Film, high-end television and television animation production in the UK – full year 2013 report

BFI Research and Statistics Unit

30 January 2014

In this release we report for the first time the production in the UK of high-end television (HETV) and television animation programmes, in addition to feature films. For feature film we report the full calendar year 2013. For HETV and television animation we report programmes that have been certified as British under the Cultural Test or as an official co-production under one of the UK's co-production treaties and which had a shoot date between 1 April 2013 and 31 December, when tax relief first became available for such productions. Please see *Notes* for further details. Section 1 of this report contains feature film production, section 2 HETV and section 3 television animation.

1. Total film production in the UK

The aggregate UK spend of features that commenced principal photography in 2013 was £1,075 million, up from £945 million in 2012. Inward investment films contributed £868 million, domestic UK films £152 million and co-productions £54 million. UK spend for co-productions and domestic UK films was lower in 2013 than in 2012, by £20 million and £95 million respectively. However, for inward investment films UK spend increased by £245 million. Between 2008 and 2013, UK spend peaked in 2011 at £1,325 million, with inward investment being the largest contributor (Table 1 and Figure 1).

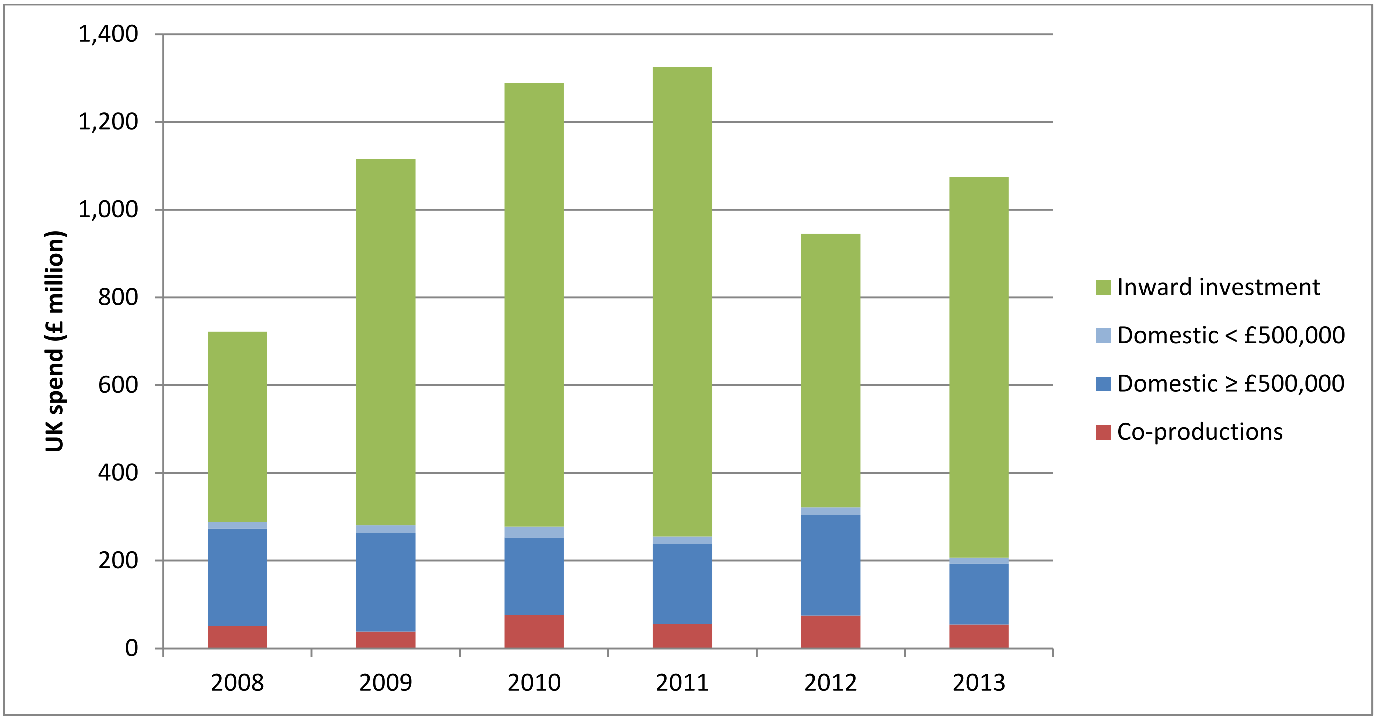
In this report, domestic feature films are broken down by budget: films with a budget greater than or equal to £500,000, in 2013 accounting for 91% of UK spend on domestic films, and films with a budget less than £500,000. Domestic films with a budget greater than or equal to £500,000 had a UK spend of £139 million in 2013, down from £229 million in 2012. Domestic films with a budget less than £500,000 had a UK spend of £14 million in 2013, down from £18 million in 2012.

