Film, high-end television and animation programmes production in the UK: full-year 2018

BFI Research and Statistics Unit

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Key points

- In 2018, 202 feature films started principal photography in the UK, with a total spend in the UK of £1,924 million.
- 2018 is the second highest recorded figure since measurement began in 1994. However it is a decrease (11%) from the record high of £2,153 million in 2017.
- However this figure is slightly higher (1%) than the production spend for 2017 (£1,911 million) reported at the corresponding point in time a year ago. As such this year's £1,924 million is the highest figure ever reported when like for like (January published) annual figures are compared.
- 51 films were inward investment productions. These accounted for 84% of the UK spend, contributing £1,604 million to the total.
- 119 high-end television productions started principal photography in 2018, with a total UK spend of £1,173 million, an increase from £1,130 million in 2017 and the highest since records began with the introduction of the high-end television tax relief in 2013.
- UK spend on high-end television productions generated by inward investment and co-production was £795 million, the second highest amount since analysis began.
- 20 animation programmes started principal photography in 2018, with a total UK spend of £40 million a decrease from £71 million in 2017.

1. Total film production expenditure in the UK

The aggregate UK spend of features that started principal photography in 2018 was £1,924 million, the second highest figure since measurement began in 1994. However, this is a decrease of 11% from the record high of £2,153 million in 2017. Inward investment films contributed £1,604 million (83% of total), domestic UK films £295 million (17%), and co-productions £24 million (1%). UK spend year on year decreased by £247 million for inward investment films, increased by £43 million for domestic UK films and decreased by £8 million for co-productions (Table 1 and Figure 1).

However the 2018 production spend figure is slightly higher (1%) than the corresponding figure for 2017 (£1,911 million) which was published at the same time last year. As such this year's £1,924 million is the highest ever spend figure when the like for like figures are compared on the basis of the date of publication More information on like for like published figures is given in the appendix to this release.

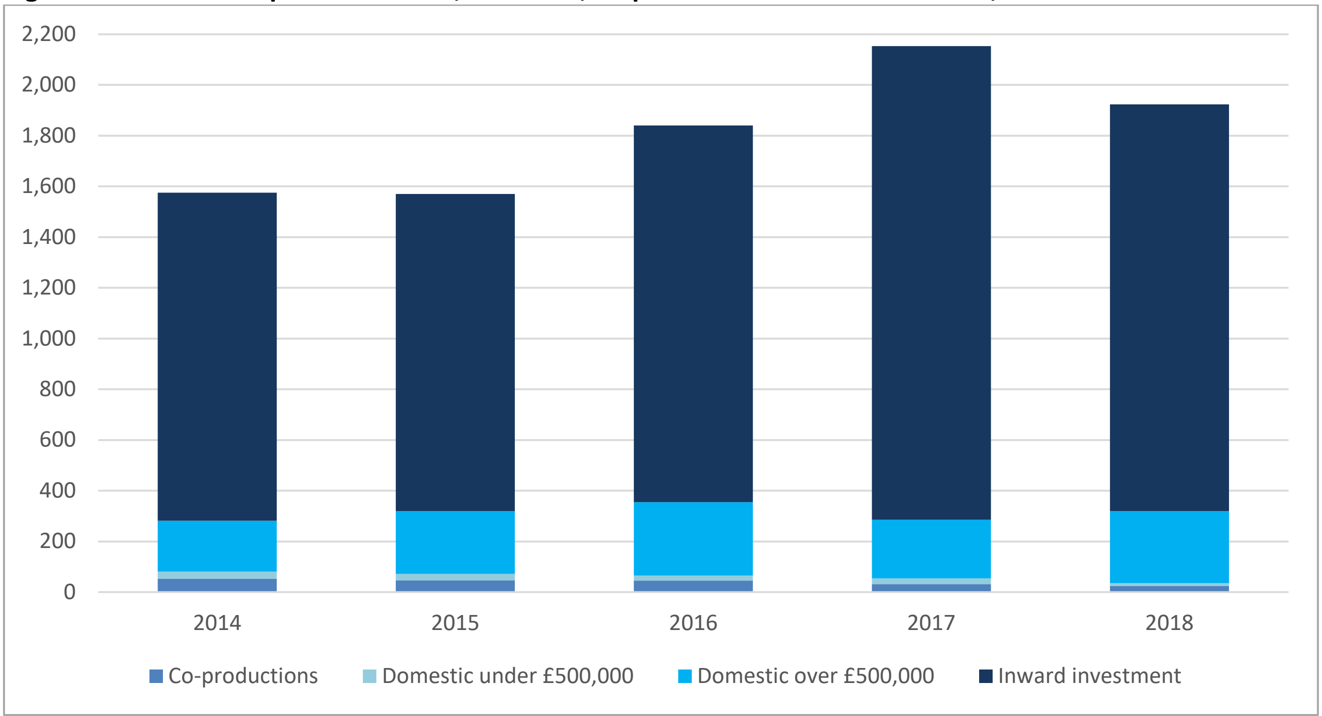
Domestic films budgeted at £500,000 and above had a UK spend of £284 million, up 23% from £252 million in 2017, and accounted for 96% of the spend on domestic films. Domestic films with a budget less than £500,000 had a UK spend of £12 million in 2018, down from £22 million in 2017. However all these numbers should be treated as interim figures which are likely to increase, as there is a time lag in obtaining detailed information on production activity in the UK particularly for low and micro budget features. Consolidated figures will be produced during the course of this year.

