Film, high-end television and animation programmes production in the UK: full-year 2019

BFI Research and Statistics Unit

31 January 2020

Key points

- The combined total spend on film and high-end TV production in the UK for 2019 was £3,616 million, a 16% increase from the £3,122 million spend in 2018 and the highest UK production spend figure ever reported.
- 188 films began principal photography in the UK in 2019 with a total UK production spend of £1,951 million – 6% higher than for 2018. The like for like figure in 201 8was 202 films.
- 2019's total UK film production spend is the second highest amount since records began in 1994, coming behind a record £2,210 million in 2017.
- 71 films were inward investment films (12 more than in 2018) with a total spend of £1,742 million and accounting for 89% of the total film production spend.
- 94 films were domestic UK features with a total UK spend of £175 million, a 45% decrease in spend on 2018. 23 were co-production features with a spend of £34 million, a 37% increase on 2018.
- 123 high-end television productions started principal photography in 2019, four more titles than reported at the same time last year Total UK production spend was £1,665 million, a significant 29% increase from £1,287 million on 2018, and the highest since reporting began.
- There were 74 inward investment and high-end TV co-productions in 2019 with a total spend of £1,294 million, representing 78% of the total high-end spend and 51% higher than in 2018. Domestic high-end television production spend was £372 million.
- 23 animation programmes started principal photography in 2018, with a total UK spend of £39 million.

1. Total film production expenditure in the UK

The overall spend of films starting principal photography in 2019 was £1,951 million, a 7% increase on the 2018 total and the second highest figure since measurement began. The 2017 total film spend of £2,210 million remains the highest recorded to date. 2017's total film expenditure at the corresponding time of statistical release publication was £1,910 million, therefore the interim 2019 total reported here is 2% higher on like-for-like publication reporting terms.

Inward investment features contributed £1,742 million (89% of total), domestic UK films £175 million (9 % of total), and co-productions £34 million (2%). This year's inward investment expenditure was £256 million more than in 2018, or a 17% year-on-year increase. It was the second highest inward expenditure on record, 2017 being the highest at £1,910 million.

The UK spend of domestic films budgeted at £500,000 and above was £165 million, £138 million less than in 2018 and representing a 46% decrease. The like-for-like spend figure at the time of publication for 2018 was £284 million. Domestic films with a budget less than £500,000 had a UK spend of £9.9 million, down from £15.9 million in 2018 (£11.5 million at the time of publication last year).

Co-production spend was £34 million, an increase of £9 million or 37% against 2018's co-production spend.

