Film and high-end television production in the UK, January-June (H1) 2020

Note: from the end of March a majority of film and high-end TV productions were suspended or had their start date postponed owing to the COVID-19 pandemic.

BFI Research and Statistics Unit
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1. Key points

- **Almost all UK film and HETV productions were suspended or postponed by the end of Q1 in response to the coronavirus (COVID-19) pandemic, therefore H1 2020 is atypical in terms of the reported value and volume of productions. To a significant degree the 2020 H1 statistics reflect the three months of production activity as reported in the Q1 statistics release.**
- The combined total spend on film and high-end television (HETV) productions in the UK for H1 2020[1] was £699 million, £918 million lower than for H1 2019 (-57%). The total number of productions for H1 2020 was 63 compared to 116 for the same period in 2019 (-46%).
- The total film and HETV spend in the UK for the 12 month rolling period July 2019 – June 2020 was £2.6 billion, £961 million lower than the previous 12 month period. The total volume of productions starting principal photography was 252 for 2019/2020 compared to 417 productions for the previous 12 month period. The variance in reported volume of productions is due, in part, to a time lag in obtaining production information.
- 41 films started shooting during H1 2020, 24 less than for H1 2019. The total UK production spend for these films was £403 million, 54% lower than for the same period in 2019. Inward investment and co-production spend accounted for 94% of the total spend (£379 million). UK domestic spend was £24 million or 6% of the total H1 film production spend.
- 22 HETV productions began principal photography in H1 2020 with a total UK spend of £296 million, 60% lower than for H1 2019.
- When the film and HETV productions which were planned to start production in H1 but were postponed due to the COVID-19 lockdown are taken into account, the total spend of productions in H1 2020 would have risen from £699 million to £1.87 billion. This would have been the largest H1 combined film and HETV production spend in the UK ever reported.

2. Film production in the UK

The COVID-19 pandemic triggered a substantial disruption to the production of films and high-end television projects globally. As it spread in the UK across the first and second quarter of the year, a government imposed lockdown meant all productions which were filming were halted and scheduled projects saw their shoot start date delayed. During the second quarter of 2020 almost no production activity was undertaken, other than a handful of micro-budget features (some post-production, VFX and animation work was able to continue). As a consequence, production statistics for H1 2020 show only minor variances from those reported in the Q1 production statistical release.

The total number of films that started principal photography during H1 2020 was 41 compared to 65 during the same period in 2019. The total UK production spend for H1 2020 was £403 million, 54% less than the £880 million UK production spend for H1 2019. Inward investment and co-production films accounted for 94% of the total spend this year (£379 million) compared to 87% for the same period last year (£769 million). UK spend on domestic films was £23.5 million. For the same period last year domestic spend was £112 million.

Inward investment films that started filming in H1 included 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 Maju*, an Indian inward investment comedy directed by Prem Raj Soni.

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, H1 2020

	UK spend £ million	Number of features
Domestic UK features	23.5	26
Inward Investment and co-productions	379.4	15
Total	**402.9**	**41**

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) and post-production in the UK
Note: Figures for H1 2020 have been impacted by the postponement of productions at the end of Q1 in response to the COVID-19 pandemic.

Spend across the latest 12 month rolling period July 2019 – June 2020 was £1,288 million. This is 35% lower than the total film spend of £1,978 million reported for 2018 –2019 (Table 2). As previously highlighted, COVID-19 halted or postponed productions over three months of the current 12 month rolling period.

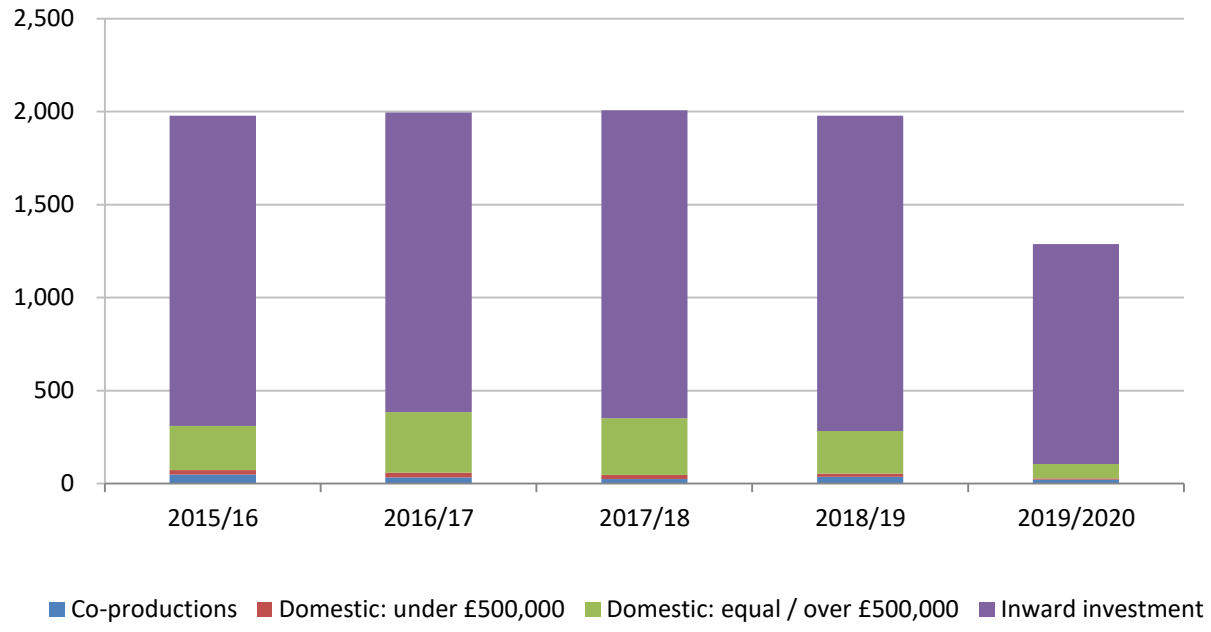
Table 2 UK spend (£) of features produced in the UK, 2015/2016 to 2019/2020

