STATISTICAL YEARBOOK 2019

Welcome to the 2019 BFI Statistical Yearbook. Compiled by the Research and Statistics Unit, this Yearbook presents the most comprehensive picture of film in the UK and the performance of British films abroad during 2018. This publication is one of the ways the BFI delivers on its commitment to evidence-based policy for film. We hope you enjoy this Yearbook and find it useful.

The BFI is the lead organisation for film in the UK. Founded in 1933, it is a registered charity governed by Royal Charter. In 2011, it was given additional responsibilities, becoming a Government arm's-length body and distributor of Lottery funds for film, widening its strategic focus.

The BFI now combines a cultural, creative and industrial role. The role brings together activities including the BFI National Archive, distribution, cultural programming, publishing and festivals with Lottery investment for film production, distribution, education, audience development, and market intelligence and research.

The BFI Board of Governors is chaired by Josh Berger.

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Research and Statistics Unit
British Film Institute
21 Stephen Street
London
W1T 1LN

Email: rsu@bfi.org.uk

T: +44 (0)20 7173 3248

www.bfi.org.uk/statistics

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Registered address:
21 Stephen Street
London
W1T 1LN

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FILM AT THE CINEMA

Image: *Avengers: Infinity War* ©Marvel Studios 2018

Facts in focus

UK BOX OFFICE RECEIPTS IN 2018

£1.28 billion

Up **0.2%** on 2017

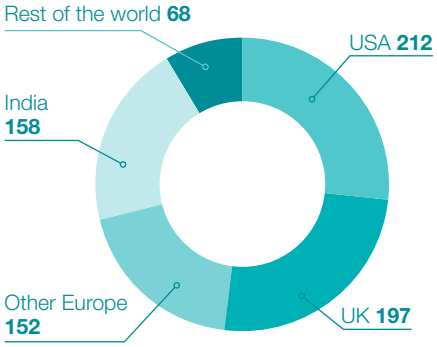
UK CINEMA ADMISSIONS IN 2018

177 million

Up 3.7% on 2017

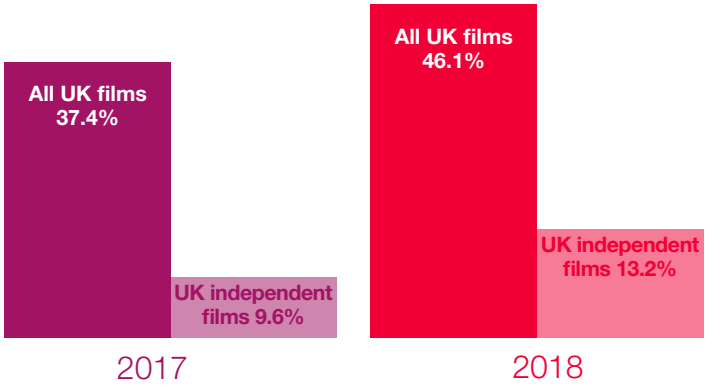
The highest attendances since 1970

ORIGIN OF FILM RELEASES



787 feature films released in the UK and Republic of Ireland

BOX OFFICE SHARE OF UK FILMS



TOP GROSSING FILM

Avengers: Infinity War

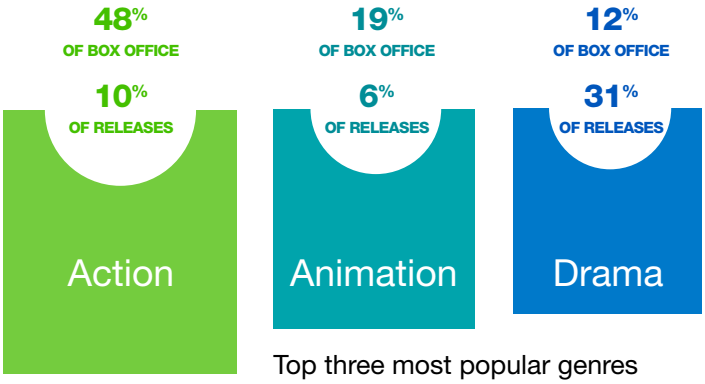
£71m

Darkest Hour

£24m

TOP GROSSING UK INDEPENDENT FILM

RELEASES BY GENRE



Top three most popular genres

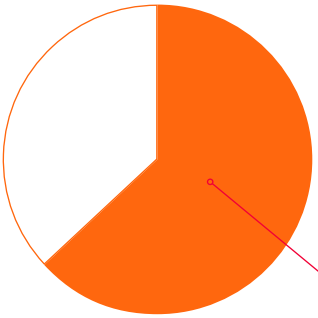
RELEASES BY CLASSIFICATION

£531 million

'12A' films had the **largest** box office gross

42% Films classified as '15' accounted for **the largest share** of releases

SPECIALISED FILMS



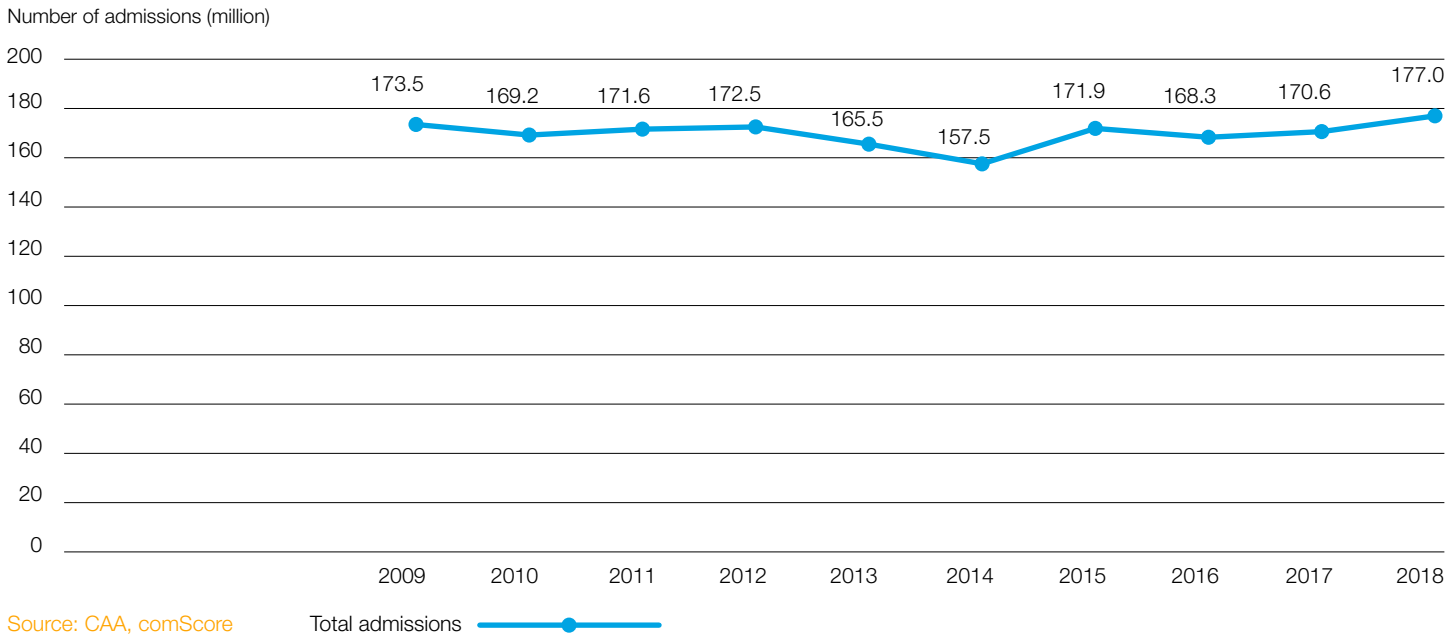
Documentaries, foreign language films and re-releases of classic/archive titles made up **58%** of all film releases; they grossed **£39.5 million**, a **3%** share of **total box office**

Film at the cinema

ADMISSIONS

2018 was a stand-out year for cinema admissions in the UK with ticket sales reaching 177 million, up 3.7% on 2017, and the highest total since 1970. The figure points to a growing appetite among British audiences for the big screen experience at a time when the range of competing entertainment options continues to multiply. In six of the 10 years between 2009 and 2018 (Figure 1) annual cinema visits topped 170 million, compared to only two out of 10 in the previous 10-year period.

Figure 1 Annual UK cinema admissions, 2009-2018



Source: CAA, comScore

Of the five major European Union (EU) territories, the UK was the only one that saw an increase in admissions compared with 2017. Attendances were down in France (-4.0%), Germany (-13.9%), Spain (-2.9%) and Italy (-7.0%). According to European Audiovisual Observatory estimates, total admissions in the EU decreased by 3% to 955 million. This is 29.4 million less than in 2017, and the fourth lowest level recorded in the EU since 2009. This downward trend in admissions was also seen in the largest European territories outside the EU, with decreases recorded in both Russia (-5.6%) and Turkey (-1.1%).