Table 1 UK spend of features produced in the UK, 2014-2018, £ million

	2014	2015	2016	2017	2018
Co-productions	53.6	47.3	45.3	32.0	24.0
Domestic UK features	227.6	272.1	309.1	252.7	295.3
Of which budget < £500,000	*27.3*	*25.0*	*20.7*	*21.9*	*11.5*
Of which budget ≥ £500,000	*200.3*	*247.1*	*288.3*	*230.8*	*283.9*
Inward investment	1,293.5	1,250.3	1,485.3	1,868.5	1,604.3
Total excluding films with budget <£500,000	1,545.2	1,542.3	1,818.2	2,130.1	1,912.0
Total	**1,574.7**	**1,569.7**	**1,839.7**	**2,153.2**	**1,923.7**

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 year in which principal photography started.
Films at all budget levels are included in this analysis.

Figure 1 Value of UK spend of inward, domestic, co-production and total features, 2014-2018



Source: BFI

In 2018, 202 films started principal photography in the UK. Of these, 51 were inward investment films, 132 were domestic UK features, and 20 were co-productions (Table 2 and Figure 2). Both the number of domestic and inward investment productions was lower than 2017.

In last year's release (Film and other screen sectors production in the UK 2017) the number of films reported for 2017 was 211 which has subsequently been revised in this release to 315 as more information has become available. It is likely that this year's total of 201 will be revised upwards therefore it is not necessarily direct evidence of a decline in the production of domestic features in the UK. Please see Appendix for a further explanation and direct comparison of data as published at the end of each year.

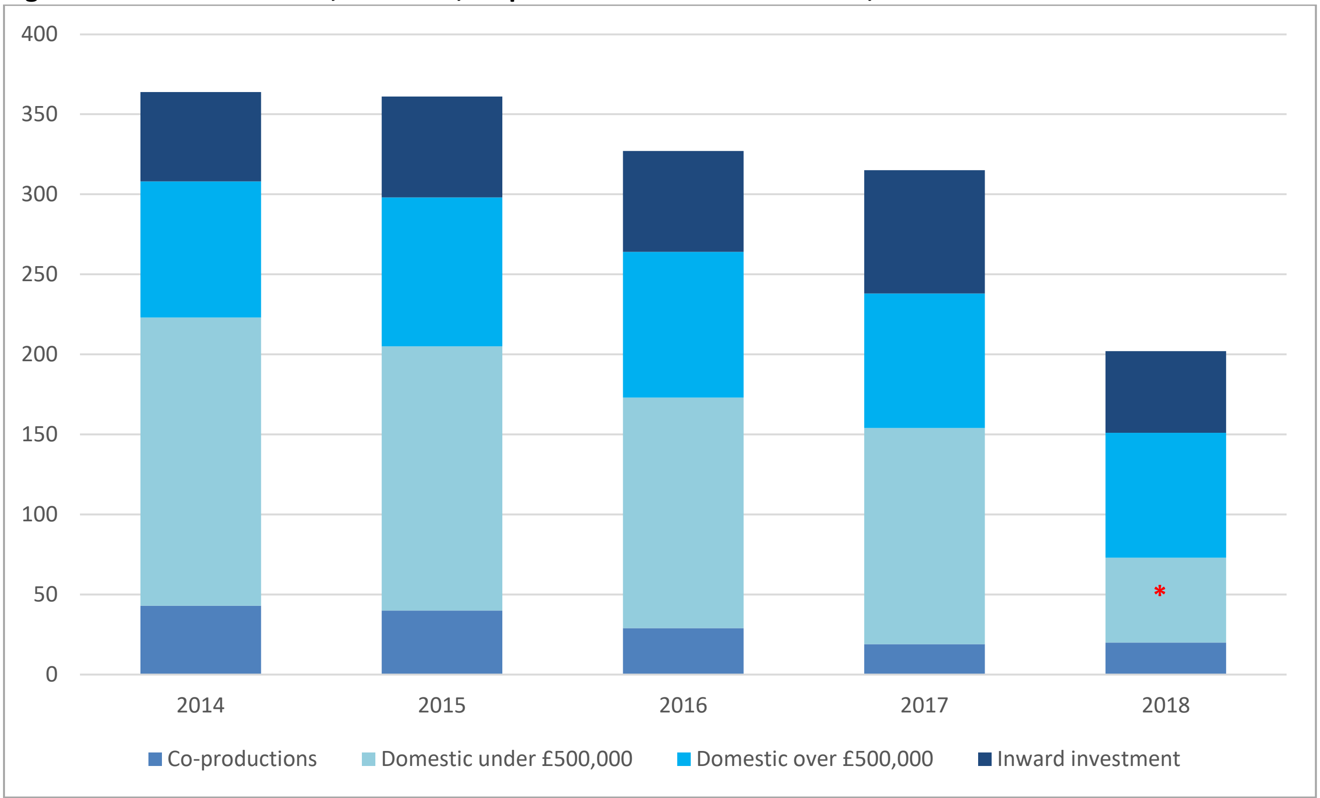
Domestic films produced with budgets less than £500,000 decreased from 135 in 2017 to 53 in 2018, and the number of domestic films with a budget greater than or equal to £500,000 decreased from 84 to 78. Again, these numbers should be treated as an interim result, as there is a time lag in obtaining detailed information on all low and micro-budget activity in the UK. See Appendix for more detail.