	Rolling Years: July to June				
	2015/16	**2016/17**	**2017/18**	**2018/19**	**2019/20**
Co-productions	49.3	33.9	25.6	37.0	21.1
Domestic UK features	261.8	350.6	325.6	246.7	84.0
Of which budget ≥ £500,000	238.0	325.3	303.9	230.2	77.4
Of which budget <£500,000	23.9	25.3	21.7	16.5	6.6
Inward investment features	**1,666.47**	**1,610.96**	**1,655.43**	**1,694.70**	**1,182.54**
Total without films with budgets <£500,000*	1,952.5	1,968.3	1,983.7	1,960.7	1,280.7
Total	**1,977.6**	**1,995.5**	**2,006.6**	**1,978.4**	**1,287.7**

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.
Note: Figures for rolling year 2019/2020 have been impacted by the postponement of productions at the end of Q1 2020 in response to the COVID-19 pandemic.

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



Source: BFI
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A total of 159 productions started shooting across the rolling 2019/2020 period (Table 3). Of these, 60% were domestic features, 31% were inward investment productions and 9% 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	33	25	21	31	14
Domestic UK features	247	258	236	173	96
Of which budget ≥ £500,000	90	94	99	78	41
Of which budget <£500,000	157	164	137	95	55
Inward investment features	68	77	66	69	49
Total without films with budgets <£500,000*	176	185	178	172	101
Total	**348**	**360**	**323**	**273**	**159**

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) and post production in the UK
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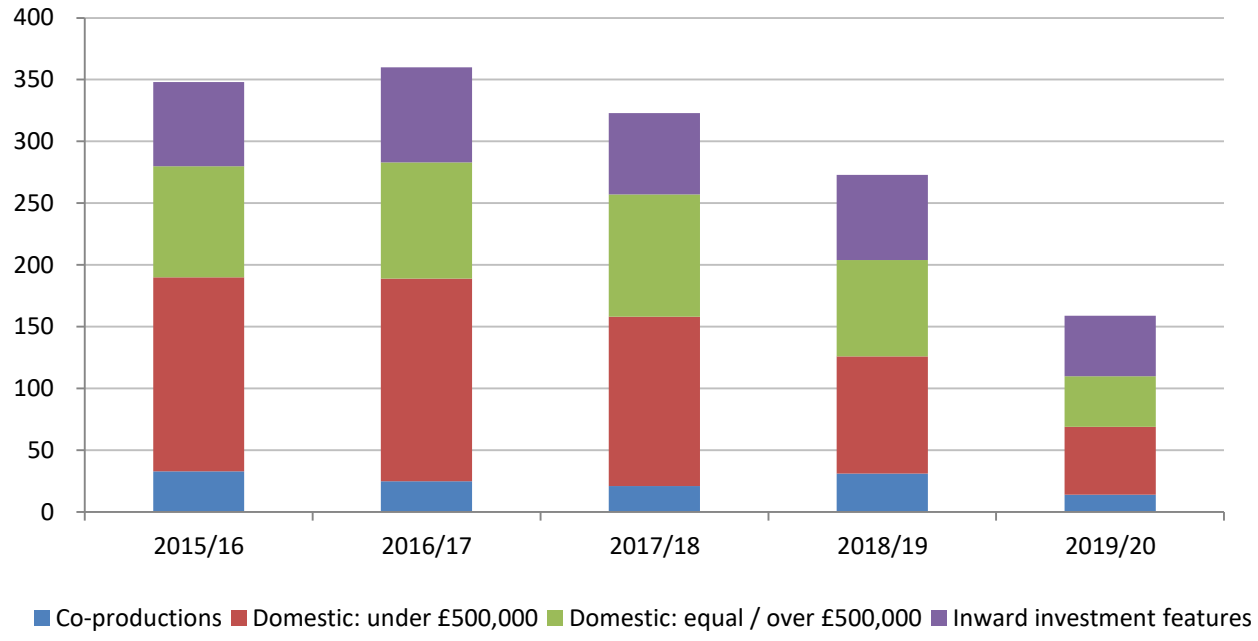

Source: BFI

Films are allocated to the calendar quarter in which principal photography started.
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3. High-end television production

Total UK spend on high-end television (HETV) productions starting principal photography during H1 2020 was £296 million from 22 productions (Table 4). This was 60% less than the £737 million figure reported for H1 2019. Domestic HETV spend was £75 million, 52% lower than the £155 million reported for the same period the previous year. UK spend on inward investment programmes was £221 million, 68% below H1 2019's £582 million total.