In contrast to the decline in attendances across much of Europe, year-on-year admissions increased in the world's three largest theatrical markets: China (6.0%), India (2.4%) and North America (4.8%). It should be noted that the figures for Indian admissions in both 2017 and 2018 have been calculated on the basis of a revised methodology, so are not directly comparable with the data published in the previous edition of the Yearbook. Outside of the three biggest markets, 2018 saw declines in many of the other major global territories, including Mexico (-4.6%), South Korea (-1.8%), Japan (-3.3%) and Brazil (-10.0%).

Table 1 Admissions in selected global territories, 2017 and 2018 (ranked by 2018 admissions)

Territory	Admissions 2017 (million)	Admissions 2018 (million)	+/- 2017 (%)
China	1,620.0	1,717.0	6.0
India	1,429.0	1,463.0	2.4
USA and Canada	1,242.7	1,302.9	4.8
Mexico	348.0	332.0	-4.6
South Korea	219.9	216.0	-1.8
France	209.4	201.1	-4.0
Russia	212.2	200.3	-5.6
UK	170.6	177.0	3.7
Japan	175.0	169.2	-3.3
Other Western Europe	168.1	163.6	-2.7
Brazil	181.2	163.0	-10.0
Indonesia	119.4	130.1	8.9
Germany	122.3	105.4	-13.9
Spain	100.2	97.3	-2.9
Italy	99.6	92.6	-7.0
Other Central and Eastern Europe	87.0	87.5	0.6
Turkey	71.2	70.4	-1.1
Poland	56.6	59.7	5.5

Source: CAA, BFI, European Audiovisual Observatory, IHS Markit

Notes:

Includes all global territories with more than 100 million admissions and all European territories with more than 50 million admissions.

Other Western Europe comprises: Austria, Belgium, Denmark, Finland, Greece, Iceland, Republic of Ireland, Luxembourg, Malta, Netherlands, Norway, Portugal, Sweden and Switzerland.

Other Central & Eastern Europe comprises: Bosnia and Herzegovina, Bulgaria, Cyprus, Czech Republic, Estonia, Greece, Croatia, Georgia, Hungary, Lithuania, Latvia, Montenegro, Romania, Slovenia and Slovakia.

Table 2 shows the UK admissions total broken down by month. Six months (January, May, June, August, October and November) recorded higher admissions than the equivalent period in 2017. August and October recorded the year's largest month-on-month increases (both up 33% on 2017). August saw the highest admissions for the entire year at 19.2 million, which is the greatest attendance total for any month since August 2011 when 21.4 million tickets were sold. August's top earning films included four titles released in July but which continued to earn substantial revenues throughout the month - *Mamma Mia! Here We Go Again, Mission: Impossible - Fallout, Incredibles 2* and *Hotel Transylvania 3: A Monster Vacation*. All four of these films were among top 20 films of the year. The top earning films released in October included *Bohemian Rhapsody, A Star Is Born, Venom* and *Johnny English Strikes Again,* the first three of which were among the top 20 films of the year.

Table 2 Monthly UK cinema admissions, 2017 and 2018

Month	2017 (million)	2018 (million)	% +/- on 2017
January	15.0	16.2	8.0
February	16.5	16.1	-2.3
March	16.2	13.5	-16.2
April	15.6	15.5	-0.9
May	11.3	13.7	21.0
June	9.6	10.4	8.6
July	17.8	15.6	-12.3
August	14.5	19.2	32.8
September	10.8	10.1	-6.0
October	12.1	16.0	32.6
November	14.1	14.8	5.4
December	17.2	15.7	-8.7
Total	**170.6**	**177.0**	**3.7**

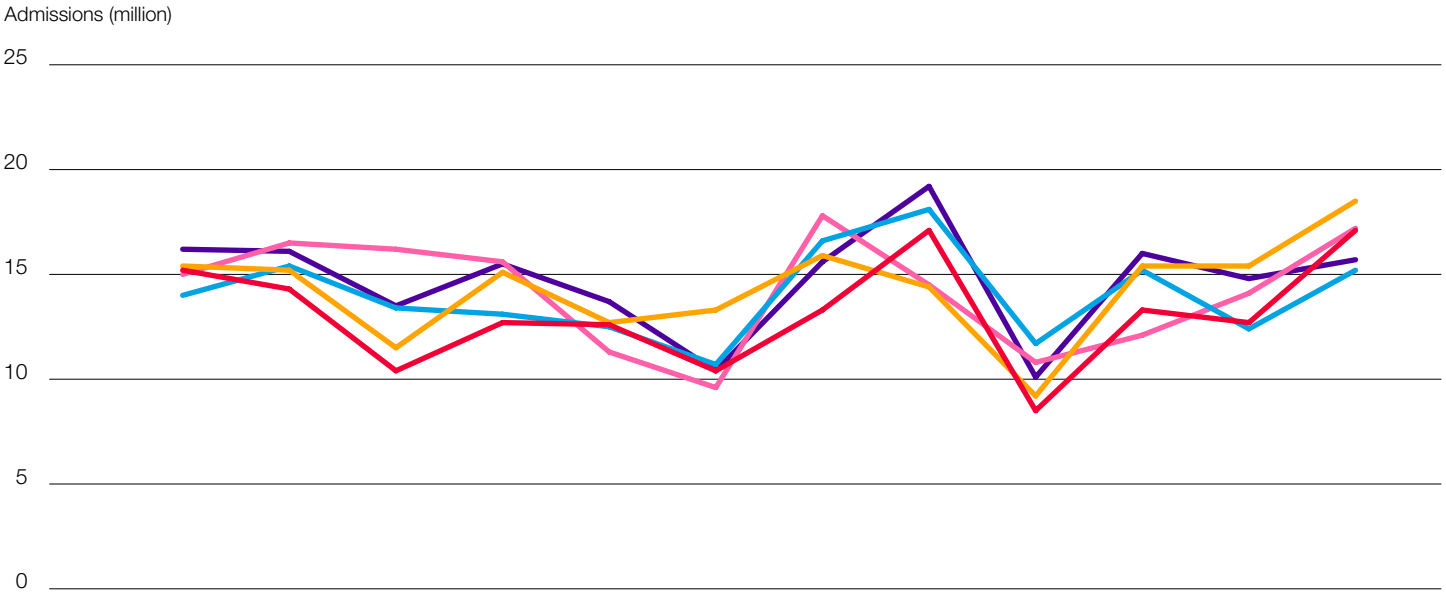
Source: CAA, comScore

Note: Figures may not sum to totals due to rounding.

Image: *Hotel Transylvania 3: A Monster Vacation* ©2018 CTMG Inc. All rights reserved

Looking at monthly admissions since 2014, Figure 2 shows there is a broadly similar pattern year on year with attendances peaking during the school and festival holiday periods when people have more time to go to the cinema.

Figure 2 Monthly UK cinema admissions, 2014-2018



	January	February	March	April	May	June	July	August	September	October	November	December	Total
2014	15.2	14.3	10.4	12.7	12.6	10.4	13.3	17.1	8.5	13.3	12.7	17.1	**157.5**
2015	15.4	15.2	11.5	15.1	12.7	13.3	15.9	14.4	9.2	15.4	15.4	18.5	**171.9**
2016	14.0	15.4	13.4	13.1	12.5	10.7	16.6	18.1	11.7	15.2	12.4	15.2	**168.3**
2017	15.0	16.5	16.2	15.6	11.3	9.6	17.8	14.5	10.8	12.1	14.1	17.2	**170.6**
2018	16.2	16.1	13.5	15.5	13.7	10.4	15.6	19.2	10.1	16.0	14.8	15.7	**177.0**

Source: CAA

Table 3 shows how the 2018 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). The UK's most populous region, London, accounted for the highest share of admissions (22.6%) followed by the South and South East and the Midlands (with 12.3% and 12.0% respectively). Together these three regions accounted for almost half (47%) of all cinema admissions in 2018. In terms of average admissions per head of population, cinema-going is highest in London, Central Scotland and Northern Ireland and lowest in the West and Border regions.

Overall, the pattern of national and regional admissions has remained largely unchanged over the last decade. It is worth noting, however, that while London accounts for the highest number of attendances each year its share of the total has recently begun to fall; it was 25.5% in 2013.