Table 1 UK spend of features produced in the UK, 2008 - 2013, £ million

	2008	2009	2010	2011	2012	2013
Co-productions	51.7	38.6	76.2	55.3	74.6	54.2
Domestic UK features	236.0	242.1	201.2	199.5	247.1	152.4
Of which budget ≥ £500,000	*221.5*	*224.3*	*176.6*	*182.4*	*229.2*	*138.9*
Of which budget < £500,000	*14.5*	*17.8*	*24.6*	*17.1*	*17.9*	*13.6*
Inward investment	434.4	834.6	1,011.2	1,070.3	623.4	868.3
Total	**722.1**	**1,115.3**	**1,288.7**	**1,325.1**	**945.1**	**1,074.9**

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 year in which principal photography commenced.
Films at all budget levels are included in this analysis. For pre-2008 data restricted to films with budgets £500,000 see the BFI Statistical Yearbook2013 www.bfi.org.uk/statisticalyearbook2013.

Figure 1 Value of UK spend of inward, domestic, co-production and total features, 2008-2013



Source: BFI

In 2013, 239 films started principal photography in the UK, the lowest annual number for 2008-13. Of these, 37 were inward investment films, 166 were domestic UK features and 36 were co-productions (Table 2 and Figure 2).

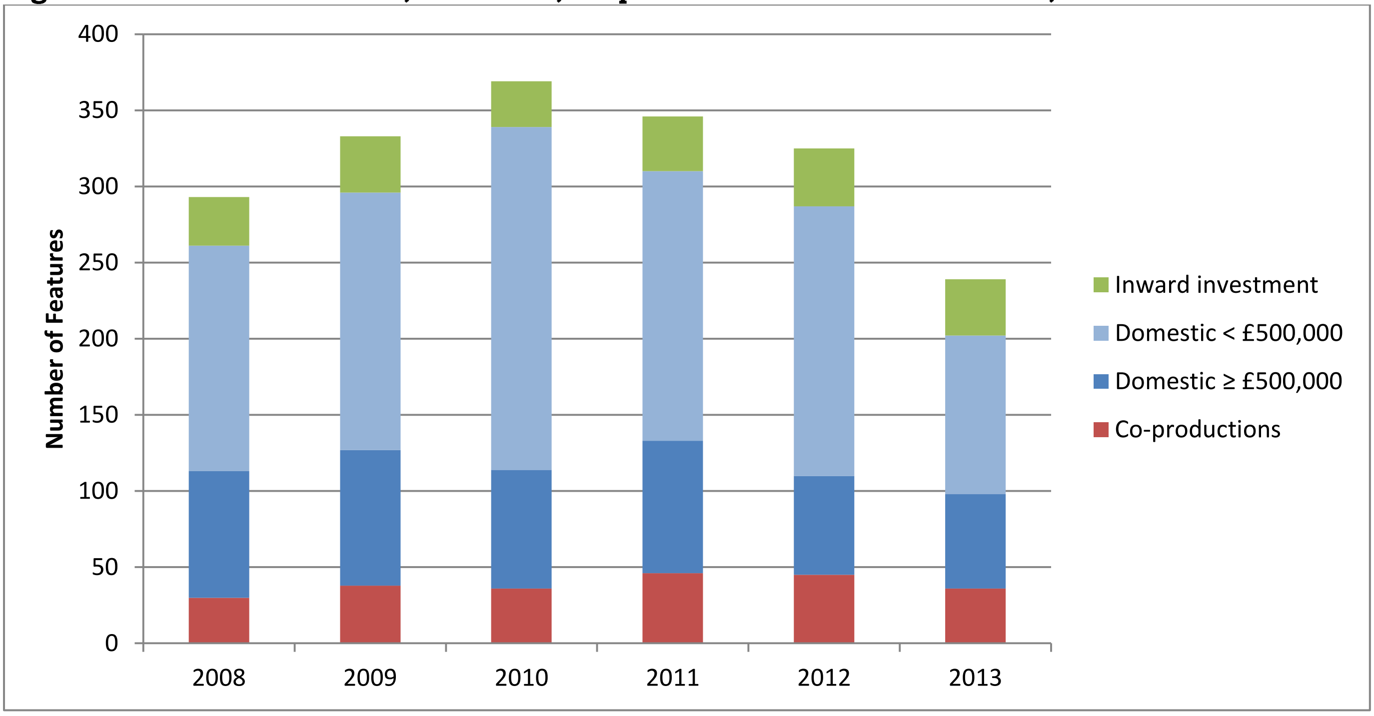
Domestic films produced with budgets greater than or equal to £500,000 decreased from 65 in 2012 to 62 in 2013 and the number of domestic films with a budget less than £500,000 are recorded as decreasing from 177 to 104. This number should however be treated as an interim result as there is a time lag in obtaining detailed information on all low and micro-budget activity in the UK. For example, for 2012 the recorded number of low budget productions increased by 23% between the January 2013 statistics release and the updated 2012 report in the 2013 Statistical Yearbook. All of the low budget domestic films were classified as UK independent films.