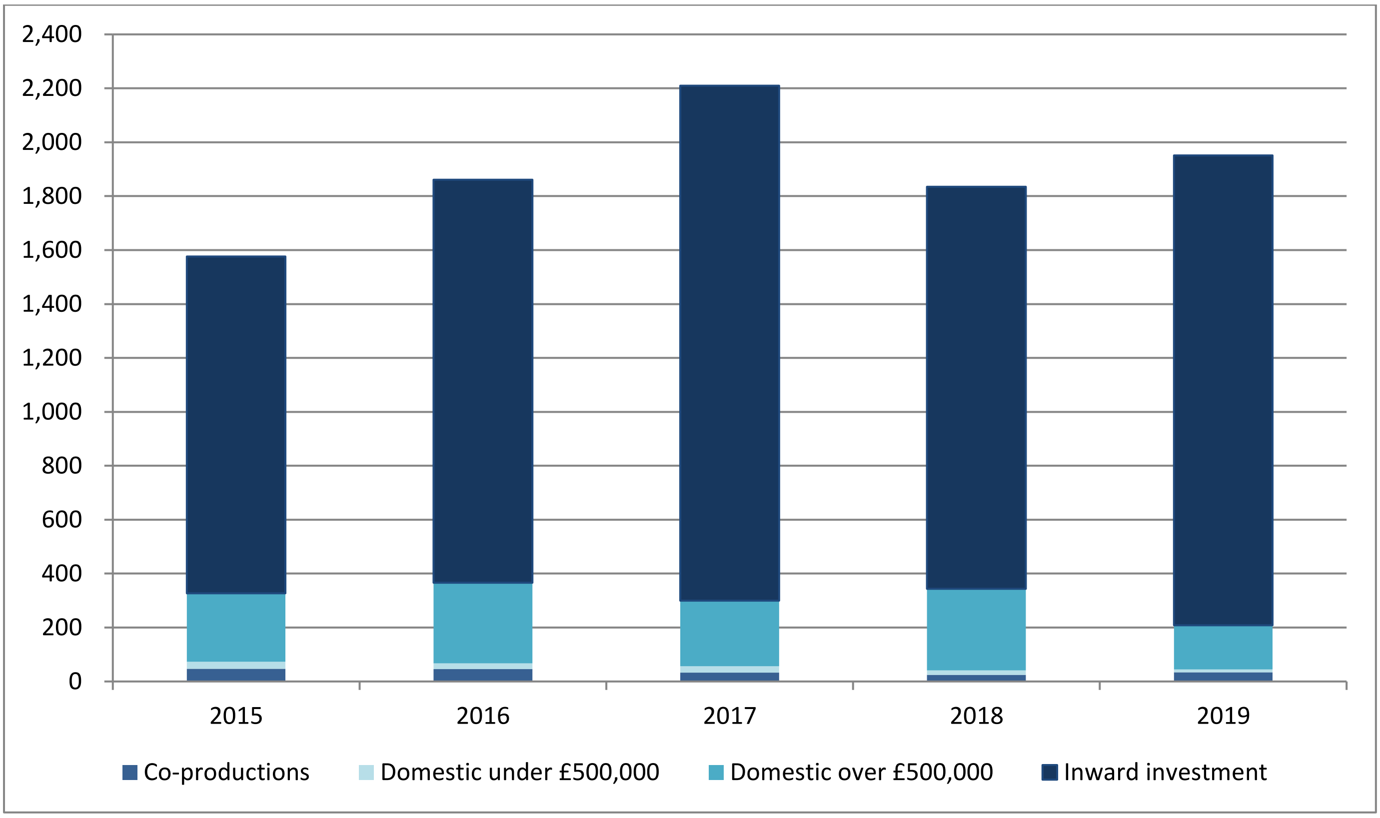
These 2019 interim spend figures are likely to increase, based on the time-lag in obtaining detailed information on production activity in the UK, notably for lower and micro budget film features. The data below for previous years reflects updated totals.

Table 1 UK spend of features produced in the UK, 2015-2019, £ million

	2015	2016	2017	2018	2019
Co-productions	47.3	45.4	32.2	25.0	34.2
Domestic UK features	279.2	320.6	267.6	318.7	174.7
Of which budget ≥£500,000	*253.4*	*299.1*	*242.8*	*302.8*	*164.7*
Of which budget < £500,000	*25.8*	*21.5*	*24.8*	*15.9*	*9.9*
Inward investment features	**1,249.2**	**1,495.6**	**1,910.4**	**1,490.9**	**1,741.9**
Total without films with budgets <£500,000*	**1,547.3**	**1,839.3**	**2,183.4**	**1,818.8**	**1,941.1**
Total	**1,575.7**	**1,861.5**	**2,210.3**	**1,837.6**	**1,950.8**

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, 2015-2019



Source: BFI

In 2019, 188 feature films began principal photography in the UK. Of these, 94 were domestic UK films, 71 were inward investment features and 23 were co-productions.

