

Film and high-end television production in the UK, January-March (Q1) 2020

BFI Research and Statistics Unit

7th May 2020

1. Key Points

- The combined total spend on film and high-end television (HETV) production in the UK for Q1 2020¹ was £651 million from 51 productions. This is the second highest Q1 combined film and HETV spend ever recorded (2017 is the highest to-date).
- The total film and HETV spend for the 12 month rolling period April 2019 to March 2020 was £3.6 billion, £200 million higher than the previous 12 month period, and the highest on record.
- 161 inward investment and co-productions accounted for £3.1 billion of the total £3.6 billion film and HETV spend (86%) for the latest 12 month rolling period. This is the highest ever total inward investment and co-production spend reported for April-March rolling periods.
- 29 films started shooting during Q1 2020¹ three more than for Q1 2019. The total UK production spend for these films was £385 million, 40% higher than the same period last year. Inward investment and co-production spend accounted for the bulk (96%) of the spend (£368 million), over 70% higher than Q1 2019. UK domestic production spend of £17 million registered a 72% drop on Q1 2019.
- 22 HETV productions began principal photography in Q1 2020 with a total UK spend of £266 million, 7% higher than for the Q1 2019.
- When the film and HETV productions which were planned to start production in Q1, but were postponed due to the COVID-19 lockdown, are taken into account, the total volume of productions started in Q1 2020 would have risen from 51 to 68 titles, with a total spend of £1.08 billion. This would have been, to a significant degree, the largest Q1 combined film and HETV production spend in the UK ever reported.

2. Film production in the UK

The total number of films starting principal photography during the first quarter of 2020 was 29, three more than the number of films reported for Q1 2019. The total UK spend for these films was £385.3 million, 40% more than total UK film production spend for Q1 2019. Inward investment and co-production film features accounted for 96% of the total spend and was 72% higher than for Q1 2019. Domestic spend was £17.3 million, a 72% decline on the Q1 2019 reported spend.

Inward investment films that started filming in Q1 include the sixth film in the Jurassic Park franchise, *Jurassic World: Dominion* directed by Colin Trevorrow; *The Batman* directed by Matt Reeves and starring Robert Pattinson; *Cinderella* directed by Kay Cannon; and *Laila Manju*, an Indian inward investment comedy directed by Prem Raj Soni.

¹ The statistics in this official release cover productions which started principal photography from the 1st of January to the 16th of March, and not the full three months of Q1. These include productions which had started and completed principal photography during the three month period, as well as productions which had started photography but had to be suspended due to the impact of the coronavirus pandemic.

Domestic UK films that started filming included the Robert Mitchell directed comedy-drama, *The Duke* (starring Helen Mirren and Jim Broadbent); *Pirates* directed by Reggie Yates; *Quant* by Sadie Frost; and *the Puffin Rock Movie* directed by Jeremy Purcell.

Table 1 Number and UK spend of features produced in the UK, Q1 2020

	UK spend £ million	Number of features
Domestic UK features	17.3	16
Inward investment and co-productions	368.1	13
Total	385.3	29

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

Spend across the full 12 month rolling period (April 2019 to March 2020) was £1,842 million (Table 2). This is 7% below the total film spend reported for the equivalent 12 month period the previous year (£1,980 million).

For the 12 month rolling period, inward investment production spend was £1,676 million. This is the second highest inward investment spend on record; April 2016 to March 2017 (£1,860 million). Domestic UK features accounted for £132 million of the total 12 month rolling spend. Of these productions, 94% of were films with budgets larger than £500k. The domestic total spend was a drop of 54% versus the previous 12 month period. Note that a production reporting lag factor will mean that the domestic spend figures is expected to increase as more production information is tracked.

Table 2 UK spend (£) of features produced in the UK, 2015/2016 to 2019/2020

	Rolling Years: April to March				
	2015/16	2016/17	2017/18	2018/19	2019/20
Co-productions	43.0	37.2	35.2	23.9	34.5
Domestic UK features	283.5	318.6	312.1	287.6	132.3
<i>Of which budget</i>					
<i>≥ £500,000</i>	258.3	295.8	287.8	270.6	124.3
<i>Of which budget</i>					
<i>< £500,000</i>	25.2	22.8	24.3	17.0	8.1
Inward investment features	1,283.0	1,860.4	1,511.6	1,668.6	1,676.1
Total without films with budgets <£500,000*	1,582.5	2,192.0	1,833.0	1,961.9	1,825.0
Total	1,609.5	2,216.2	1,858.9	1,980.1	1,842.9

