Film and other screen sector production in the UK, January - September (Q1-Q3) 2016

BFI Research and Statistics Unit

03 November 2016

1. Key points

- Total UK spend for film in Q1-Q3 2016 was £1,094 million.
- Inward investment features contributed the highest UK spend with £950 million. UK spend on domestic features came to over £108 million.
- 135 films commenced principal photography, the lowest number of films in Q1-Q3 since the current data series started in 2010, this is attributable to a time lag in obtaining complete information on all low and micro-budget activity in the UK.
- Total UK spend in last 12 months (Q4 2014-Q3 2016) was £1,365 million, of which £1,151 million was inward investment features, £174 million was domestic features and £40 million was co-productions.
- In Q1-Q3 2016, a total of 63 high-end television programmes commenced principal photography with a UK spend of £561 million. Of these, 38 were domestic programmes, with a UK spend of £211 million and 25 were inward investment or co-productions with a UK spend of £350 million.
- 17 animation programmes started production in Q1-Q3 2016, with a total UK spend of £38 million, of which £18 million was for domestic programmes.

2. Film production in the UK in Q1-Q3 2016

The aggregate UK spend of feature films that commenced principal photography in Q1-Q3 2016 was £1,094 million, down from £1,140 million in Q1-Q3 2015 and the fourth highest after Q1-Q3 2015, Q1-Q3 2014 and Q1-Q3 2012. See Table 1 and Figure 1.

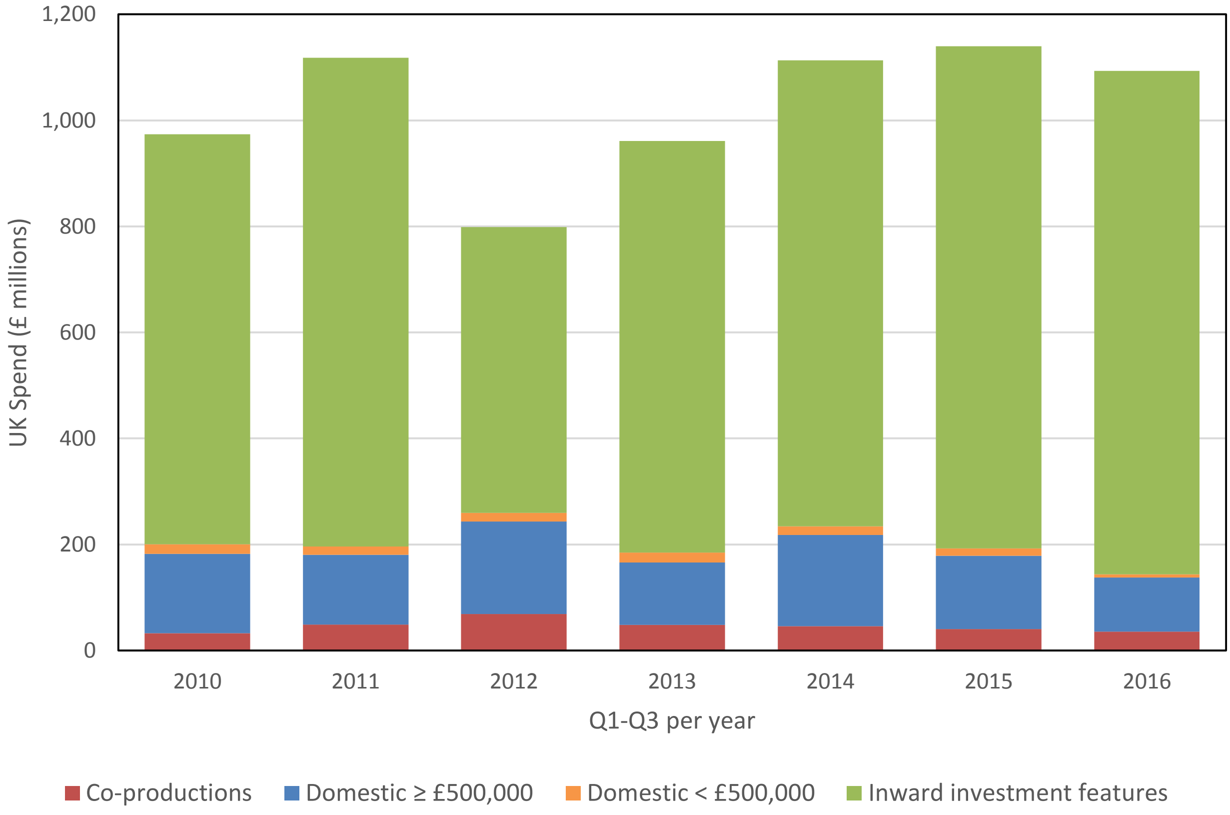
Inward investment features contributed the highest UK spend, with £950 million; this is up from Q1-Q3 2012 (£947 million) and the highest in the analysed period. Domestic features contributed £108 million. Of this over £102 million was from films with budgets of £500,000 or more; the lowest in the period. £6 million was from those with budgets of less than £500,000. Although this is the lowest Q1-Q3 UK spend for domestic films with budgets under £500,000 for the period shown it is mainly due to a time lag in obtaining complete information on all low and micro-budget activity in the UK in Q1-Q3 2016; as such this figure is likely to be revised upwards. Co-production UK spend was the second lowest in the time period at £36 million, after Q1-Q3 2010 (£33 million).

