Film and other screen sector production in the UK, January - September (Q1-Q3) 2017

BFI Research and Statistics Unit

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1. Key points

- Total UK spend for film in Q1-Q3 2016 was £1,778 million, the highest since our records began.
- Inward investment features contributed the highest UK spend with £1,571 million. UK spend on domestic features came to over £175 million.
- 160 films started principal photography in Q1-Q3. This is the lowest number since analysis began, however this is likely to be revised up as in previous years such as Q3 2016 was initially reported as 135 and has subsequently been revised in this release to 226 as more information has become available.
- Total UK spend in last 12 months (Q4 2016-Q3 2017) was £2,088 million, of which £1,786 million was inward investment features, £261 million was domestic features and £40 million was co-productions.
- In Q1-Q3 2017, a total of 62 high-end television programmes started principal photography with a UK spend of £516 million. Of these, 33 were domestic programmes, with a UK spend of £229 million and 29 were inward investment or co-productions with a UK spend of £288 million.
- 14 animation programmes started production in Q1-Q3 2017, with a total UK spend of £45 million, of which £33 million was for domestic programmes.

2. Film production in the UK in Q1-Q3 2017

The aggregate UK spend of feature films that started principal photography in Q1-Q3 2017 was £1,778 million, up from £1,315 million in Q1-Q3 2016 and the highest since our analysis began. See Table 1 and Figure 1.

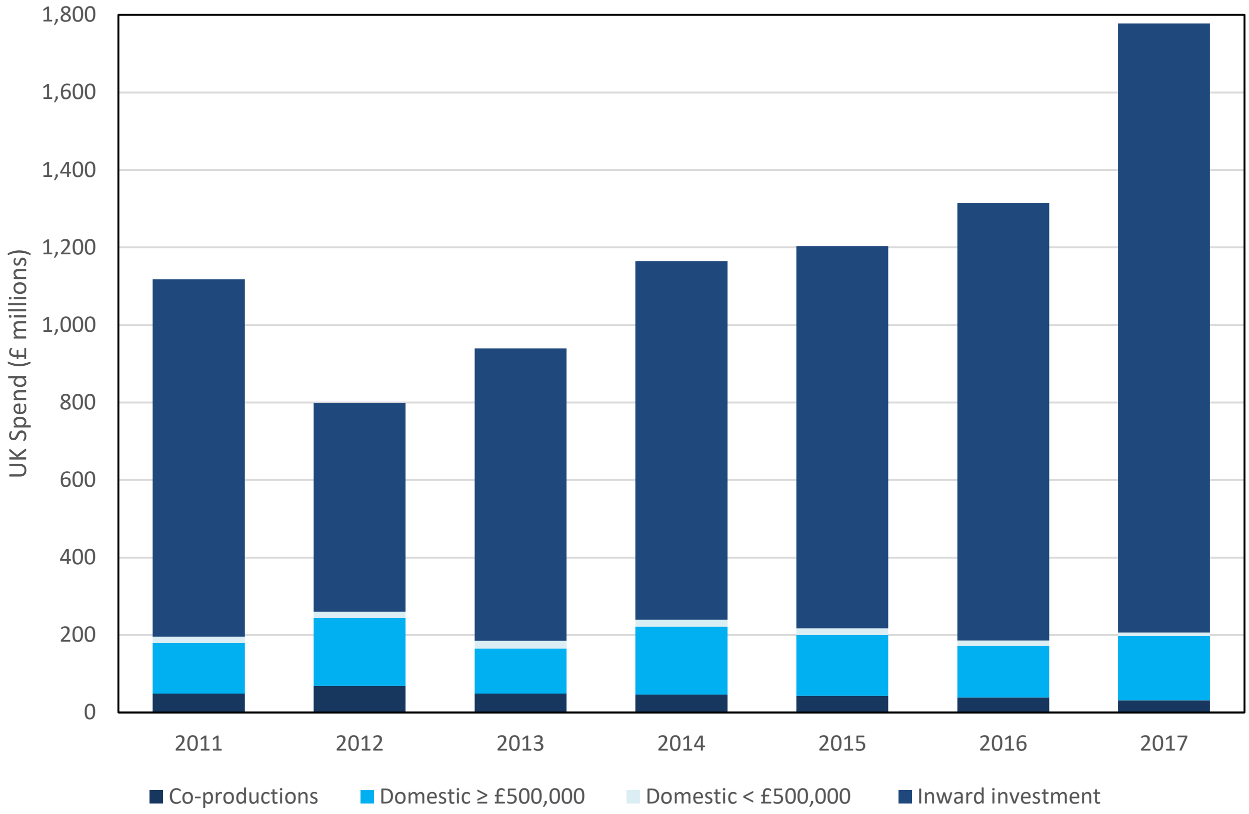
Inward investment features contributed the highest UK spend, with £1,571 million; this is up from Q1-Q3 2016 (£1,129 million) and the highest in the analysed period. Domestic features contributed £175 million. Of this over £166 million was from films with budgets of £500,000 or more; the third highest in the period analysed. £9 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 lowest in the time period at £31 million, down from £38.6 million in Q1-Q3 2016.