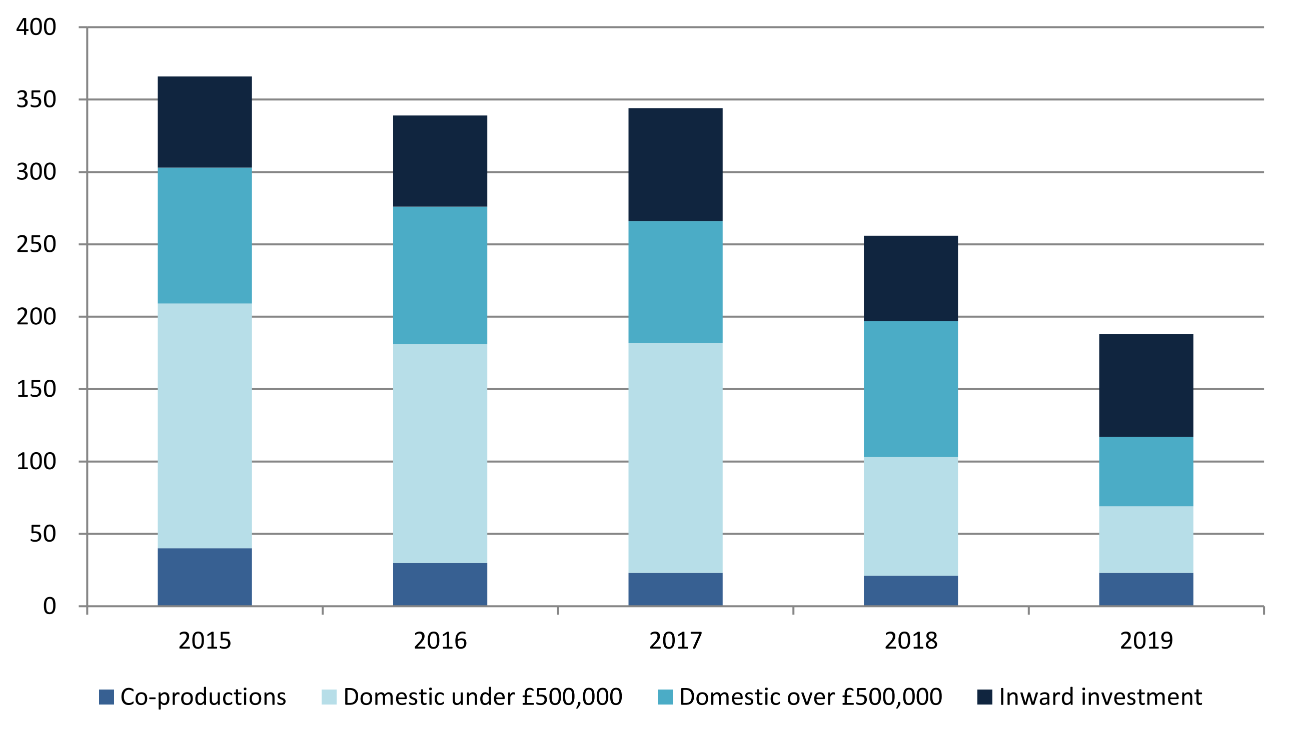
In last year's release (Film and other screen sector productions in the UK 2018) the number of films reported for 2018 was 202 which has subsequently been revised upwards to 257. The volume of smaller domestic films (budgets under £500,000) was revised upwards from 55 to 82. Larger budget domestic film (budgets of £500,000 or more) was revised upwards by 16 features since 2019 publication, and inward investment has been revised from 51 to 60 features. Revisions have also occurred to the volume of smaller domestic productions reported for the years 2015 to 2017. This is due to a number of factors, including the longer production periods of smaller budget films for which information to track their activity at the start of production is often unavailable.

Table 2 Number of features produced in the UK, 2015-2019

	2015	2016	2017	2018	2019
Co-productions	40	30	23	21	23
Domestic UK features	263	246	243	176	94
Of which budget ≥ £500,000	*94*	*95*	*84*	*94*	*49*
Of which budget < £500,000	*169*	*151*	*159*	*82*	*46*
Inward investment features	**63**	**63**	**78**	**59**	**71**
Total without films with budgets <£500,000*	**197**	188	185	174	142
Total	**366**	**339**	**344**	**257**	**188**

Source: BFI
See notes to Table 1.

Figure 2 Number of inward, domestic, co-production and total features, 2015-2019



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.

Films which started their principal photography during 2019 included the inward investment titles *No Time to Die, Cruella, Morbius, The Witches, Infinite* and *Tenet.* 2019 domestic productions included *Ammonite, Supernova, Dream Horse, Pixie* and *The Souvenir Part 2* whilst co-productions starting principal photography were *Skylines* and *The Father*.

1.1 US studio and independent films

In 2019, 72% of the total UK spend was accounted for by US Studio-backed productions with £1,409 million, which is 9% higher than in 2018 when £1,293 million accounted for 70% of total spend.

Spend on the UK by independent films was £547 million in 2019, equivalent to 2018's £541 million total (which was revised upwards from the £494 million total at publication). The composition of independent films spend in the UK in 2019 was 67% inward investment (£368 million), 27% domestic (£145 million) and 6% co-productions (£34 million). The 2019 independent inward investment total is the highest since records began and reflects a threefold increase in spend over five years.

Table 3 UK spend of US studio and independent films produced in the UK, 2015 - 2019, £ million

	2015	2016	2017	2018	2019
US studio films	1,169.5	1,214.5	1,662.3	1,293.2	1,404.3
Independent films	406.2	647	548	541.4	546.5
Of which co-productions	*47.3*	*40.0*	*32.1*	*23.7*	*34.0*
Of which domestic	*240*	*321.1*	*239.9*	*259.0*	*144.47*
Of which inward investment	*118.9*	*285.9*	*276.0*	*258.7*	*367.8*
Total	**1,575.7**	**1,861.5**	**2,210.3**	**1,834.6**	**1,950.8**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
The tables in revised data, based on adjustments to previous periods
The notes section at the end of this release provides information on film definitions.

