent year is £1,146 million (Table 5) is the highest since the analysis began and is a 17% increase on the previous high of £981 million in 2016/17. The largest contributor to this record UK spend is inward investment and co-production titles which accounted for £870 million (76%) of the total (in 2017/18 these were all inward investment programmes however in previous years co-productions have contributed to the total), with domestic productions accounting for the remaining 24%.
Due to the nature of TV production and screening rights in foreign countries on both traditional linear television and online streaming services we are increasingly seeing investment from international companies in many UK titles and changing business models, and this is in turn is complicating the classification of domestic and inward investment programmes.

Table 5 UK spend of high-end television programmes produced in the UK, 2013/14 – 2017/18

	Rolling year: July -June				
	2013/14	**2014/15**	**2015/16**	**2016/17**	***2017/18***
Domestic UK	311.6	332.7	394.8	348.5	*275.8*
Inward investment and co-production	330.0	336.1	438.7	632.5	*869.7*
Total	**641.5**	**668.9**	**833.5**	**981.0**	***1,145.5***

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.

There were 93 high-end television programmes that started filming in the year July 2017 – June 2018. Of these, 54 were inward investment HETV programmes accounting for 58% of the total, while the 39 domestic UK productions accounted for the remaining 42% (Table 6). As with the film data we would expect the number of productions to increase for this period as more information becomes available.

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

	Rolling year: July -June				
	2013/14	**2014/15**	**2015/16**	**2016/17**	***2017/18***
Domestic UK	55	57	73	68	*39*
Inward investment and co-production	27	32	34	44	*54*
Total	**82**	**89**	**107**	**112**	***93***

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.

4. Television animation programme production in the UK

There were seven animation programmes that started filming in the first half of 2018 with a UK spend of £18 million, for disclosure reasons we are not able to break them down further.
Titles that started production included *Hey Duggee Series 3, Norm of the Forest* and *Chip and Potato*.

Animation programme statistics are reported from April 2013 onwards, because animation production tracking started with the completion of the legislation procedures for the animation programmes tax relief in August 2013 (although the relief was backdated to 1 April 2013).

Between July 2017 and June 2018, 20 television animation programmes entered production, with a combined spend in the UK of £45 million (Tables 7 and 8). This is a decrease in the number of productions from the previous rolling year when 51 productions started. There has also been a decrease in the UK spend by 47%. Domestic programmes accounted for 67% (£31 million), with inward investment and co-production accounting for 33% of spend in the UK (£15 million).

As with other data in the statistical release this figure is likely to be revised upwards in future as there is a lag in obtaining complete data. For example, at this stage last year, the total for 2016/17 was 26 programmes and spend of £55.3m, both of which are now substantially higher now that we have more complete data.

Table 7 UK spend of animation programmes produced in the UK, 2013/14 – 2017/18

	Rolling year: July -June				
	2013/14	**2014/15**	**2015/16**	**2016/17**	***2017/18***
Domestic UK	67.1	67.9	48.5	44.8	*30.6*
Inward investment and co-production	20.9	24.5	31.3	41.2	*14.8*
Total	**88.1**	**92.4**	**79.7**	**86.0**	***45.4***

Source: BFI
Animation productions are allocated to the calendar quarter in which principal photography started.
Totals may not sum due to rounding.

Table 8 Number of animation programmes produced in the UK, 2013/14 – 2017/18

	Rolling year: July -June				
	2013/14	**2014/15**	**2015/16**	**2016/17**	***2017/18***
Domestic UK	40	42	44	36	*14*
Inward investment and co-production	11	21	16	15	*6*
Total	**51**	**63**	**60**	**51**	***20***

Source: BFI
Animation productions are allocated to the calendar quarter in which principal photography started.
Totals may not sum due to rounding.

5. Children's television production in the UK

There were ten children's television programmes that started filming in H1 2018, all of them were domestic and they had a combined UK spend of £13.9 million (Table 9). Titles that started production in 2017/18 included *Waffle the Wonder Dog Series 2* and *Lochside.*

Table 9 Number and UK spend of children's television programmes produced in the UK, H1 2018

	UK spend £ million	Number of programmes
Domestic UK	13.9	10
Inward investment and co-production	-	-
Total	13.9	10

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.

Between July 2017 and June 2018, 41 children's television programmes entered production, with a combined spend in the UK of £48 million (Table 10). Whilst the number of productions is lower than in the previous year when 64 productions started, it is highly likely that the number of productions will increase as more information becomes available. For disclosure reasons we are not able to break the numbers down further. Domestic programmes accounted for 80% (£39 million), with inward investment and co-production accounting for 20% of spend in the UK (£9 million).

As with other data in the statistical release this figure is likely to be revised upwards in future as there is a lag in obtaining complete data. By way of comparison, at this stage last year, 2016/2017 productions stood at £37.9m and 34 programmes.