Source BFI

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

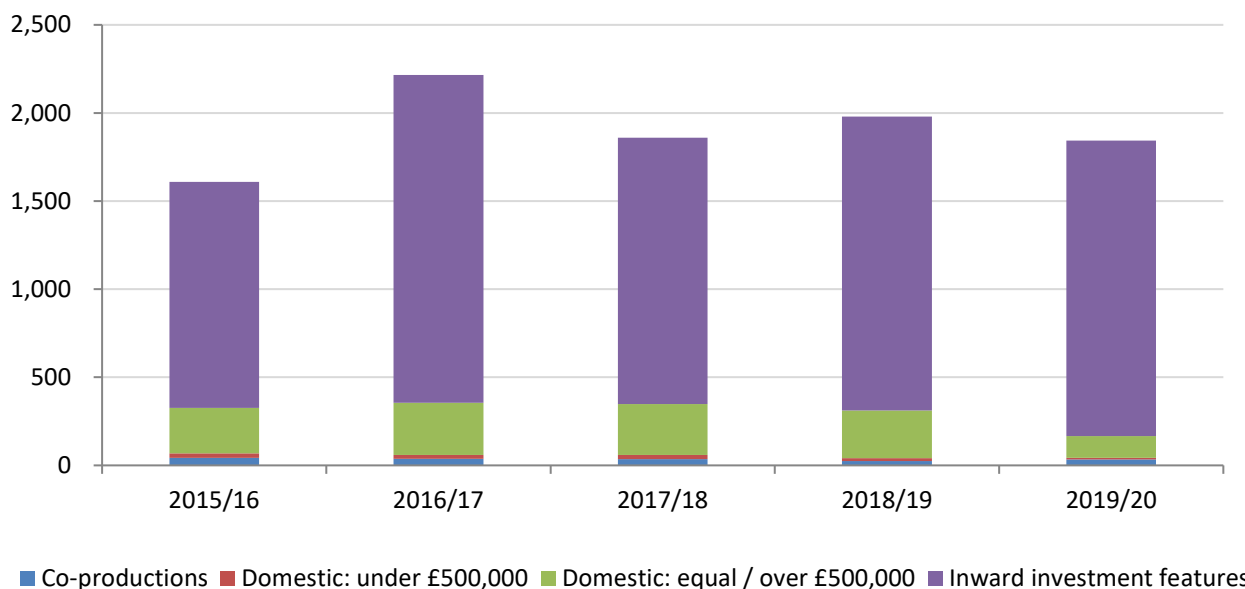
Films are allocated to the calendar quarter in which principal photography started.

*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 (2019/20) are very likely to be amended upwards in future as more data becomes available.

Figure 1 UK spend (£ millions) of features produced in the UK, 2015/2016 to 2019/2020



Source: BFI

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

Figures for the most recent Rolling Year (2019/20) are very likely to be amended upwards in future as more data becomes available.

A total of 189 productions started shooting across the 2019/2020 rolling 12 month period (Table 3). Of these 53% were domestic features, 34% were inward investment productions and 13% were co-productions.

Table 3 Number of film features produced in the UK, 2015/2016 to 2019/2020

	Rolling Years: April to March				
	2015/16	2016/17	2017/18	2018/19	2019/20
Co-productions	34	26	27	21	24
Domestic UK features	260	240	244	177	101
<i>Of which budget</i>					
<i>≥ £500,000</i>	98	92	89	91	49
<i><£500,000</i>	162	148	155	86	52
Inward investment features	58	78	61	70	64
Total without films with budgets <£500,000*	171	186	167	177	133
Total	352	344	332	268	189

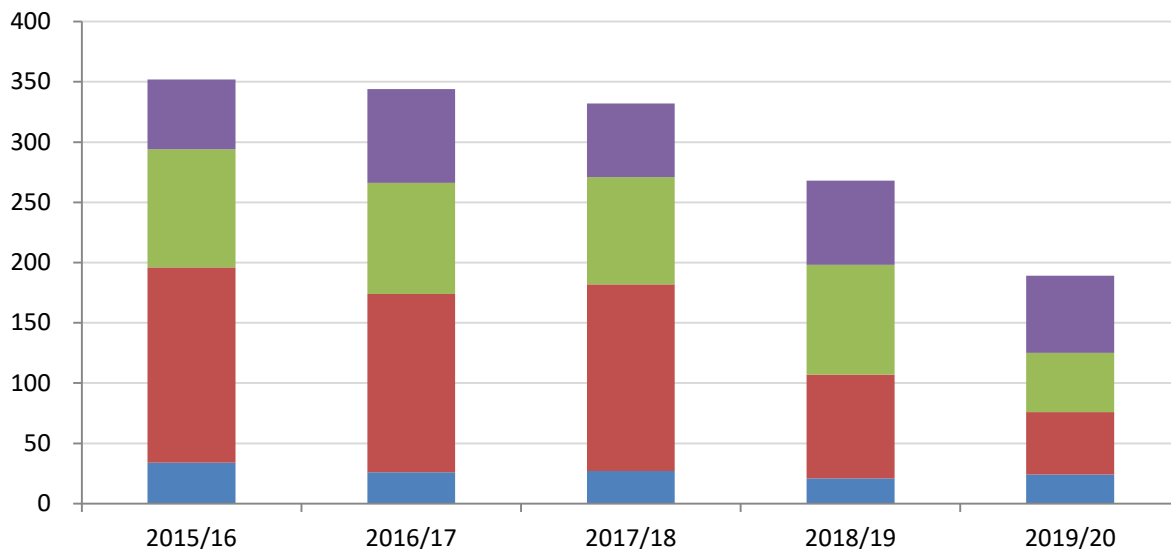
Films are allocated to the calendar quarter in which principal photography started.