Table 3 Cinema admissions by ISBA TV region, 2018

Region	Admissions (million)	%	Population (million)*	Admissions per person
London	40.0	22.6	13.4	3.0
South and South East	21.7	12.3	7.5	2.9
Midlands	21.3	12.0	8.8	2.4
North West	17.5	9.9	7.1	2.5
Yorkshire	15.3	8.6	6.4	2.4
East of England	14.5	8.2	4.9	2.9
Central Scotland	11.3	6.4	3.8	3.0
Wales	7.8	4.4	3.1	2.5
North East	7.0	4.0	2.7	2.6
Northern Ireland	5.9	3.3	1.9	3.2
West	5.7	3.2	3.1	1.9
South West	4.3	2.4	1.8	2.4
Northern Scotland	3.4	1.9	1.3	2.6
Border	1.1	0.6	0.6	1.8
Total	**177.0**	**100.0**	**66.4**	**2.7**

Source: CAA, comScore

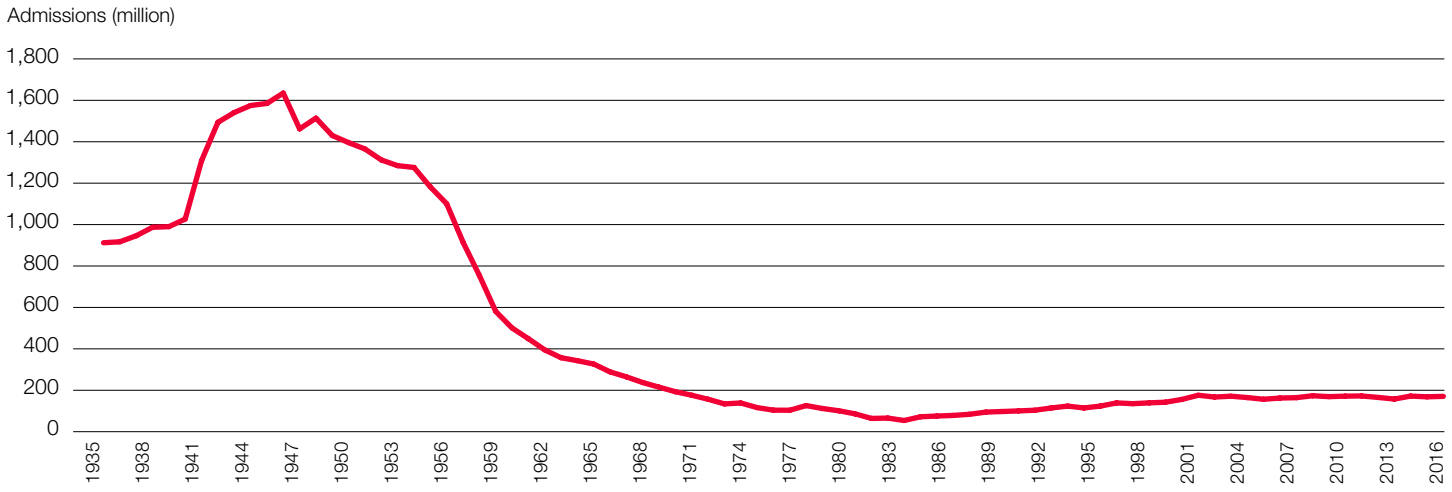
Notes:

Figures/percentages may not sum to totals due to rounding.

* BARB/Ipsos Connect Establishment Survey data for all individuals, Annual Data Report, ITV Areas

Figure 3 puts UK admissions in a longer term perspective. Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as incomes rose and new leisure activities became available. The largest competition came from the growth of television which allowed audiences to satisfy their appetite for screen entertainment in the comfort of their own homes. As cinema admissions fell so did the supply of screens, which led to further falling demand and more cinema closures. By the 1980s the number and quality of the remaining cinemas were at an all-time low. The introduction of the VCR in the same decade had a further negative impact on admissions and the nadir was reached in 1984 with cinema-going down to an average of one visit per person per year. However, the introduction of multiplex cinemas to the UK from 1985 onwards reversed the trend and ushered in a new period of growth which saw admissions returning to levels last seen in the early 1970s. The renewed enthusiasm for cinema-going in the UK reached a significant milestone in 2018, with attendances at a near 50-year high.

Figure 3 Annual UK admissions, 1935-2018



Year	Admissions (million)
1935	912.3
1936	917.0
1937	946.0
1938	987.0
1939	990.0
1940	1,027.0
1941	1,309.0
1942	1,494.0
1943	1,541.0
1944	1,575.0
1945	1,585.0
1946	1,635.0
1947	1,462.0
1948	1,514.0
1949	1,430.0
1950	1,395.8
1951	1,365.0
1952	1,312.1
1953	1,284.5
1954	1,275.8
1955	1,181.8
1956	1,100.8
1957	915.2
1958	754.7
1959	581.0
1960	500.8
1961	449.1
1962	395.0

Year	Admissions (million)
1963	357.2
1964	342.8
1965	326.6
1966	288.8
1967	264.8
1968	237.3
1969	214.9
1970	193.0
1971	176.0
1972	156.6
1973	134.2
1974	138.5
1975	116.3
1976	103.9
1977	103.5
1978	126.1
1979	111.9
1980	101.0
1981	86.0
1982	64.0
1983	65.7
1984	54.0
1985	72.0
1986	75.5
1987	78.5
1988	84.0
1989	94.5
1990	97.4

Year	Admissions (million)
1991	100.3
1992	103.6
1993	114.4
1994	123.5
1995	114.6
1996	123.5
1997	138.9
1998	135.2
1999	139.1
2000	142.5
2001	155.9
2002	175.9
2003	167.3
2004	171.3
2005	164.7
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6
2012	172.5
2013	165.5
2014	157.5
2015	171.9
2016	168.3
2017	170.6
2018	177.0

Source: BFI, CAA, comScore

UK BOX OFFICE EARNINGS

According to comScore, the total UK box office gross for 2018 was £1.28 billion, a slight increase on the previous record set in 2017. This total covers all box office earnings during calendar year 2018 for cinema screenings in the UK tracked by comScore. Since 2009 there has been an upward trend in UK box office earnings; the overall gross for 2018 was 36% higher than in 2009 (Table 4).

The growth in box office between 2017 and 2018 (0.2%) was considerably smaller than the year-on-year increase in admissions (3.7%) shown in Table 1. This is partly due to a fall in the average ticket price, the first recorded annual decrease since our analysis began in 2002. (Trends in ticket prices are reported more fully in the Distribution and exhibition chapter.)

Table 4 UK box office trends, 2009-2018

Year	Box office gross (£ million)	Change on previous year %	Change since 2009 %
2009	944	-	-
2010	988	4.7	4.7
2011	1,040	5.3	10.2
2012	1,099	5.7	16.4
2013	1,083	-1.5	14.7
2014	1,063	-1.8	12.6
2015	1,242	16.8	31.6
2016	1,228	-1.1	30.1
2017	1,279	4.2	35.5
2018	1,282	0.2	35.8

Source: comScore

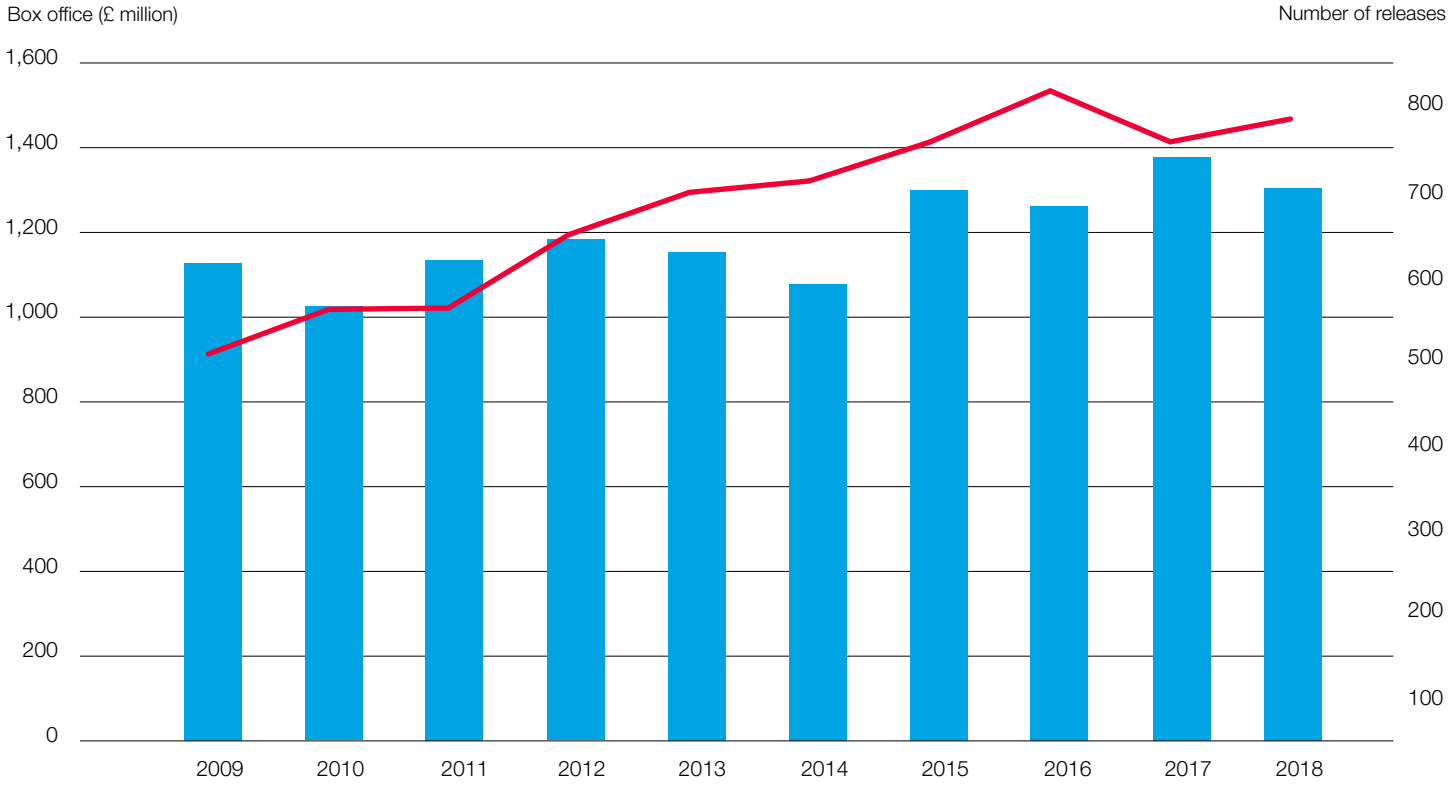
Note: Data updated since publication of the 2018 Statistical Yearbook.