Table 4 Number and UK spend of high-end TV programmes, H1 2020

	UK spend £ million	Number of programmes
Domestic UK	75.0	11
Inward investment	220.8	11
Total	295.9	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.
Note: Figures for H1 2020 have been impacted by the postponement of productions at the end of Q1 in response to the COVID-19 pandemic.

HETV projects which started filming in H1 2020 included the second series in both the DC Comic's 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 5 years (2015-2020). Spend across the latest 12 months was £1.34 billion, 17% lower than the previous 12 month rolling period. The total UK spend on inward investment and co-productions was £1.06 billion. This is only 10% less than the total inward investment spend for 2018/2019, even though there was effectively just 9 months of HETV production activity during the latest period compared to a full 12 months of activity for 2018/2019. Total domestic spend was £288 million, 36% lower than the £448 million reported for 2018/2019.

Table 5 UK spend of high-end TV programmes produced in the UK, 2015/2016 to 2019/2020:

	Rolling Years: July to June				
£ millions	**2015/2016**	**2016/2017**	**2017/2018**	**2018/2019**	**2019/2020**
Domestic UK	402.4	352.9	390.6	447.6	288.3
Inward investment and co-production	444.7	645.2	1,067.9	1,168.5	1,056.5
Total	**847.2**	**998.0**	**1,458.5**	**1,616.0**	**1,344.8**

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.
Note: Figures for rolling year 2019/2020 have been impacted by the postponement of productions at the end of Q1 2020 in response to the COVID-19 pandemic.

The total number of HETV productions starting principal photography across the latest 12 months was 93. This is 47 fewer productions (-35%) than reported for the previous 12 month period when the volume of reported HETV productions reached a record high. Domestic productions accounted for 46% of the total and inward investment 54%, consistent with the proportions of the previous two rolling years.

Table 6 Volume of high-end TV programmes produced in the UK, 2015/2016 to 2019/2020

	Rolling years: July to June				
Number of productions	**2015/2016**	**2016/2017**	**2017/2018**	**2018/2019**	**2019/2020**
Domestic UK	73	69	57	*68*	43
Inward investment and co-production	36	49	70	76	50
Total	**109**	**118**	**127**	**144**	**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.
Note: Figures for rolling year 2019/2020 have been impacted by the postponement of productions at the end of Q1 2020 in response to the COVID-19 pandemic.

Appendix A:

Table 7 shows the total UK production spend for H1 periods from 2016 to 2020. For H1 2020, it reports both the spend for film and HETV production which started principal photography (actual), and that which was scheduled to start during H1, but was postponed due to the impact of COVID-19 (planned).

The estimated total value of H1 postponed UK film and HETV production was £1.17 billion. The aggregate spend of actual and planned productions for H1 2020 would therefore have been £1.87 billion. This would have been a record in terms of total H1 production spend, 15% higher than the previous highest spend, which was H1 2019 with a £1.62 billion spend.

Film productions which had to postpone commencement of principal photography included inward investment titles Disney's *The Little Mermaid* and *The Northman;* and domestic title Terence Davies' *Benediction*. Postponed HETV projects included inward investment titles *Outlander* Series 6 and the third series of *Sex Education*; and domestic titles the tenth series of *Call the Midwife* and the sixth series of *Shetland*.

Table 7 Film and HETV UK production spend (£ million), H1 2016-2020

£ millions	2016	2017	2018	2019		2020 Actual	*2020 H1 Planned*	*2020 Actual + Planned*
Film	756.2	981.5	935.8	880.7		402.9	*704.2*	*1,107.1*
HETV	280.2	302.1	486.3	736.6		295.9	*462.3*	*758.1*
Total	**1,036.4**	**1,283.6**	**1,422.1**	**1,617.3**		**698.8**	***1,166.5***	***1,865.3***

Source: BFI
Planned production spends are forecast estimates on planned date of commencement of principal photography
Totals may not sum due to rounding.
Figures for 2016 to 2019 are those reported in the H1 Official Statistics Release of that year.

Notes

1. BFI Research and Statistics Unit production tracking

The Research and Statistics Unit production tracking system attempts to track all films produced wholly or partly in the UK (i.e. it is a census, not a sample).

Sources of information include the British Film Commission, industry tracking forums, ScreenSkills, 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** (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 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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