Table 1 UK spend of features produced in the UK, Q1-Q3 2010 to Q1-Q3 2016, £ million

	Q1-Q3						
	2010	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Co-productions	32.9	48.6	68.9	48.3	46.1	40.3	35.7
Domestic UK	167.6	147.5	190.6	136.3	188.4	152.2	107.9
Of which budget ≥ £500,000	*149.7*	*131.8*	*174.5*	*117.6*	*172.0*	*138.8*	*102.1*
Of which budget < £500,000	*17.9*	*15.7*	*16.1*	*18.7*	*16.4*	*13.5*	*5.9*
Inward investment	773.5	921.9	539.4	776.6	878.7	947.4	949.9
Total	**974.1**	**1,118.0**	**798.9**	**961.2**	**1,113.2**	**1,139.9**	**1,093.5**

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 Q1-Q3 2010 to Q1-Q3 2016, £ million



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

There were 135 films that commenced principal photography in the UK in Q1-Q3 2016. Titles commencing principal photography in Q1-Q3 2016 included *Victoria and Abdul*, *Life*, *The Bookshop* and *Final Score*.

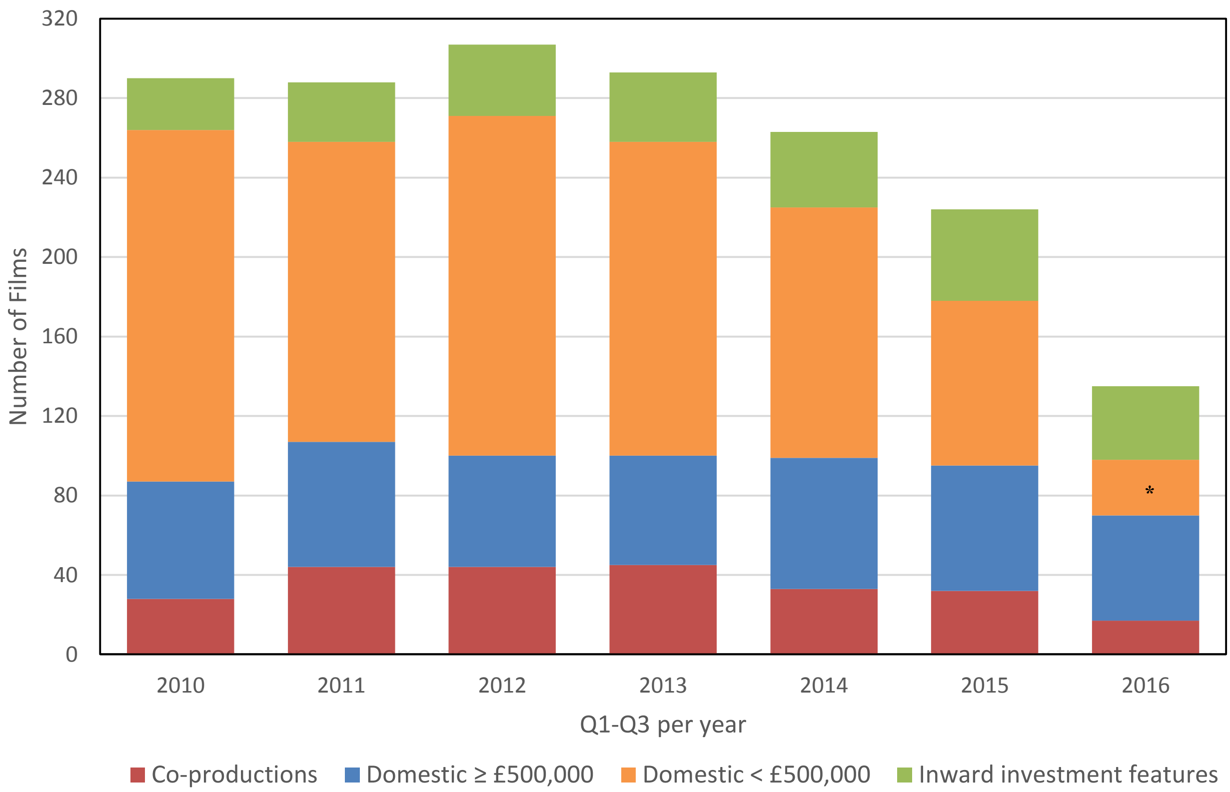
This is the lowest figure in the reporting period. It is mainly affected by the lag in obtaining complete data for domestic UK features with a budget of less than £500,000 mentioned above, and is likely to be revised upwards, but the numbers were also lower than recent years for both co-productions and inward investment films (Table 2 and Figure 2).

Table 2 Number of features produced in the UK, Q1-Q3 2008 to Q1-Q3 2016

	Q1-Q3						