FILM RELEASES AND BOX OFFICE REVENUES IN THE UK AND REPUBLIC OF IRELAND

In 2018, 787 films (an average of over 15 per week) were released for a week or more in the UK and Republic of Ireland, 27 more than in 2017, and the second highest figure of the period 2009-2018. These films generated £1.3 billion in box office revenues, second only to the record high achieved in 2017 (£1.4 billion). The figure of £1.3 billion differs from the £1.28 billion in the previous section because it includes revenues generated in 2018 by films released in 2017 and covers the Republic of Ireland as well as the UK, which distributors usually treat as a single distribution territory. The subsequent analysis in this chapter includes all titles released in 2018 and includes revenues generated up to 21 February 2019.

Figure 4 shows the annual totals for the number of releases and box office gross between 2009 and 2018. Although there is an upward trend in both the number of films exhibited and theatrical revenues over the period, there is little correlation between the two. In 2018, for example, while the number of releases increased by 4% compared with 2017, there was a 5% decrease in overall gross box office.

Figure 4 Revenues and releases at the UK and Republic of Ireland box office, 2009-2018



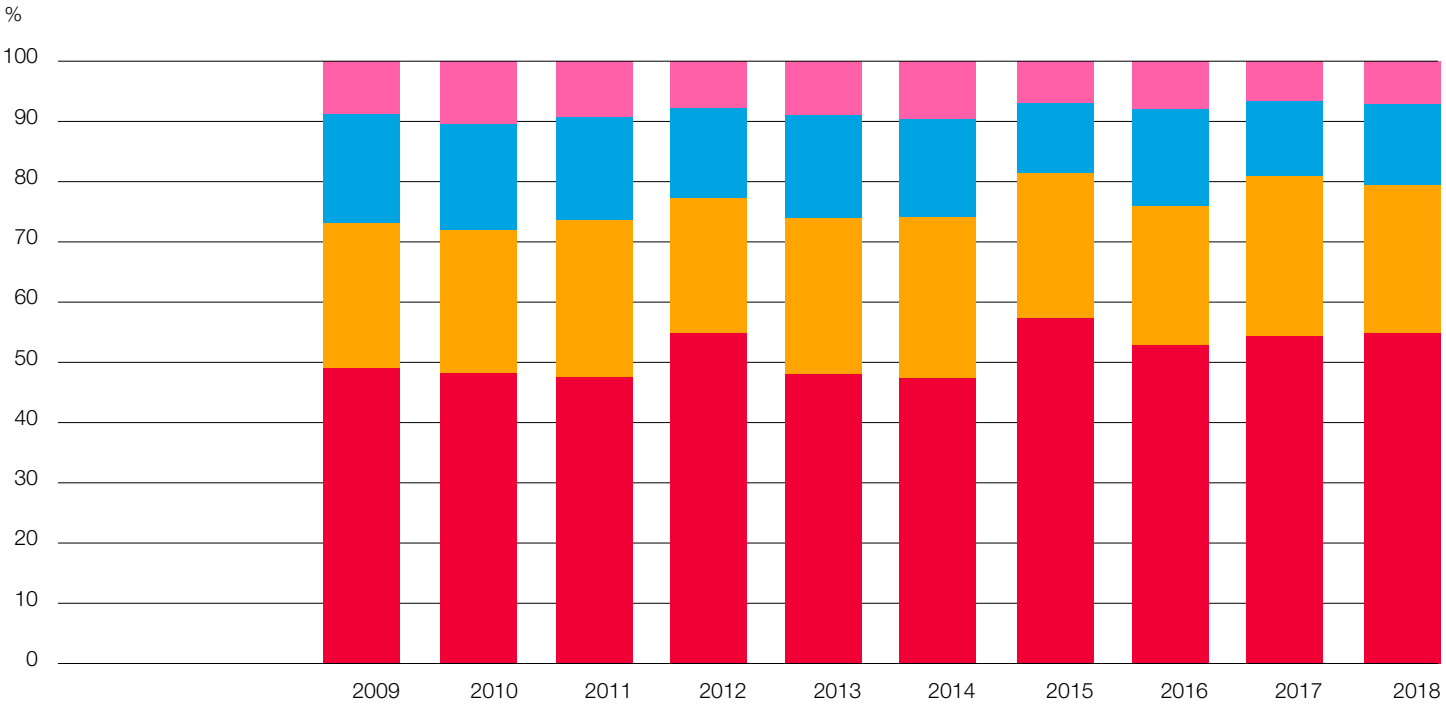
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Gross box office (£ million)	1,126.7	1,023.6	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9	1,304.8
Number of releases	503	557	558	647	698	712	759	821	760	787
Average revenue per release (£ million)	2.2	1.8	2.0	1.8	1.7	1.5	1.7	1.5	1.8	1.7

Source: comScore, BFI RSU analysis

Note: Box office up to and including 21 February 2019.

As Figure 5 shows, the market share of the top 50 highest grossing films has been relatively stable since 2009, accounting on average for around 75% of box office revenues. However, in both 2015 and 2017, the box office share of the top 50 films was 81%, mainly due to the success of some very high earning titles such as *Star Wars: The Force Awakens* (£123 million) and *SPECTRE* (£95 million) in 2015 and *Star Wars: The Last Jedi* (£82 million) and *Beauty and the Beast* (£72 million) in 2017. The share of box office generated by the top 50 titles in 2018 was 79.5%. At just under 93%, the box office share of the top 100 films in 2018 was the second highest of the period, while the share for films outside the top 100 was the second lowest at just over 7%.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
% share of top 20	49.1	48.2	47.5	54.8	48.0	47.4	57.4	52.9	54.3	54.8
% share of 21-50	24.0	23.7	26.2	22.5	26.0	26.7	24.0	23.0	26.7	24.7
% share of 51-100	18.1	17.7	17.0	14.8	17.0	16.3	11.6	16.2	12.3	13.4
% share of rest	8.8	10.3	9.3	7.9	9.0	9.6	7.0	7.9	6.7	7.1

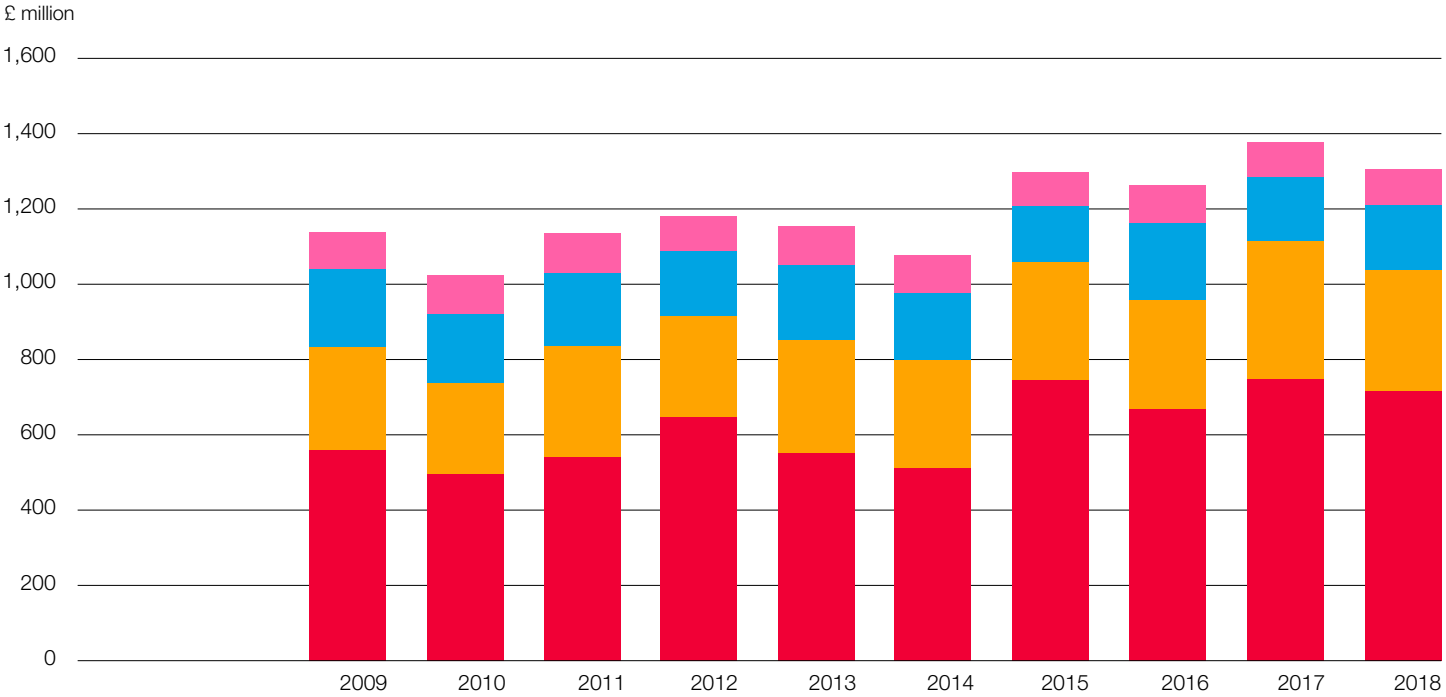
Source: comScore, BFI RSU analysis

Note: Percentages may not sum to 100 due to rounding.