Table 2 Number of features produced in the UK, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Co-productions	30	38	36	46	45	36
Domestic UK features	231	258	303	264	242	166
Of which budget ≥ £500,000	*83*	*89*	*78*	*87*	*65*	*62*
Of which budget < £500,000	*148*	*169*	*225*	*177*	*177*	*104*
Inward investment	32	37	30	36	38	37
Total	**293**	**333**	**369**	**346**	**325**	**239**

Source: BFI
See notes to Table 1.

Figure 2 Number of inward, domestic, co-production and total features, 2008-2013



Source: BFI

Significant inward investment titles in 2013 included *The Guardians of the Galaxy*, *Cinderella*, *The Woman in Black: Angel of Death* and *Good People*.

Domestic UK titles in 2013 included *The Theory of Everything*, *Alan Partridge: Alpha Papa*, *Pressure* and *Pride*

Co-productions in 2013 included *Mr Turner*, *Slow West, The Trip to Italy* and *Frank*.

1.1 UK and non-UK Films

In 2013, UK films accounted for £991 million out of a total UK spend of £1,075 million, as shown in Table 3. This reflects the fact that most inward investment films that started principal photography in 2013 were UK-qualifying films.

Table 3 UK spend of UK and non-UK features produced in the UK, 2008 - 2013, £ million

	2008	2009	2010	2011	2012	2013
Non-UK films	24.3	47.7	21.9	43.3	28.1	83.7
UK films	697.8	1,067.6	1,266.8	1,281.8	917.0	991.3
Total	**722.1**	**1,115.3**	**1,288.7**	**1,325.1**	**945.1**	**1,074.9**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
UK films are those that are certified as UK or are de facto UK films by virtue of being made in whole or part in the UK by UK production companies.
Non-UK films are films that are produced and financed by overseas companies and are not certified as UK films.

Table 4 shows the production numbers for UK and non-UK films in 2008-2013. Of 239 films tracked in 2013, 232 were UK films and 7 were non-UK films. This was a decrease of 86 films from 2012. However, this number may be revised upward as more information on low budget films comes to hand.

Table 4 Number of UK and non-UK features produced in the UK, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Non-UK films	16	25	7	20	8	7
UK films	277	308	362	326	317	232
Total	**293**	**333**	**369**	**346**	**325**	**239**

Source: BFI
See notes to Table 3.

1.2 US studio and independent films

In 2013, the majority of UK spend (71%) was accounted for by US studio films, a total of £759 million (Table 5). This was an increase from £646 million in 2012, where US films accounted for 68% of UK spend. UK spend by independent films, at £315 million, was the highest of the period.

Table 5 UK spend of US studio and independent films produced in the UK, 2008 - 2013, £ million

	2008	2009	2010	2011	2012	2013
US studio films	430.8	814.4	984.5	1,039.0	646.5	759.5
Independent films	291.3	300.9	304.1	286.2	298.6	315.5
Total	**722.1**	**1,115.3**	**1,288.7**	**1,325.1**	**945.1**	**1,074.9**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
A US studio film is one where one of the major US studios (or one of its specialist subsidiaries) is involved in the production stage of the film.
An independent film is one 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.

Table 6 shows the breakdown between the number of US studio films and independent films that commenced principal photography in 2013. Throughout the period, the majority of films were independent; in 2013 there were 219 independent films (91%) compared to 20 US studio films. The number of US studio films increased from 16 in 2012 to 20 in 2013; whereas the number of independent films decreased from309, though this number may be revised upward.

Table 6 Number of US studio and independent films produced in the UK, 2008 – 2013

	2008	2009	2010	2011	2012	2013
US studio films	24	26	18	19	16	20
Independent films	269	307	351	327	309	219
Total	**293**	**333**	**369**	**346**	**325**	**239**

Source: BFI
See notes to Table 5.

1.3 Independent UK films by category

Table 7 shows the UK spend by category for independent UK films. The aggregate UK spend increased from £291 million in 2012 to £312 million in 2013. This was the highest UK spend for the period. Domestic features had the highest UK spend, being £149 million (48%), inward investment contributed £116 million and co-productions £47 million. Of domestic features, films with a budget equal to or greater than £500,000 had the greatest spend at £135 million (91%).