Table 1 UK spend of features produced in the UK, Q1-Q3 2011 to Q1-Q3 2017, £ million

	Q1-Q3						
	2011	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**
Co-productions	48.6	68.9	48.4	46.5	42.7	38.6	31.3
Domestic UK	147.5	191.0	136.5	193.2	174.3	147.5	175.5
Of which budget ≥ £500,000	*130.8*	*175.0*	*116.9*	*174.4*	*157.2*	*133.1*	*166.1*
Of which budget < £500,000	*16.7*	*16.0*	*19.5*	*18.8*	*17.2*	*14.4*	*9.4*
Inward investment	921.4	539.4	754.3	925.2	986.7	1,129.3	1,571.2
Total	**1,117.5**	**799.2**	**939.3**	**1,165.0**	**1,203.8**	**1,315.4**	**1,778.0**

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 Q1-Q3 2011 to Q1-Q3 2017, £ million



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

There were 160 films that started principal photography in the UK in Q1-Q3 2017. This is the lowest figure in the reporting period, however 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. In last year's Q3 2016 release (Film and other screen sector production in the UK, January – September (Q1-Q3) 2016) the number of films reported for 2016 was 135 which has subsequently been revised in this release to 226 as more information has become available. It is likely that this year's total of 160 will be revised upwards therefore it is not necessarily direct evidence of a decline in the production of domestic features in the UK.

There were 92 Domestic projects that started principal photography in 2017 and these account for the majority of productions. Domestic titles starting principal photography in Q3 2017 included *The Souvenir Part 1, Johnny English 3* and *Tell it to the Bees.*

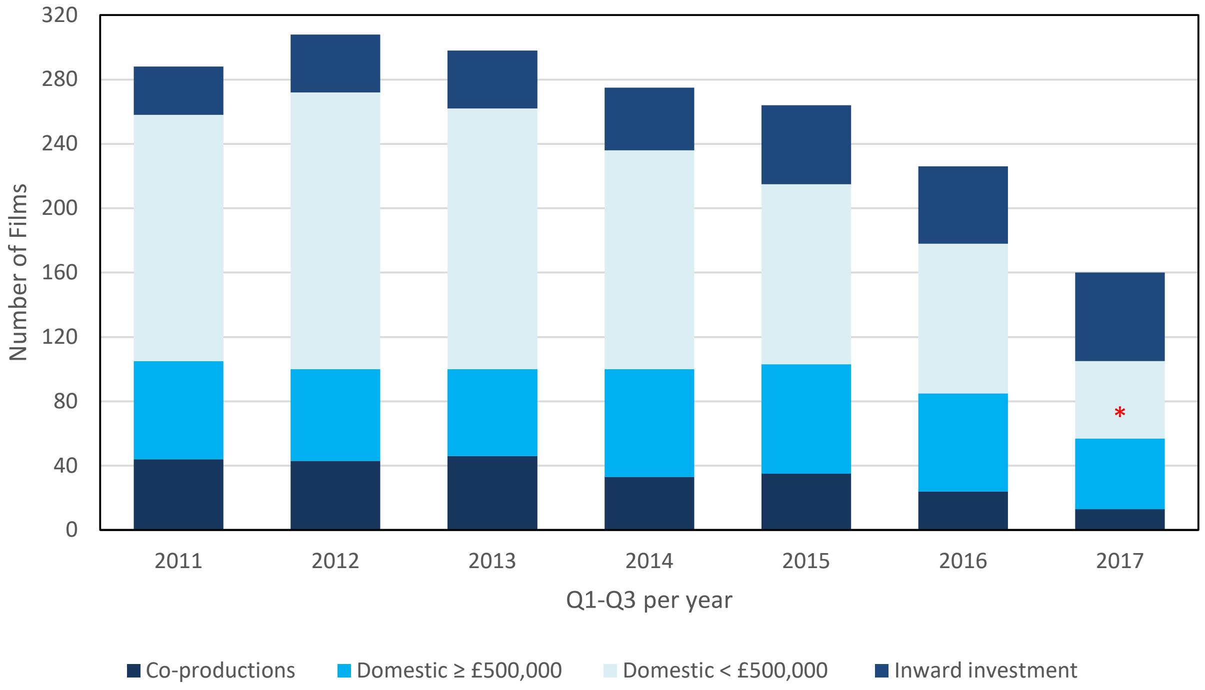
The number of Inward Investment projects are the highest in the period (55). Inward Investment films that started principal photography in Q£ of 2017 include: *Aladdin, Mamma Mia! Here We Go Again* and *Fantastic Beasts and Where to Find Them* 2. The number of co-productions is the lowest continuing a downward trend since 2013 (Table 2 and Figure 2) co-production films from Q3 207 include *The Little Stranger* and *Vita and Virginia*.