Figure 6 shows that the box office generated in 2018 was up 36% compared with 2009. The takings of the top 20 film releases, the third highest of the period at £715 million, were down 4% compared with 2017 but an increase of 28% on 2009. The films ranked 21-50 earned £322 million, down 12% compared with 2017, but up 18% on 2009, while those ranked 51-100 earned £175 million, a 3% increase compared with 2017, but a 15% decline on earnings in 2009.

While there has been a general upward trend in the box office totals of the top 100 films since 2009, there has been little change in the box office generated by the remaining films released each year. As Figures 5 and 6 show, while there are variations in the actual takings and box office share for all films outside the top 100, the majority of releases are competing for a smaller share of the box office.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Box office top 20	559.3	494.6	539.3	647.9	551.1	510.7	745.6	667.7	747.1	714.9
Box office of 21-50	273.7	242.9	296.8	266.5	299.3	288.1	311.6	289.6	367.2	321.7
Box office 51-100	206.2	181.7	192.8	174.9	199.3	175.5	150.3	204.5	170.0	175.1
Box office of rest	100.8	106.1	105.6	92.9	104.0	103.5	90.9	100.2	92.2	93.1

Source: comScore, BFI RSU analysis

Table 5 shows that since 2009, while there has been an upward trend in the total number of films being released, there has been an overall downward trend in the median box office earnings for films outside the top 100. The combined box office for all films outside the top 100 in 2018 was £93 million. However this was shared by 687 titles (a median box office of £22,154) while the £101 million taken by films outside the top 100 in 2009 was split across 403 titles (a median box office of £27,902). This highlights the increasing difficulties faced by independent distributors in competing for market share but also shows their success in achieving theatrical releases for more independent films than in recent years.

Table 5 Releases and revenues of films outside the top 100, 2009-2018

	Number of films	Gross box office (£ million)	Median box office (£)
2009	403	100.8	27,902
2010	457	106.1	35,905
2011	458	105.6	34,859
2012	547	92.9	22,073
2013	598	104.0	25,790
2014	612	103.5	22,027
2015	659	90.9	19,743
2016	721	100.2	16,790
2017	660	92.2	23,803
2018	687	93.1	22,154

Source: comScore, BFI RSU analysis

WIDEST POINT OF RELEASE

Table 6 outlines the number of films released in the UK and Republic of Ireland in 2018 by the number of sites at the widest point of release (WPR). A total of 202 releases were shown at 100 sites or over (26% of all films released), while 279 films were shown at fewer than 10 sites (36% of films released). Over 74% of films were released at less than 100 sites.

Table 6 Number of releases and median box office gross by number of sites at widest point of release, 2018

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥600	15	1.9	32,667,703	11,206,531	70,808,140
500-599	43	5.5	8,955,634	1,076,446	50,570,686
400-499	40	5.1	3,273,720	436,287	15,250,247
300-399	22	2.8	765,371	202,630	3,962,885
200-299	29	3.7	508,890	78,080	6,470,515
100-199	53	6.7	167,283	26,870	5,577,529
50-99	82	10.4	114,356	6,106	1,721,176
10-49	224	28.5	37,580	320	1,023,142
<10	279	35.5	5,457	37	324,244
Total	**787**	**100.0**	**35,008**	**37**	**70,808,140**

Source: comScore, BFI RSU analysis

Note: Percentages may not sum to 100 due to rounding.

COUNTRY OF ORIGIN OF FILM RELEASES

Twenty-seven per cent of all films released in the UK in 2018 were of USA origin (excluding UK co-productions) and these films accounted for 51% of total box office earnings (Table 7). UK films, including co-productions, represented 25% of releases (up from 21% in 2017) and shared 46% of the box office; UK independent films represented 23% of releases (up from 18% in 2017) and 13% of the box office (up from 10% in 2017), the second highest share since our records began.

Films originating outside the UK and USA accounted for 48% of releases in 2018 (down from 54% in 2017) but just 3% of earnings (down from 5% in 2017). Films from non-UK European countries accounted for 1.1% of the box office (from 19% of releases), down from 1.5% in 2017, while films from India accounted for 1.2% of the total box office (from 20% of releases), up marginally from 1.1% in 2017. The greatest year-on-year fall in theatrical share for non UK or USA titles was for films from the remaining world territories, which accounted for 0.3% of the overall box office (from 9% of releases), compared with 2.3% of the box office in 2017.

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2018

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	212	26.9	668.8	51.3
UK (studio-backed*)	15	1.9	429.8	32.9
UK (independent)	182	23.1	171.8	13.2
All UK	197	25.0	601.6	46.1
Other Europe	152	19.3	14.4	1.1
India	158	20.1	15.6	1.2
Rest of the world	68	8.6	4.4	0.3
Total	**787**	**100.0**	**1,304.8**	**100.0**

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2019.

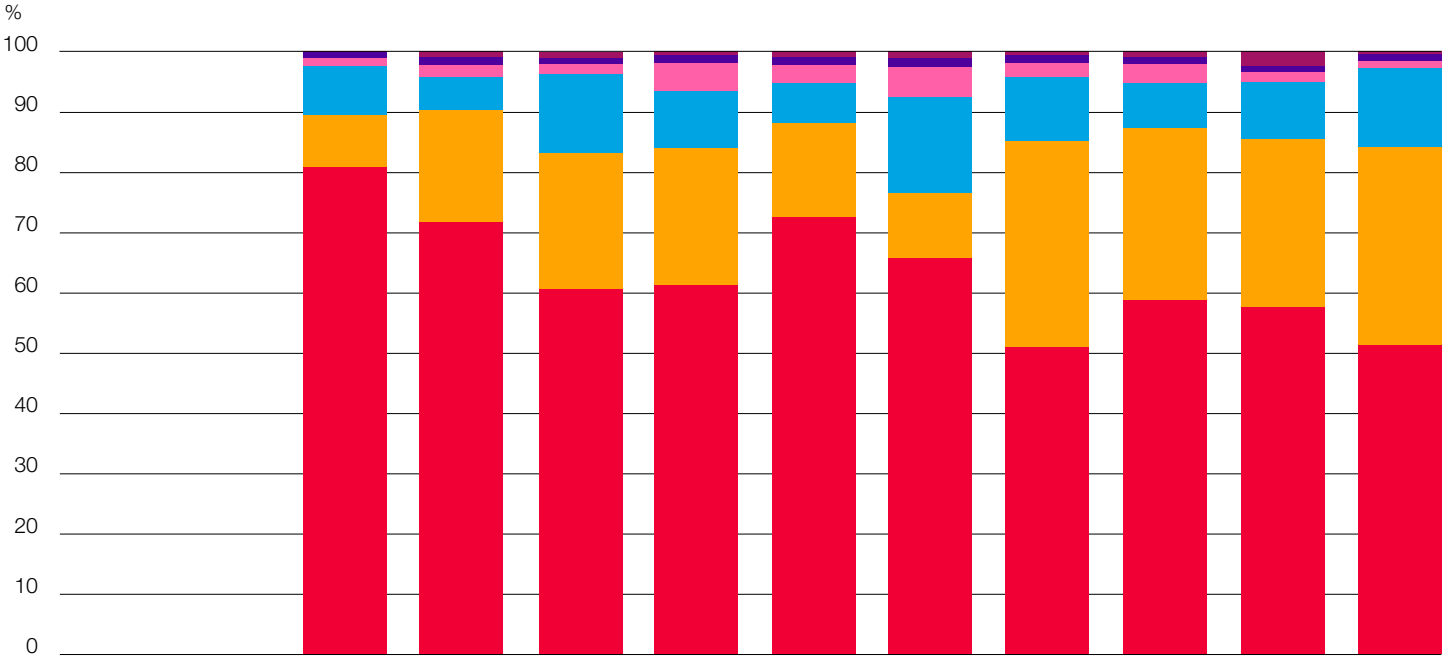
Percentages may not sum to totals/subtotals due to rounding.