	2010	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Co-productions	28	44	44	45	33	32	17
Domestic UK	236	214	227	213	192	146	81
Of which budget ≥ £500,000	*59*	*63*	*56*	*55*	*66*	*63*	*53*
Of which budget < £500,000	*177*	*151*	*171*	*158*	*126*	*83*	*28*
Inward investment	26	30	36	35	38	46	37
Total	**290**	**288**	**307**	**293**	**263**	**224**	**135**

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-Q3 2010–2016



Source: BFI
Films are allocated to the calendar quarter in which principal photography commenced.
* The low numbers for domestic productions with budgets under £500,000 is partially attributable to a time lag in obtaining complete information on all low and micro-budget activity in the UK.

This release also looks at UK spend and the number of films produced in the UK in a rolling year, highlighting the changes in spend in the last 12 months and the previous 12 month periods back to 2010. This is to give a broader impression of production trends in the UK. In this release the rolling year period covered is Q4 2010-Q3 2011 to Q4 2015-Q3 2016.

In the time period Q4 2010-Q3 2016, aggregate UK spend has consistently been above £1 billion for each 12 month period. Looking back over the last 12 months (Q4 2015-Q3 2016), the aggregate UK spend of feature films that commenced principal photography was £1,365 million, down from £1,540 million in the previous 12 months, Q4 2014-Q3 2015 (Table 3 and Figure 3). This is the second highest of the time period.