Table 2 Number of features produced in the UK, Q1-Q3 2011 to Q1-Q3 2017

	Q1-Q3						
	2011	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**
Co-productions	44	43	46	33	35	24	13
Domestic UK	214	229	216	203	180	154	92
Of which budget ≥ £500,000	*61*	*57*	*54*	*67*	*68*	*61*	*44*
Of which budget < £500,000	*153*	*172*	*162*	*136*	*112*	*93*	*48*
Inward investment	30	36	36	39	49	48	55
Total	288	308	298	275	264	226	160

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 2011–2017



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 2011. This is to give a broader impression of production trends in the UK. In this release the rolling year period covered is Q4 2011-Q3 2012 to Q4 2016-Q3 2017.

In the time period Q4 2011-Q3 2017, aggregate UK spend has consistently increased year on year from just over £1 billion to over £2 billion for the most recent 12 month period (Q4 2016-Q3 2017).

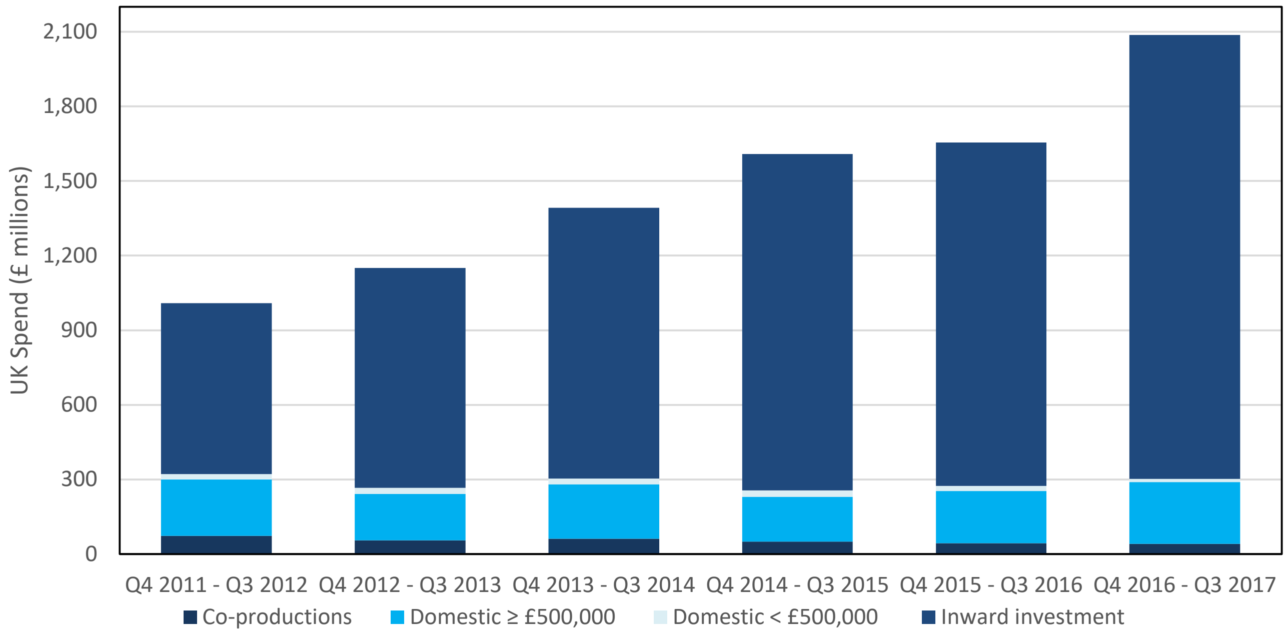
Inward investment features contributed the highest UK spend, with £1,786 million; this is the by some margin the highest amount in the reporting period. Domestic features contributed £261 million, again the highest of the period. Of this £248 million was from films with budgets of £500,000 or more and under £13 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 2011 to Q3 2017, £ million