* 'Studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Figure 7 shows the breakdown of market share by country of origin for all films released between 2009 and 2018. The most significant trend over the period has been a decline in share for USA-only films which has been compensated by an increase in share for UK studio-backed titles. The average combined share of USA-only and UK studio-backed films was around 90% up to 2010, but fell to around 84% for the remainder of the period, with the exception of 2014 when the aggregate share was 76%. The main reason for the lower figure in that year was the record share achieved by UK independent releases (16%), which included titles such as *Paddington* and *The Inbetweeners 2*, two of 2014's top five grossing films.

The high levels of market share achieved by UK studio-backed films between 2015 and 2018 reflects the number of successful big budget franchise productions making use of the UK's filmmaking infrastructure during those years.

Figure 7 Market share by country of origin, 2009-2018



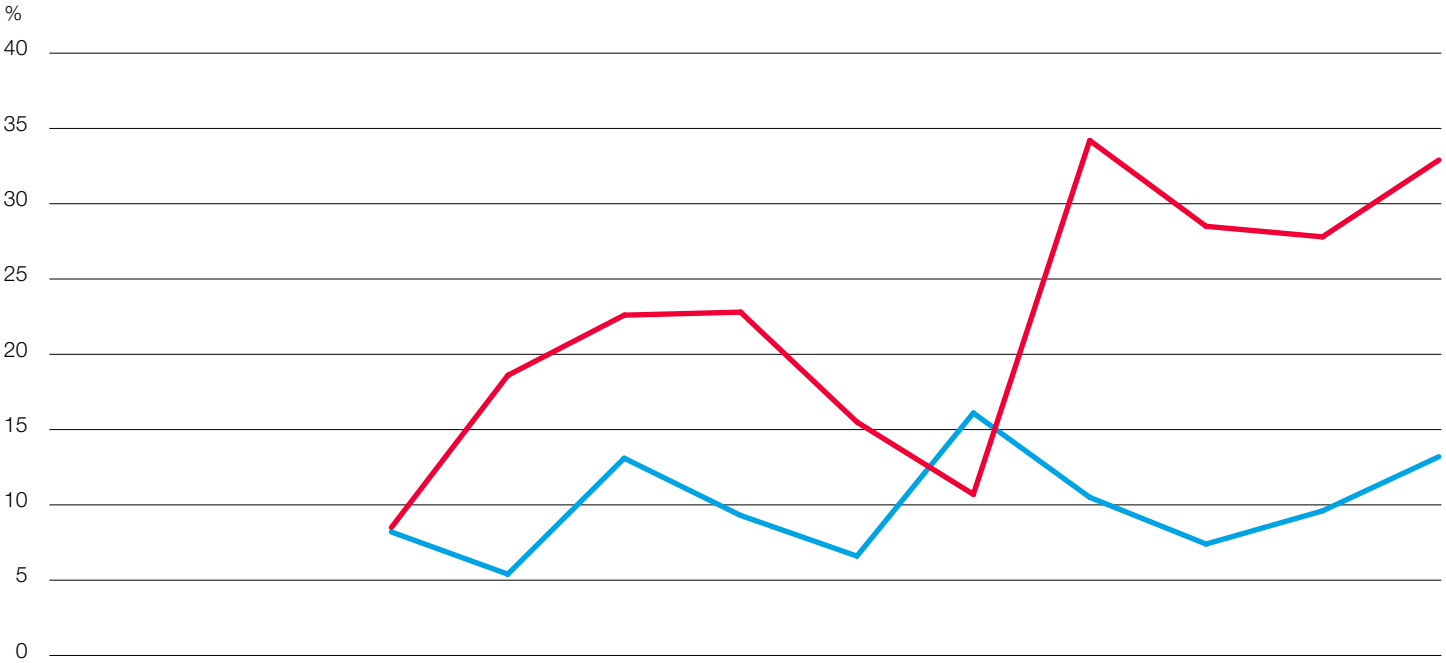
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
USA	81.0	71.8	60.6	61.3	72.7	65.8	51.1	58.9	57.7	51.3
UK studio-backed*	8.5	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9
UK independent	8.2	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2
Other Europe	1.2	2.1	1.7	4.8	3.0	4.9	2.4	3.2	1.5	1.1
India	1.0	1.3	1.0	1.2	1.4	1.5	1.3	1.2	1.1	1.2
Rest of the world	0.2	0.8	1.0	0.6	0.7	1.1	0.5	0.8	2.3	0.3

Source: BFI, RSU

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

The fluctuating pattern of UK market share is underlined in Figure 8 with the annual figure dependent on a small number of high grossing titles. The average UK independent market share for the 10-year period was just under 10% with a slight upward trend from a low of just over 5% in 2010.

Figure 8 UK films' share of the UK theatrical market, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
UK studio-backed*	8.5	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9
UK independent	8.2	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2

Source: BFI, RSU

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Image: *The Guernsey Literary and Potato Peel Pie Society* courtesy of StudioCanal

Table 8 shows the share of UK film releases by box office band over the 10-year period. In 2018, 78% of UK films earned less than £1 million at UK and Republic of Ireland cinemas (the fourth lowest share of the period), while 5% of films earned £20 million or more (the second highest share of the period). One in 10 films released in 2018 earned between £1 million and £5 million while 8% of films earned between £5 million and £20 million, a broadly similar proportion to the rest of the period.

Table 8 UK releases by box office band (£ million), 2009-2018

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
2009	Number	3	-	6	14	21	70	**114**
	%	2.7	-	5.3	12.3	18.4	61.4	**100.0**
2010	Number	3	6	3	10	20	77	**119**
	%	2.5	5.0	2.5	8.4	16.8	64.7	**100.0**
2011	Number	7	4	6	16	24	70	**127**
	%	5.5	3.1	4.7	12.6	18.9	55.1	**100.0**
2012	Number	5	3	7	13	32	102	**162**
	%	3.1	1.9	4.3	8.0	19.8	63.0	**100.0**
2013	Number	4	3	8	14	21	89	**139**
	%	2.8	2.2	5.8	10.1	15.1	64.0	**100.0**
2014	Number	3	3	9	21	28	90	**154**
	%	1.9	1.9	5.8	13.6	18.2	58.4	**100.0**
2015	Number	7	8	7	20	28	139	**209**
	%	3.3	3.8	3.3	9.6	13.4	66.5	**100.0**
2016	Number	6	5	10	17	16	122	**176**
	%	3.4	2.8	5.7	9.7	9.1	69.3	**100.0**
2017	Number	7	6	5	20	28	93	**159**
	%	4.4	3.8	3.1	12.6	17.6	58.5	**100.0**
2018	Number	9	6	9	20	48	105	**197**
	%	4.6	3.0	4.6	10.2	24.4	53.3	**100.0**

Source: comScore, BFI RSU analysis

Note: Percentages may not sum to 100 due to rounding.

TOP FILMS AT THE BOX OFFICE IN 2018

The two highest performing releases at the box office in the UK and Republic of Ireland in 2018 were UK qualifying films (Table 9). *Avengers: Infinity War* topped the chart with earnings of £71 million followed by *Mamma Mia! Here We Go Again* with £66 million. In total, 10 of the top 20 films were UK qualifying productions, nine of which were UK studio-backed projects.

Seventeen films generated grosses of £20 million or over in 2018, three less than in 2017. Sequels and franchise films (including two titles from the Marvel Cinematic Universe series) accounted for 15 of the top 20 films, up from 14 such films in 2017.

Table 9 Box office results for the top 20 films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£ million)	Distributor
1	Avengers: Infinity War	UK/USA	70.8	651	29.7	Walt Disney
2	Mamma Mia! Here We Go Again	UK/USA	65.5	702	9.7	Universal
3	Incredibles 2*	USA	56.2	666	9.6	Walt Disney
4	Bohemian Rhapsody*	UK/USA	53.3	659	9.5	20th Century Fox
5	Black Panther	USA	50.6	585	17.7	Walt Disney
6	Mary Poppins Returns*	UK/USA	43.4	736	8.2	Walt Disney
7	Jurassic World: Fallen Kingdom	UK/USA	41.6	663	14.3	Universal
8	Peter Rabbit	USA/Aus	41.1	599	7.3	Sony
9	Fantastic Beasts: The Crimes of Grindelwald*	UK/USA	34.0	677	12.3	Warner Bros
10	Deadpool 2	USA	32.7	636	13.0	20th Century Fox
11	A Star Is Born	USA	30.0	526	4.1	Warner Bros
12	The Grinch*	USA	27.9	560	5.0	Universal
13	Mission: Impossible - Fallout	UK/USA	24.4	584	7.3	Paramount
14	Darkest Hour	UK/USA#	24.1	605	4.1	Universal
15	Aquaman*	USA	22.5	606	5.2	Warner Bros
16	Venom	UK/USA	20.2	556	8.1	Sony
17	Hotel Transylvania 3: A Monster Vacation	USA	20.1	549	3.5	Sony
18	Solo: A Star Wars Story	UK/USA	19.4	680	6.1	Walt Disney
19	Coco	USA	18.9	575	5.2	Walt Disney
20	Ralph Breaks the Internet*	USA	18.1	613	4.0	Walt Disney

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2019.