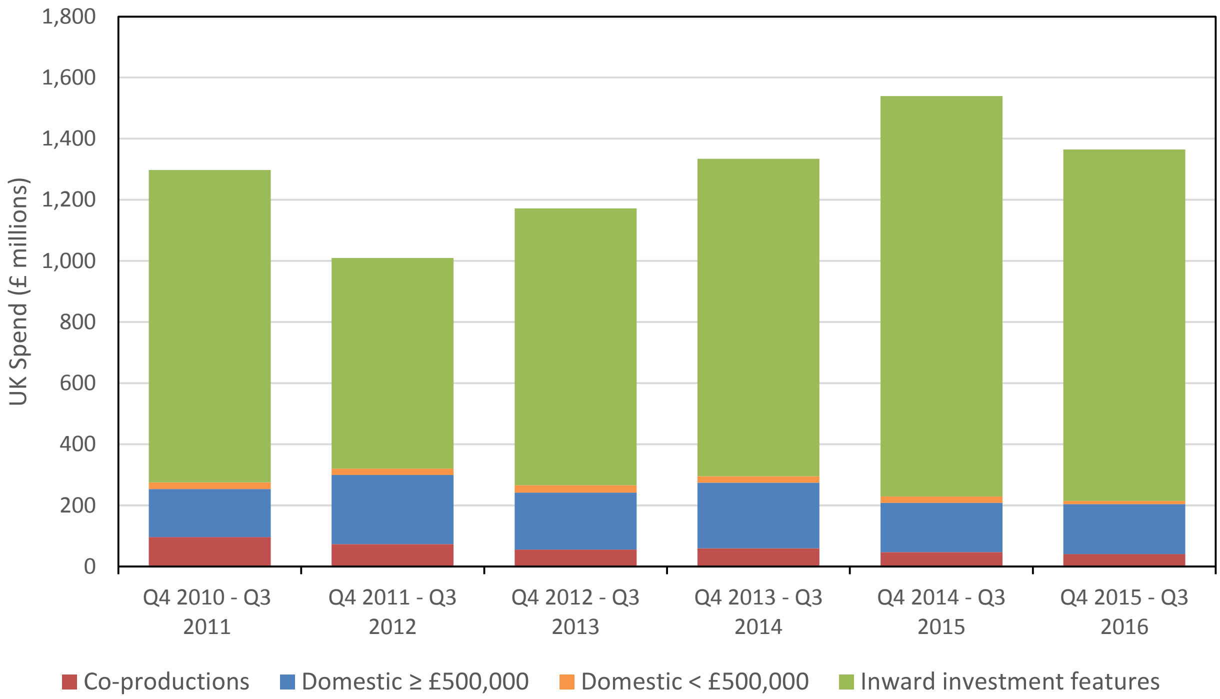
Inward investment features contributed the highest UK spend, with £1,151 million; this is the second highest amount in the reporting period after Q4 2014-Q3 2015. Domestic features contributed £174 million, the lowest of the period. Of this £164 million was from films with budgets of £500,000 or more and over £10 million from those with budgets of less than £500,000. This is the lowest UK spend for domestic films with budgets under £500,000 for the period shown, however as there is a lag in the collection of data especially on these smaller budget productions it is expected to be revised upwards in future statistical releases. Co-production UK spend was the lowest in the time period at £40 million. UK spend for this production category was consistently the lowest UK spend of the three main production categories in the time period.