Table 4 shows the split in the volume of independent films and US studio-backed films which began principal photography in 2019. As in previous years, the majority of productions were independent films; in 2019 there were 167 independent films (89%) and 21 US studio films (11%).

The number of independent films currently reported shows a decrease in volume of productions compared to last year, from 234 in 2018 to 167 in 2019. The variance is due in part to the delay in obtaining smaller domestic production information. The 2019 interim volume total will be revised upward as more information becomes available. The like for like figure for the number of independent films in the equivalent 2018 release was 179.

Table 4 Number of US studio and independent films produced in the UK, 2015 – 2018

	2015	2016	2017	2018	2019
US studio films	25	19	26	23	21
Independent films	341	320	318	234	167
Of which co-productions	*40*	*29*	*23*	*19*	*23*
Of which domestic	*262*	*246*	*242*	*175*	*93*
Of which inward investment	*39*	*45*	*53*	*40*	*51*
Total	**366**	**339**	**344**	**257**	**188**

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

2. High-end television

The overall UK production spend for high-end television titles (HETV) in 2019 was £1,665 million (Table 5). This is 29% increase on the £1,287 million spend in 2018.

The UK spend on co-productions and inward investment HETV was £1,294 million or 78% of the total HETV spend. This is a 51% uplift in spend on the £854 million recorded for 2018 and is the highest HETV inward investment and co-production spend recorded since reporting began. Note that the vast majority of the programmes in this category are inward investment with very few co-productions, thus spends have been combined, as in previous years, to avoid disclosing budgets.

Domestic HETV accounted for £372 million; this interim spend is a 14% decrease from £433 million in 2018. However, 2019's interim domestic production total is comparable to the like-for-like 2018 statistical release published spend, which was £378 million.

Table 5 UK spend on high-end television programmes produced in the UK, 2015-2019 (£ million)

	2015	2016	2017	2018	2019
Domestic UK	422.1	360.5	358.5	433.3	371.7
Inward investment and co-production	439.1	603.9	857.3	854.0	1,293.5
Total	**861.2**	**964.4**	**1,215.8**	**1,287.3**	**1,665.2**

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.

In 2019, 123 HETV titles started principal photography in the UK. Of these, 74 were inward investment and co-production programmes, accounting for 60% of the total, and 49 were domestic productions. As with film data, the number of HETV productions is expected to increase as additional programme information becomes available. For comparison the like-for-like figure published in January 2018 for the total number of HETV programmes was 119, which has subsequently been revised up by an additional 23 productions to a total of 142.

Table 6 Number of high-end television programmes produced in the UK, 2015-2019

	2015	2016	2017	2018	2019
Domestic UK	68	68	59	70	49
Inward investment and co-production	29	44	59	72	74
Total	**97**	**112**	**118**	**142**	**123**

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.

HETV productions starting principal photography in 2019 include the inward investment titles *Avenue 5* (10 x 60 *minutes), Black Narcissus* (3 x 60 minutes), *Brave New World* (10 x 60 minutes), *Bridgerton* (8 x 60 minutes) and *The Spanish Princess Season 2* (8 x 60 minutes). 2019 domestic high-end television productions included *Domina* (10 x 60 minutes), *Cobra* (6 x 60 minutes), *A Suitable Boy* (6 x 60 minutes*).The North Water* (6 x 45 minutes) was a 2019 HETV co-productions.

3. Animation programmes

The 2019 UK production spend for animation programmes was £39 million. Whilst this is 31% lower than the 2018 total of £57 million, it is equal to the figure reported in the equivalent 2018 statistical release (£40 million). The split of 2019's domestic to inward investment and co-production was similar to the 2018 split with 54% of the expenditure coming from domestic productions and 46% from inward and co-productions.

Table 7 UK spend on television animation programmes produced in the UK, 2015-2019 (£ million)

	2015	2016	2017	2018	2019
Co-production & inward investment	27.7	44.2	38.3	29.7	18
Domestic	31.1	73.1	51.8	27	21.3
Total	**58.8**	**117.3**	**90.1**	**56.7**	**39.3**

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 23 animation programmes started principal photography in 2019, 16 domestic and 7 inward or co-production. The volume of 2018 animation productions now accounted for is 50 titles: at the time of reporting in the equivalent 2019 release, the volume of animation programmes was 20, so we would also expect to see the 2019 figures revised upward in later releases.