*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 (2019/20) are very likely to be amended upwards in future as more data becomes available. Inward investment features include films with visual effects (VFX) post production in the UK

Figure 2 Number of features produced in the UK, 2014/2015 to 2019/2020



■ Co-productions ■ Domestic: under £500,000 ■ Domestic: equal / over £500,000 ■ Inward investment features

Source: BFI

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

*Figures for the most recent Rolling Year (2019/20) are very likely to be amended upwards in future as more data becomes available.

3. High-end television production

Total UK spend on high-end television (HETV) programming commencing principal photography during Q1 2020 was £265.7 million (Table 4) from 22 productions. This was 7% larger than the £248 million figure reported in the Q1 2019 statistical release. Domestic HETV spend was £66 million, 17% higher than the £57 million spend reported for Q1 2019. The 11 inward investment titles contributed £199.3 million to the total HETV spend. This is the highest Q1 quarter inward investment /co-productions UK spend on record.

Table 4 Number and UK spend of high-end TV programmes, Q1 2020

	UK spend £ million	Number of programmes
Domestic UK	66.4	11
Inward investment	199.3	11
Total	265.7	22

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.

HETV projects which started filming in Q1 2020 included the second series in both the DC Comics Batman spin-off crime drama *Pennyworth* and Netflix's *The Witcher*, the third series of Sky's *Britannia*, and the sixth series of BBC's *Line of Duty*.

Table 5 shows the rolling 12 month HETV spend for the past five years. Spend across the latest 12 months was £1.78 billion, the highest recorded high-end television spend on record, Inward investment and co-productions account for 79% of the total HETV spend. At just over

£1.4 billion, the total spend on HETV inward-investment and co-production was over £1 billion higher than that recorded four years previously (2015/2016) and shows a consistent pattern of increase in UK spend over the period. Total domestic HETV spend was £367 million, a decrease of £68 million against the 12 months 2018/2019, but consistent with the spend in the previous years

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

£ millions	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020
Domestic UK	378.2	384.0	376.9	434.41	366.5
Inward investment and co-productions	386.1	686.7	857.8	1,005.5	1,411.4
Total	764.3	1,070.7	1,234.7	1,439.9	1,777.9

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.

The number of HETV inward investment and co-productions was 74 for the latest 12 months period, maintaining the consistent increase in the volume of inward investment and co-productions reported over the past four rolling years. There were 55 domestic productions. This number can be expected to increase as more production information is tracked. The volume of domestic HETV productions reported in last year's Q1 release was 49, and has since been revised upwards to 68 with additional tracking information.

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

Number of Productions	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020
Domestic UK	66	72	58	68	55
Inward investment and co-production	26	51	60	76	74
Total	92	123	118	144	128

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 A:

Table 7 shows the total volume and the UK spend of the film and HETV production which either commenced principal photography, or which had been planned to start during the second half of March, but were postponed due to the impact of COVID-19.

In total, 17 productions were due to start principal photography in the second half of March. The estimated spend of these postponed productions was £426 million. The aggregate spend of actual and planned productions for Q1 2020 would therefore have been £1,077 million, a record in terms of both volume and UK spend. It would have been £554 million more than for Q1 2019, and £281 million, or 35% more than the previous highest spend recorded in Q1 2017 (Table 8).

Table 7 Q1 Actual and planned film and HETV production

Volume				UK £ spend (millions)			
	Q1 Actual	Q1 Planned	Total		Q1 Actual	Q1 Planned	Total
Film	29	8	37	Film	385.2	366.3	751.5
HETV	22	9	31	HETV	265.7	60.0	325.7
Total Film and HETV	51	17	68	Total Film and HETV	650.9	426.3	1,077.3

Source: BFI

Planned production spends are forecast estimates on planned date of commencement of principal photography

Totals may not sum due to rounding.

Table 8 Film and HETV UK production spend (£millions), Q1 2016-2020

	2016	2017	2018	2019	2020 Actual	2020 Actual + Planned
Film	200	651.6	385.8	274.8	385.2	751.5
HETV	97.4	144.8	152.1	247.8	265.7	325.7
Total Film and HETV	297.4	796.4	537.9	522.6	650.9	1,077.3

Source: BFI

Planned production spends are forecast estimates on planned date of commencement of principal photography

Totals may not sum due to rounding.

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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