Table 7 UK spend of UK independent films by category, 2008 – 2013, £ million

	2008	2009	2010	2011	2012	2013
Co-productions	50.6	35.7	75.7	46.4	73.5	46.7
Domestic UK features	162.2	198.1	170.3	176.3	132.1	149.1
Of which budget ≥ £500,000	*147.7*	*180.2*	*145.7*	*159.2*	*114.2*	*135.6*
Of which budget < £500,000	*14.5*	*17.8*	*24.6*	*17.1*	*17.9*	*13.6*
Inward investment	75.4	61.7	38.2	51.8	84.9	116.0
Total	288.2	295.5	284.2	274.5	290.5	311.8

Source: BFI

Most independent UK films in 2013 were domestic UK features, at 165; there were 16 inward investment films and 32 co-productions. The number of inward investment independent UK films was the second highest in the period, after the peak in of 24 in 2012. The 2013 inward investment films were mainly independent US/UK films produced in the UK; eight of the 16 films were officially certified as UK films.

Table 8 Number of UK independent films by category, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Co-productions	28	32	35	39	42	32
Domestic UK features	226	255	301	263	236	165
Of which budget ≥ £500,000	*78*	*86*	*76*	*86*	*59*	*61*
Of which budget < £500,000	*148*	*169*	*225*	*177*	*177*	*104*
Inward investment	9	7	10	11	24	16
Total	263	294	346	313	302	213

Source: BFI
Note: Table 6 shows all independent films regardless of nationality. Table 8 shows UK independent films only.

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

The UK spend for domestic HETV for April – December 2013 was £83 million. UK spend for inward investment HETV was greater at £150 million. For disclosure reasons, the UK spend for co-productions is not reported (Table 9).

A total of 31 HETV programmes commenced principal photography in April-December 2013. Of these, 9 were inward investment, 19 were domestic HETV and 3 were co-productions. Similar to feature film, a small number of inward investment productions had the largest share of UK spend.

Table 9 UK spend and number of high-end television programmes produced in the UK, April-December 2013

	UK spend £m	Number
Co-production	*	3
Domestic UK HETV	83.2	19
Inward Investment	149.9	9
Total	*	**31**

* Fields marked with an asterisk have been suppressed to avoid disclosing budget data for individual titles
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
HETV are allocated to the period according to the date principal photography commenced.

3. Television animation – British productions and co-productions

The UK spend for domestic television animation programmes for April – December 2013 was £35 million. UK spend for inward investment was less than domestic, at £8 million. As with HETV, the UK spend for co-productions is not reported for disclosure reasons (Table 10).

A total of 23 animation programmes commenced principal photography in April-December 2013. Of these, 4 were inward investment, 17 were domestic HETV and 2 were co-productions. Unlike feature films and HETV, the small number of inward investment productions did not account for the largest share of UK spend.

Table 10 UK spend and number of television animation programmes produced in the UK, April-December 2013

	UK spend £m	Number
Co-production	*	2
Domestic UK HETV	34.6	17
Inward Investment	7.8	4
Total	*	23

* Fields marked with an asterisk have been suppressed to avoid disclosing budget data for individual titles
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.

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.

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.
Slow West

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 for individual film titles are not disclosed when the number of productions (co-production, domestic or inward) is three or less.

Pre-release Access

This release has been prepared according to the Code of Practice for Official Statistics published by the UK Statistics Authority (2009). Pre-release access has been granted to the following:

Amanda Nevill, Chief Executive, BFI
Tim Cagney, Deputy Chief Executive, BFI
Ben Roberts, Director, Film Fund, BFI
Carol Comley, Head of Strategic Development, BFI
Isabel Davis, Head of International, BFI
Chris Travers, Director of Communications, Marketing and Audiences, BFI
Nick Mason Pearson, Director of Press & Public Affairs, BFI
Emma Hewitt, Head of Press & PR, BFI
Anna Mansi, Head of Certification, BFI.
Jane Glastonbury, Department for Culture, Media and Sport
James Butler, Department for Culture, Media and Sport
Ken Hunt, Department for Culture, Media and Sport
Adrian Wootton, Chief Executive, Film London and the British Film Commission
Samantha Perahia, Senior Production Executive, British Film Commission
Colette Geraghty, Press & Communications Manager, Film London

Statistical contact details

This release was prepared by Alex Tosta, Research and Statistics Unit, BFI, alex.tosta@bfi.org.uk, tel +44 (0)20 7957 4815

(end)