Table 2 Number of features produced in the UK, 2014-2018

	2014	2015	2016	2017	2018
Co-productions	43	40	29	19	20
Domestic UK features	265	258	235	219	131
Of which budget < £500,000	*180*	*165*	*144*	*135*	*53*
Of which budget ≥ £500,000	*85*	*93*	*91*	*84*	*78*
Inward investment	56	63	63	77	51
Total excluding films with budget <£500,000	167	174	174	174	147
Total	**364**	**361**	**327**	**315**	**202**

Source: BFI
See notes to Table 1.

Figure 2 Number of inward, domestic, co-production and total features, 2014-2018



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.

A broad range of films started principal photography in 2018 and which include: *Cats, Star Wars: Episode IX, Last Christmas, Misbehaviour, Shaun the Sheep Movie: Farmageddon, Sorry We Missed You, Dirty God, Horrible Histories, Little Joe* and *Special Couple.*

1.1 US studio and independent films

In 2018, the majority of UK spend (71%) was accounted for by films backed by the major US studios, a total of £1,430 million (Table 3). This was a decrease from £1,543 million in 2017, where US films accounted for 72% of UK spend.
UK spend by independent films was £494 million in 2018 down from £610 million in 2017. Independent inward investment films contributed the largest amount of the UK spend with £236 million (48%), domestic independent films had an increase to £235 million and also accounted for 48% of the total independent UK spend.

Table 3 UK spend of US studio and independent films produced in the UK, 2014 - 2018, £ million

	2014	2015	2016	2017	2018
US studio films	1,017.2	1,155.0	1,198.8	1,543.5	1,429.7
Independent films	557.5	414.8	640.9	609.6	494.0
Of which Co-productions	*53.6*	*47.3*	*40.0*	*32.0*	*22.9*
Of which Domestic	*210.6*	*232.5*	*309.1*	*224.8*	*235.3*
Of which inward investment	*293.4*	*134.9*	*291.8*	*352.9*	*235.8*
Total	**1,574.7**	**1,569.7**	**1,839.7**	**2,153.2**	**1,923.7**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
The notes section at the end of this release provides information on film definitions.

Table 4 shows the breakdown between the number of US studio films and independent films that started principal photography in 2018. Throughout the period, the majority of films were independent; in 2018 there were 179 independent films (89%) compared to 23 US studio films. The number of US studio films produced in the UK has been fairly stable since 2008 with 2015 being the highest number with 24 films.

The number of independent films decreased from 295 in 2017, though this number is likely to be revised upward as more information on low and micro-budget productions becomes available.

Table 4 Number of US studio and independent films produced in the UK, 2014 – 2018

	2014	2015	2016	2017	2018
US studio films	17	24	17	20	23
Independent films	347	337	310	295	179
Of which co-productions	*43*	*40*	*28*	*19*	*18*
Of which domestic	*264*	*257*	*235*	*218*	*130*
Of which inward investment	*40*	*40*	*47*	*58*	*31*
Total	**364**	**361**	**327**	**315**	**202**

Source: BFI
The notes section at the end of this release provides information on film definitions.