Table 3 UK spend of features produced in the UK, rolling year, Q4 2010 to Q3 2016, £ million

	Q4 2010 - Q3 2011	Q4 2011 - Q3 2012	Q4 2012 - Q3 2013	Q4 2013 - Q3 2014	Q4 2014 - Q3 2015	Q4 2015 - Q3 2016
Co-productions	96.2	72.6	55.0	59.0	46.9	40.3
Domestic UK	179.5	248.0	211.4	235.7	181.8	174.1
Of which budget ≥ £500,000	*156.8*	*227.1*	*187.2*	*215.7*	*160.8*	*163.7*
Of which budget < £500,000	*22.7*	*20.9*	*24.1*	*20.0*	*21.0*	*10.4*
Inward investment	1,022.3	688.5	905.8	1,039.9	1,311.1	1,150.9
Total	**1,298.0**	**1,009.1**	**1,172.1**	**1,334.5**	**1,539.8**	**1,365.3**

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 3 UK spend of features produced in the UK, rolling year, Q4 2010 to Q3 2016, £ million



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

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

In this release high-end television programmes (HETV) statistics are reported for Q1-Q3 2014 to Q1-Q3 2016 only because HETV production tracking commenced in line with the completion of the legislation procedures for HETV tax relief in August 2013 (despite the relief being backdated to 01 April 2013). Therefore, data for first nine months of 2013 are not available.

The aggregate UK spend for high-end television programmes that commenced principal photography in Q1-Q3 of 2016 was over £561 million. Domestic HETV contributed £211 million while inward investment and co-productions combined contributed the highest UK spend at £350 million (Table 4).

Table 4 UK spend of high-end television programmes produced in the UK Q1-Q3 2014 to Q1-Q3 2016, £ million

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016
Domestic UK	297.8	370.7	210.6
Inward Investment and Co-productions	311.6	384.0	350.4
Total	**609.4**	**754.7**	**561.0**

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 commenced.

A total of 63 HETV programmes commenced principal photography in Q1-Q3 2016. Domestic HETV contributed the highest number of programmes at 38, whilst inward investment and co-productions combined contributed 25 programmes (Table 5). These figures are lower than Q1-Q3 2015, this can partially explained by the lag in identifying smaller budget productions and these numbers will likely increase as more information becomes available.

Table 5 Number of high-end television programmes produced in the UK Q1-Q3 2015 to Q1-Q3 2016

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016
Domestic UK	50	53	38
Inward Investment and Co-productions	30	21	25
Total	**80**	**76**	**63**

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

Titles commencing principal photography included *Poldark Series 3*, *Decline and Fall, Game of Thrones Season 7* and *Fearless.*

4. Television animation programmes – British productions and co-productions
As with HETV, animation programmes statistics are reported for Q1-Q3 2014 and Q1-Q3 2016 only because animation production tracking commenced in line with the completion of the legislation procedures for animation programmes tax relief in August 2013 (despite the relief being backdated to 01 April 2013). Therefore, data for first nine months of 2013 are not available.

The aggregate UK spend for animation programmes that commenced principal photography in Q1-Q3 of 2016 was over £38 million. Domestic animation programmes contributed over £17 million whilst inward investment and co-productions combined contributed over £20 million (Table 6). As with the other data there is a lag in information becoming especially on domestic animations.

Table 6 UK spend of animation programmes produced in the UK Q1-Q3 2015-2016, £ million

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016
Domestic UK	42.5	20.4	17.7
Inward Investment & Co-production	19.8	20.3	20.5
Total	**62.3**	**40.7**	**38.2**

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.

A total of 17 animation programmes commenced principal photography in Q1-Q3 2016 (Table 7).

Table 7 Number of animation programmes produced in the UK, Q1-Q3 2016*

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016
Domestic UK	29	14	9
Inward Investment & Co-production	12	10	8
Total	**41**	**24**	**17**

Animation programmes are allocated to the period according to the date principal photography commenced.
* Figures are rounded to the nearest five due to disclosure control rules

Titles commencing principal photography in Q1-Q3 2016 included *Shane the Chef* and *Newzoids Series 2.*

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.

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** and **Children's Television** will be reported in the release: British Film and other screen sector certification Q1-Q3 2016 (Publication Date; 3rd November 2016).

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.

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 (2010). Pre-release access has been granted to the following:

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Ben Roberts, Director, Film Fund, BFI
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