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

	2015	2016	2017	2018	2019
Co-production & inward investment	16	19	13	10	7
Domestic	38	48	44	40	16
Total	**54**	**67**	**57**	**50**	**23**

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.

Animation titles starting production in 2019 included the inward investment title *Pinkalicious & Peteriffic*, Series 2 (50 x 11 minutes) and the co-productions *Bear Grylls Young Adventurer 1 and 2 (2 x 70 minutes)* and *Alva and the Trolls (52 x 11 minutes)*. *Love Monster* (54 x 7 minutes) and *Dog Loves Books* (52 x 7 minutes) were two of the domestic animated series to start in 2019.

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 2019and earlier.

For years prior to 2019 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.

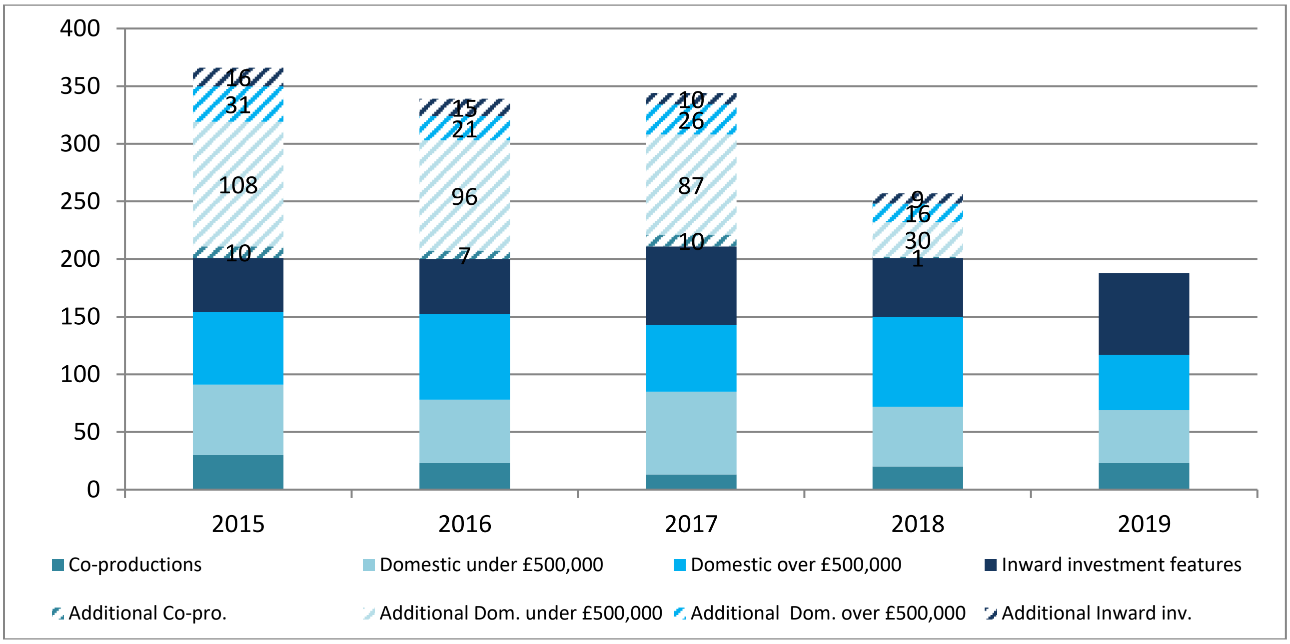
Table A below shows data for calendar years as published at the time of release, i.e. at the end of each calendar years these were the numbers of films reported. This allows a real-time direct comparison of the slate of films starting principal photography in each year, year on year.

Table A Number of features produced in the UK, 2015 to 2019 as published in year-end stats of that year

	2015	2016	2017	2018	2019
Co-productions	30	23	13	20	23
Domestic UK features	124	129	130	131	94
Of which budget < £500,000	*61*	*55*	*72*	*53*	*46*
Of which budget ≥ £500,000	*63*	*74*	*58*	*78*	*48*
Inward investment features	47	48	68	51	71
Total	**201**	**200**	**211**	**202**	**188**

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 2019 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, 2015to 2019



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 2019 (Publication Date; 6th February 2020).

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

This release was prepared by Paul McEvoy, Research and Statistics Unit, BFI,
paul.mcevoy@bfi.org.uk tel +44 (0)20 7173 3296
(end)