	Q4 2011 - Q3 2012	Q4 2012 - Q3 2013	Q4 2013 - Q3 2014	Q4 2014 - Q3 2015	Q4 2015 - Q3 2016	Q4 2016 - Q3 2017
Co-productions	72.5	55.1	61.0	49.5	43.3	40.4
Domestic UK	248.4	211.2	243.0	205.9	230.4	261.2
Of which budget ≥ £500,000	*227.6*	*186.0*	*220.0*	*180.6*	*209.5*	*248.5*
Of which budget < £500,000	*20.7*	*25.2*	*23.0*	*25.3*	*20.9*	*12.7*
Inward investment	688.5	883.5	1,088.3	1,353.7	1,380.9	1,786.4
Total	**1,009.4**	**1,149.8**	**1,392.2**	**1,609.1**	**1,654.6**	**2,088.0**

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 3 UK spend of features produced in the UK, rolling year, Q4 2011 to Q3 2017, £ 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 2017 only because HETV production tracking started 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 2013 omitted as they are not directly comparable.

The aggregate UK spend for high-end television programmes that started principal photography in Q1-Q3 of 2017 was over £516 million down from £675 million in 2016. However again it should be Domestic HETV contributed £229 million while inward investment and co-productions combined contributed the highest UK spend at £288 million, the vast majority of which was related to Inward Investment programmes (Table 4).

Table 4 UK spend of high-end television programmes produced in the UK Q1-Q3 2014 to Q1-Q3 2017, £ million

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016	Q1-Q3 2017
Domestic UK	297.8	360.2	290.5	228.7
Inward Investment and Co-productions	311.6	387.4	384.2	287.6
Total	**609.4**	**747.6**	**674.7**	**516.3**

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 62 HETV programmes started principal photography in Q1-Q3 2017. Domestic HETV contributed the highest number of programmes at 33, titles tht started principal photography in Q3 include *A Discovery of Witches* and *Poldark Series 4.* Inward investment and co-productions combined contributed 29 programmes (Table 5) example titles that started in Q3 2017 include *Good Omens* and *Vanity Fair*.

This is the lowest figure in the reporting period, however 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. In last year's Q3 2016 release (Film and other screen sector production in the UK, January – September (Q1-Q3) 2016) the number of HETV reported for 2016 was 63 which has subsequently been revised in this release to 81 as more information has become available. It is likely that this year's total of 62 will be revised upwards therefore it is not necessarily direct evidence of a decline in the production of HETV programmes in the UK.

Table 5 Number of high-end television programmes produced in the UK Q1-Q3 2014 to Q1-Q3 2017

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016	Q1-Q3 2017
Domestic UK	50	54	52	33
Inward Investment and Co-productions	30	24	29	29
Total	**80**	**78**	**81**	**62**

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

4. Television animation programmes – British productions and co-productions

As with HETV, animation programmes statistics are reported for Q1-Q3 2014 and Q1-Q3 2017 only because animation production tracking started 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 2013 omitted as they are not directly comparable.

The aggregate UK spend for animation programmes that started principal photography in Q1-Q3 of 2017 was just under £46 million. Domestic animation programmes contributed nearly £33 million whilst inward investment and co-productions combined contributed over £13 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 2014-2017, £ million

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016	Q1-Q3 2017
Domestic UK	49.3	30.6	47.8	32.6
Inward Investment and Co-productions	15.2	20.3	21.5	13.1
Total	**64.5**	**50.9**	**69.3**	**45.7**

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 14 animation programmes started principal photography in Q1-Q3 2016 (Table 7).

Titles starting principal photography in Q3 2017 included *Horatio (Genius for Hire)* and *Wisspers Series 2*.

Table 7 Number of animation programmes produced in the UK, Q1-Q3 2014-2017

	Q1-Q3 2014	Q1-Q3 2015	Q1-Q3 2016	Q1-Q3 2017
Domestic UK	33	26	29	9
Inward Investment and Co-productions	11	10	10	5
Total	**44**	**36**	**39**	**14**

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

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 2017 (Publication Date; 2nd November 2017).

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:

Amanda Nevill, Chief Executive, BFI
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Richard Shaw, Director of Communications, Marketing and Audiences, BFI
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