2. High-end television

Total UK production spend for high-end television titles (HETV) was £1,173 million in 2018 an increase of 4% from £1,129 million in 2017. UK spend on co-productions and inward investment programmes has decreased by 2% from 2017 however they continue to account for the highest UK spend with £795 million the second highest amount since analysis began. The vast majority of the programmes in this category are inward investment with very few co-productions, however the amounts have been combined in previous years to avoid disclosing budgets. Domestic HETV accounted for £378 million, a 19% increase from £319 million in 2017 which was the lowest year since analysis began (Table 5).

For comparison the like for like figure published in January 2017 for total UK spend was £938 million, which has subsequently be revised up to £1,130 million as more information became available.

Table 5 UK spend on high-end television programmes produced in the UK, 2014-2018 (£ million)

	2014	2015	2016	2017	2018
Co-production & inward investment	282.2	431.6	594.2	810.7	794.5
Domestic UK HETV	357.8	426.4	369.2	318.7	378.0
Total	**640.0**	**858.0**	**963.4**	**1,129.5**	**1,172.6**

Source: BFI
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
HETV are allocated to the period according to the date principal photography started.

A total of 119 HETV titles started principal photography in 2018 a 9% increase from 109 in 2017. Of these, 64 were co-productions and inward investment an increase from 56 in 2016, 55 were domestic HETV, the same as in 2017. These figures are higher (9%) than 2017 and again may increase due time lag in obtaining detailed information on all production activity in the UK.

For comparison the like for like figure published in January 2017 for total number of HETV programmes was 91, which has subsequently be revised up to 109 as more information became available.

Table 6 Number of high-end television programmes produced in the UK, 2014-2018

	2014	2015	2016	2017	2018
Co-production & inward investment	30	28	43	56	64
Domestic UK HETV	65	69	69	53	55
Total	**95**	**97**	**112**	**109**	**119**

Source: BFI
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
HETV are allocated to the period according to the date principal photography started.

Titles that started principal photography in 2018 include: *Four Weddings and a Funeral, The Crown Series 3, The Mandalorin, Gangs of London, Killing Eve Series 2, World on Fire* and *The Trial of Christine Keeler.*

3. Animation programmes

At the time of reporting the UK spend for domestic television animation programmes for 2018 was £40 million. These figures are a decrease of 44% from the 2017 figure of £71 million. Domestic UK programmes accounted for £21 million (54% of total UK spend). However, the figures for 2018 are likely to change due to the time lag in obtaining detailed information on all production activity in the UK. (Table 7).

For comparison the like for like figure published in January 2017 for UK spend in 2017 was £54.1 million, which has subsequently be revised up to £70.7 million as more information became available.

Table 7 UK spend on television animation programmes produced in the UK, 2014-2018 (£ million)

	2014	2015	2016	2017	2018
Co-production & inward investment	16.3	27.1	38.2	23.1	18.3
Domestic	73.9	31.3	70.8	47.6	21.2
Total	**90.2**	**58.4**	**109.0**	**70.7**	**39.6**

Source: BFI
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
Animation programmes are allocated to the period according to the date principal photography started.

A total of 20 animation programmes started principal photography in 2018. Of these, 15 were domestic. The numbers of animation programmes are substantially down (57%) in comparison to the 46 in 2017. However again the time lag in obtaining detailed information on all production activity in the UK will likely see this change.

For comparison the like for like figure published in January 2017 for number programmes produced in 2017 was 21, which has subsequently be revised up to 46 as more information became available.

Table 8 Number of television animation programmes produced in the UK, 2014-2018

	2014	2015	2016	2017	2018
Co-production & inward investment	17	16	17	9	5
Domestic	44	37	47	37	15
Total	**61**	**53**	**64**	**46**	**20**

Source: BFI
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
Animation programmes are allocated to the period according to the date principal photography started.

Titles that started production in 2018 include: *Norm of the Forest, Jessy & Nessy, Hey Duggee Series 3, Bing Series 4, Go Jetters Series 3* and *Clangers Series 3.*

Appendix

As explained in the main body of the report, there is always a time-lag with the availability of data affecting the reporting of all production spend figures, particularly for film production. This time lag means that there is a risk of misinterpreting trend for the current year compared with the previous years due to the subsequent updates for 2017 and earlier.