* Film still on release on 21 February 2019.

Film made with independent (non-studio) US support or with the independent arm of a US studio.

The top 20 highest earning UK qualifying films of 2018, shown in Table 10, had a combined gross of £508 million, which was 39% of the total UK and Republic of Ireland box office. Fifteen UK films grossed £10 million or over in 2018, two more than in 2017. The top 20 is dominated by UK/USA collaborations, most of which were studio-backed productions. Seven of the titles were UK independent films, two more than in 2017, and they accounted for 17% of the total box office for the top 20 UK films.

Table 10 Box office results for the top 20 UK films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£) million)	Distributor
1	Avengers: Infinity War	UK/USA	70.8	651	29.4	Walt Disney
2	Mamma Mia! Here We Go Again	UK/USA	65.5	702	9.7	Universal
3	Bohemian Rhapsody*	UK/USA	53.3	659	9.5	20th Century Fox
4	Mary Poppins Returns*	UK/USA	43.4	736	8.2	Walt Disney
5	Jurassic World: Fallen Kingdom	UK/USA	41.6	663	14.3	Universal
6	Fantastic Beasts: The Crimes of Grindelwald*	UK/USA	34.0	677	12.3	Warner Bros
7	Mission: Impossible - Fallout	UK/USA	24.4	584	7.3	Paramount
8	Darkest Hour	UK/USA#	24.1	605	4.1	Universal
9	Venom	UK/USA	20.2	556	8.1	Sony
10	Solo: A Star Wars Story	UK/USA	19.4	680	6.1	Walt Disney
11	Johnny English Strikes Again	UK/Fra	17.7	590	4.1	Universal
12	Ready Player One	UK/USA	16.1	621	5.1	Warner Bros
13	Three Billboards Outside Ebbing, Missouri	UK/USA#	15.3	484	2.4	20th Century Fox
14	Christopher Robin	UK/USA	14.9	650	2.6	Walt Disney
15	Early Man	UK/Fra	11.2	551	2.0	StudioCanal
16	Sherlock Gnomes	UK/USA	9.5	572	2.5	Paramount
17	Tomb Raider	UK/USA	7.7	585	3.1	Warner Bros
18	Widows	UK/USA#	6.4	570	2.4	20th Century Fox
19	Red Sparrow	UK/USA/Hun#	6.4	530	1.9	20th Century Fox
20	King of Thieves	UK/Fra	6.1	494	1.5	StudioCanal

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2019.

* Film still on release on 21 February 2019.

Film made with independent (non-studio) US support or with the independent arm of a US studio.

Image: *Darkest Hour* ©2017 Focus Features LLC. All Rights Reserved. Courtesy of Universal Studios Licensing LLC

Table 11 shows an extended box office chart detailing the top 30 highest grossing UK independent film releases of 2018. *Darkest Hour* was the year's top earner with a gross of £24 million, followed by *Johnny English Strikes Again* (£18 million) and *Three Billboards Outside Ebbing, Missouri* (£15 million). The list includes a number of independent productions which qualify as British under the cultural test for film but which were financed and produced by non-UK production entities. (Titles in this category include *Red Sparrow, Isle of Dogs* and *The Commuter*.)

The table features one documentary release: Peter Jackson's homage to the British troops of the First World War, *They Shall Not Grow Old*, is in 30th place with earnings of £0.9 million, which were boosted by premiere screenings with Q&As to tie in directly with the 100th anniversary of the end of the conflict.

The combined box office for the top 20 films in the list accounted for 77% of the total box office for all independent UK films released in 2018. This is down from 2017, when the top 20 films generated 86% of the overall gross for these films.

Table 11 Box office results for the top 30 UK independent films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£ million)	Distributor
1	Darkest Hour	UK/USA#	24.1	605	4.1	Universal
2	Johnny English Strikes Again*	UK/Fra	17.7	590	4.1	Universal
3	Three Billboards Outside Ebbing, Missouri	UK/USA#	15.3	484	2.4	20th Century Fox
4	Early Man	UK/Fra	11.2	551	2.0	StudioCanal
5	Widows	UK/USA#	6.4	570	2.4	20th Century Fox
6	Red Sparrow	UK/USA/Hun#	6.4	530	1.9	20th Century Fox
7	King of Thieves	UK/Fra	6.1	494	1.5	StudioCanal
8	Isle of Dogs	UK/Ger/USA#	6.0	472	1.6	20th Century Fox
9	The Guernsey Literary and Potato Peel Pie Society	UK/Fra/USA#	5.9	499	0.8	StudioCanal
10	Finding Your Feet	UK	5.9	489	0.9	eOne films
11	The Commuter	UK/Fr/USA#	4.0	472	1.6	StudioCanal
12	Show Dogs	UK/USA#	3.5	511	0.5	eOne films
13	The Festival	UK	3.4	408	1.4	Entertainment
14	Nativity Rocks!	UK	3.1	467	0.8	eOne films
15	The Children Act*	UK/USA#	2.9	148	0.5	eOne films
16	Robin Hood	UK/USA/HK/Hun#	2.8	473	1.3	Lionsgate
17	Phantom Thread	UK/USA#	2.8	196	0.7	Universal
18	The Wife	UK/Swe/USA#	1.7	119	0.4	Picturehouse
19	Ghost Stories	UK	1.6	397	0.6	Lionsgate
20	Adrift	UK/USA/HK/Ice#	1.5	464	0.4	STX Entertainment
21	Overlord	UK/USA#	1.3	421	0.7	Paramount
22	Peterloo*	UK	1.3	138	0.4	eOne films
23	Patrick	UK/USA#	1.2	509	0.3	Walt Disney
24	Yardie	UK	1.1	225	0.4	StudioCanal
25	Cold War*	UK/Pol/Fra	1.1	61	0.2	Curzon
26	You Were Never Really Here	UK/Fra/USA#	1.0	77	0.3	StudioCanal
27	On Chesil Beach	UK	1.0	30	0.1	Lionsgate
28	The Mercy	UK/Fra	0.9	254	0.3	20th Century Fox
29	Journey's End	UK	0.9	95	0.1	Lionsgate
30	They Shall Not Grow Old*	UK/NZ	0.9	383	0.3	Trafalgar

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2019.

* Film still on release on 21 February 2019.

Film made with independent (non-studio) US support or with the independent arm of a US studio.

THE TOP 3D FILMS

Thirty-nine 3D films were released in 2018, generating £43 million (to 21 February 2019) from their 3D screenings. However, while the number of releases was a slight increase on the 37 seen in 2017, revenues from 3D screenings were less than half the total achieved in the previous year (£88 million). The combined gross from 3D screenings in 2018 accounted for 3% of total box office receipts compared with 6% in 2017. All of the 39 3D films were released in both the 3D and 2D formats. (Data for 3D IMAX screenings are not disaggregated from 3D totals in the current analysis.)

The top 10 3D releases in 2018 are listed in Table 12. *Avengers: Infinity War* had the highest 3D takings (£9 million) while, the Tamil language sci-fi film *2.0* (which does not appear in the top 10) generated the highest proportion of total gross from 3D screenings (50%). Excluding *2.0*, the median 3D takings for these films as a percentage of total gross was 8%, down considerably from 18% in 2017.

The popularity of 3D films has been on a downward trend from a high point in 2010, when the overall box office gross generated by 3D screenings was £242 million (24% of the total box office) and the median share for 3D screenings as a percentage of total gross for films released in both formats was 71%.

Table 12 Top 10 3D releases in the UK and Republic of Ireland, 2018 (ranked by 3D gross)

	Title	Total gross (£ million)	3D gross (£ million)	3D % of total	Number of 3D sites	Distributor
1	Avengers: Infinity War	70.7	8.9	12.6	454	Walt Disney
2	Jurassic World: Fallen Kingdom	41.5	5.8	13.9	441	Universal
3	Black Panther	50.5	4.0	8.0	372	Walt Disney
4	Fantastic Beasts: The Crimes of Grindelwald*	34.0	2.9	8.6	413	Warner Bros
5	Ready Player One	16.1	2.4	15.0	452	Warner Bros
6	The Meg	15.9	2.3	14.3	255	Warner Bros
7	Incredibles 2*	56.2	2.0	3.6	379	Walt Disney
8	Aquaman*	22.5	1.6	6.9	246	Warner Bros
9	Venom	20.1	1.6	7.7	279	Sony
10	Solo: A Star Wars Story	19.4	1.5	7.7	412	Walt Disney

Source: comScore

Notes:

Box office gross = cumulative total up to 21 February 2019.

* Film still on release on 21 February 2019.

The 3D grosses include takings from IMAX screenings.