Table 10 Number and UK spend of Children's television programmes produced in the UK, 2015/16 – 2017/18

	Rolling year: July -June					
	UK spend £ million			Number of programmes		
	2015/16	**2016/17**	***2017/18***	**2015/16**	**2016/17**	***2017/18***
Domestic UK	30.5	43.4	*38.5*	46	55	*c*
Inward investment and co-production	14.8	21.2	*9.4*	10	9	*c*
Total	**45.3**	**64.6**	***47.9***	**56**	**64**	***41***

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
Children's television are allocated to the calendar quarter in which principal photography started.
Totals may not sum due to rounding.

Appendix 1

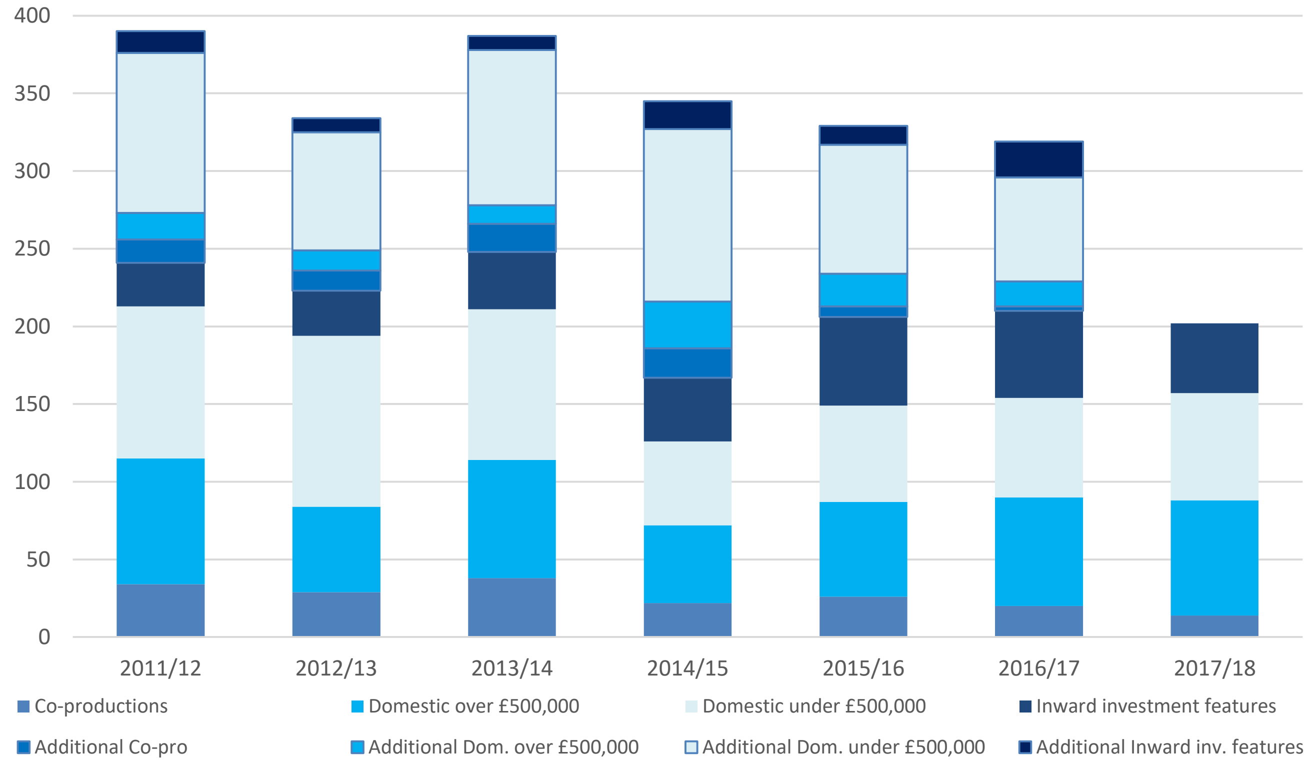
As explained in the main body of the report there is a lag in data relating to the collation of all production spend figures but especially for film production. Table A below shows the data for the rolling year as it was published in the H1 production statistics of that given, ie 2014/15 was published in H1 production statistics in July 2015. This allows a direct comparison of the stock of films starting principal photography in each rolling year as identified at the end of H1 in any given year. The total numbers are fairly consistent having a central tendency around 200 over the past three years

Table A Number of features produced in the UK, 2011/12 to 2017/18 as publish in H1 stats of that year.

	Rolling years: July – June						
	2011/12	**2012/13**	**2013/14**	**2014/15**	**2015/16**	**2016/17**	**2017/18**
Co-productions	34	29	38	22	26	20	14
Domestic UK features	179	165	172	104	123	134	143
Of which budget ≥ £500,000	81	55	75	50	61	70	74
Of which budget < £500,000	98	110	97	54	62	64	69
Inward investment features	28	29	37	41	57	56	44
Total without films with budgets <£500,000*	108	99	142	112	135	141	130
Total	**241**	**223**	**247**	**167**	**206**	**210**	**201**

Figure A displays the as reported numbers from Table A with the films of which we have later become aware displayed above the base data, in order to reflect the full stock of films as shown in Figure 2. This is done to aid understanding of the lag in obtaining complete data, and how the data in this report for 2017/2018 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 features produced in the UK, 2011/12 to 2017/18



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** will be reported in the release: British film and other screen sectors certification H1 2018 (Publication Date; 2nd August 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 **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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