For years prior to 2018 the analysis in these statistical releases includes data which is refreshed as additional and more accurate information becomes available, meaning that additional projects are identified for previous years. Therefore apparent trends need to be viewed with the understanding that the latest data being reported will always be updated subsequently.

The impact of having full trend information is demonstrated by Table A and Figure A below.

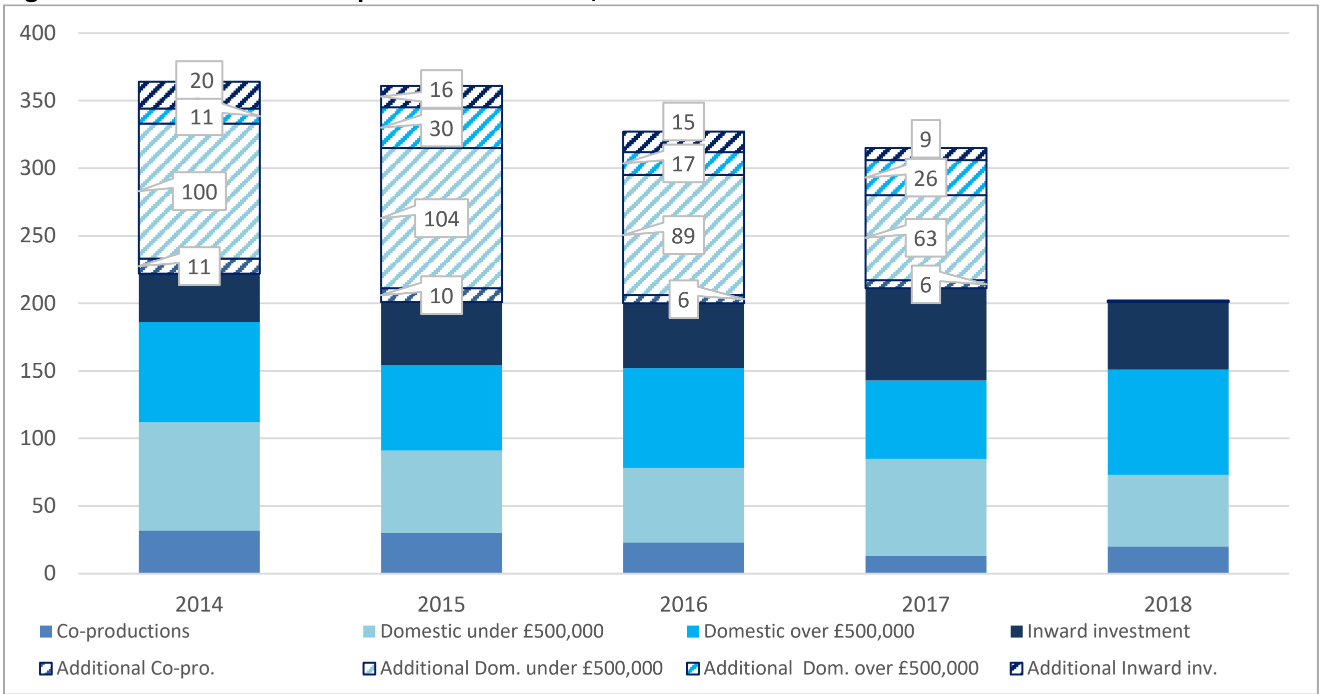
Table A below shows data for calendar years as published at the time of release, i.e. at the end of each calendar years these were the numbers of films reported. This allows a real-time direct comparison of the slate of films starting principal photography in each year, year on year. The overall trend is a fairly consistent picture of the volume of production starts over the past five years.

Table A Number of features produced in the UK, 2014 to 2018 as published in year-end stats of that year

	2014	2015	2016	2017	2018
Co-productions	32	30	23	13	20
Domestic UK features	154	124	129	130	131
Of which budget < £500,000	*80*	*61*	*55*	*72*	*53*
Of which budget ≥ £500,000	*74*	*63*	*74*	*58*	*78*
Inward investment features	36	47	48	68	51
Total	**222**	**201**	**200**	**211**	**202**

Figure A displays the reported numbers from Table A – the base data – with the addition of production data which has been finalised and reported post the publication of the statistics for a particular period, therefore showing the full slate of films in production as shown in Figure 2. This aims to aid show the effect of the time-lag in obtaining complete data, and how the data in this report for full year 2018 should be regarded as interim. This is especially relevant when looking at domestic UK features with a budget of less than 500,000.

Figure A Number of features produced in the UK, 2014 to 2018



Source: BFI

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

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 Full Year 2018 (Publication Date; 7th February 2018).

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 reliefs. 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 Digital, 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 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. Statistical contact details

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