BEST WEEKEND PERFORMANCE OF UK FILMS

A total of 30 different films topped the UK weekend box office charts over the course of 2018. Eleven of these were UK titles, which spent a combined total of 22 weeks at number one (Table 13). The table includes theatrical grosses generated over the three-day weekend plus revenues from any previews. In 2017, 13 UK films achieved the number one slot in the weekend charts for a total of 25 weeks.

Three UK qualifying films topped the chart for three weeks in 2018 – *Avengers: Infinity War, Jurassic World: Fallen Kingdom* and *Mary Poppins Returns*. *Avengers: Infinity War* had the biggest opening of the year and the best opening ever for a superhero film in the UK with takings of £23.1 million from the three-day weekend and £29.4 million including previews. Without the inclusion of previews, three of the films in the list would each have topped the weekend charts for one week more than shown in the table: *Mamma Mia! Here We Go Again, Christopher Robin* and *Jurassic World: Forbidden Kingdom*. Interestingly, although *Mamma Mia! Here We Go Again* only achieved the top spot on its first week of release, it remained the second highest grossing film at the UK box office for the next six consecutive weeks, the longest run in this position for any title released during the year.

Darkest Hour was the only independent UK film to top the weekend charts in the year (it held the spot for two weeks). In 2017, *Paddington 2* was the only independent UK title to hold the number one spot, but it did so for three weeks.

Table 13 UK films at number one in the weekend box office charts, 2018

Title	First week at top	Opening weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
Avengers: Infinity War	27/04/2018	29.4	70.8	Walt Disney	3
Jurassic World: Fallen Kingdom	08/06/2018	14.3	41.6	Universal	3
Mary Poppins Returns*	21/12/2018	8.2	43.4	Walt Disney	3
Darkest Hour	12/01/2018	4.1	24.1	Universal	2
Solo: A Star Wars Story	25/05/2018	6.1	19.4	Walt Disney	2
Christopher Robin	17/08/2018	2.6	14.9	Walt Disney	2
Bohemian Rhapsody*	26/10/2018	9.5	53.3	20th Century Fox	2
Fantastic Beasts: The Crimes of Grindelwald*	16/11/2018	12.3	34.0	Warner Bros	2
Mamma Mia! Here We Go Again	20/07/2018	9.7	65.5	Universal	1
Venom	05/10/2018	8.0	19.4	Sony	1
Mission: Impossible - Fallout	27/07/2018	7.3	24.4	Paramount	1

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 21 February 2019.

Opening weekend gross includes revenues from previews.

* Film still on release on 21 February 2019.

TOP 20 FILMS AT THE UK BOX OFFICE, 1975-2018

Table 14 shows an inflation-adjusted box office chart based on the top 20 highest grossing films released in the UK since 1975 (when coverage of leading titles began). The 2015 release *Star Wars: The Force Awakens* tops the chart, with an inflation-adjusted box office gross of £131 million. Three other films from the Star Wars franchise feature in the top 20: 2017's *Star Wars: The Last Jedi* (£85 million) is in eighth place, 1999's *Star Wars Episode I: The Phantom Menace* (£82 million) is in 13th place, and 1977's now re-titled *Star Wars: A New Hope* (£77 million) is in 18th place.

The inflation-adjusted top 20 is dominated by franchise films. In addition to the four Star Wars titles, it includes three Harry Potter films, the Lord of the Rings trilogy and two James Bond films. The only top 20 films released since 1975 which are neither part of a series or franchise are *Titanic* and *The Full Monty*. (Since publication of the 2018 Statistical Yearbook principal photography has begun on two of the planned four sequels to *Avatar*.)

Ten of the top 20 films are UK/USA collaborations, and the same number are based on stories and characters created by UK writers, such as the authors Ian Fleming and JK Rowling and the playwright Catherine Johnson, which shows the sustained appetite for home-grown material amongst British audiences. There are no 2018 releases in the top 20; the highest grossing film of the year, *Avengers: Infinity War*, is ranked at number 21 in the overall inflation-adjusted list.

Table 14 Top 20 highest grossing films at the UK box office, 1975-2018 (inflation adjusted[1])

	Title	Country of origin	Box office gross (£ million)	Distributor	Year of release
1	Star Wars: The Force Awakens	UK/USA	130.8	Walt Disney	2015
2	Titanic	USA	117.3	20th Century Fox	1998/2012/2017
3	Skyfall	UK/USA	114.0	Sony	2012
4	Avatar	USA	109.1	20th Century Fox	2009
5	SPECTRE	UK/USA	101.0	Sony	2015
6	Harry Potter and the Philosopher's Stone	UK/USA	92.4	Warner Bros	2001
7	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	88.7	Entertainment	2001
8	Star Wars: The Last Jedi	UK/USA	84.7	Walt Disney	2017
9	Toy Story 3	USA	84.1	Walt Disney	2010
10	Jaws	USA	83.3	UIP	1975
11	The Lord of the Rings: The Return of the King	USA/NZ	82.2	Entertainment	2003
12	Harry Potter and the Deathly Hallows: Part 2	UK/USA	82.0	Warner Bros	2011
13	Star Wars Episode I: The Phantom Menace	USA	81.7	20th Century Fox	1999/2012
14	Mamma Mia!	UK/USA	80.9	Universal	2008
15	The Lord of the Rings: The Two Towers	USA/NZ	79.4	Entertainment	2002
16	Jurassic Park	USA	78.4	UIP	1993/2013
17	The Full Monty	UK/USA	77.1	20th Century Fox	1997
18	Star Wars: A New Hope	USA	77.0	20th Century Fox	1977
19	Harry Potter and the Chamber of Secrets	UK/USA	75.5	Warner Bros	2002
20	Beauty and the Beast	UK/USA	73.7	Walt Disney	2017

Source: comScore, BFI RSU analysis

Notes:

[1] The 2018 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2018-quarterly-national-accounts.

The box office grosses for *Titanic*, *Star Wars Episode I: The Phantom Menace* and *Jurassic Park* include the grosses from their original releases, plus revenues from their subsequent 3D or anniversary re-releases.

Box office gross = cumulative total up to 21 February 2019.

Table 15 shows an inflation-adjusted top 20 box office chart for the highest grossing UK qualifying films released in the UK since 1975. The list is comprised solely of US studio-backed features. *Star Wars: The Force Awakens*, which tops the chart with an inflation-adjusted gross of £131 million, is one of three recent Star Wars titles in the list. All four of the James Bond films to star Daniel Craig feature in the list, the top ranked of which is 2012's *Skyfall* (£114 million) which is in second place. The list is dominated, however, by the Harry Potter franchise, with seven of the eight films appearing in the top 20. The first film in the series, *Harry Potter and the Philosopher's Stone* (£92 million), is ranked highest at number four. The oldest film in the list is *The Full Monty* (1997) which appears at number eight with an inflation-adjusted gross of £77 million.

Two films released in 2018 appear in the chart. *Avengers: Infinity War* (£71 million), the first film from the Marvel Cinematic Universe series to make the UK top 20, is at number 11, and the ABBA musical sequel *Mamma Mia! Here We Go Again* (£65.5 million) is in 14th place.

Table 15 Top 20 UK qualifying films at the UK box office, 1975-2018 (inflation adjusted[1])

	Title	Country of origin	UK box office total (2018 £ million)	Distributor	Year of release
1	Star Wars: The Force Awakens	UK/USA	130.8	Walt Disney	2015
2	Skyfall	UK/USA	114.0	Sony	2012
3	SPECTRE	UK/USA	101.0	Sony	2015
4	Harry Potter and the Philosopher's Stone	UK/USA	92.4	Warner Bros	2001
5	Star Wars: The Last Jedi	UK/USA	84.7	Walt Disney	2017
6	Harry Potter and the Deathly Hallows: Part 2	UK/USA	82.0	Warner Bros	2011
7	Mamma Mia!	UK/USA	80.9	Universal	2008
8	The Full Monty	UK/USA	77.1	20th Century Fox	1997
9	Harry Potter and the Chamber of Secrets	UK/USA	75.5	Warner Bros	2002
10	Beauty and the Beast	UK/USA	73.7	Walt Disney	2017
11	Avengers: Infinity War	UK/USA	70.8	Walt Disney	2018
12	Casino Royale	UK/USA/Cze	69.2	Sony	2006
13	Rogue One: A Star Wars Story	UK/USA	68.6	Walt Disney	2016
14	Mamma Mia! Here We Go Again	UK/USA	65.5	Universal	2018
15	Harry Potter and the Goblet of Fire	UK/USA	63.0	Warner Bros	2005
16	The Dark Knight Rises	UK/USA	62.1	Warner Bros	2012
17	Harry Potter and the Prisoner of Azkaban	UK/USA	60.5	Warner Bros	2004
18	Harry Potter and the Order of the Phoenix	UK/USA	60.5	Warner Bros	2007
19	Quantum of Solace	UK/USA	60.4	Sony	2008
20	Harry Potter and the Deathly Hallows: Part 1	UK/USA	60.0	Warner Bros	2010

Source: comScore, BFI RSU analysis

Notes:

[1] The 2018 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2018-quarterly-national-accounts.

Box office gross = cumulative total up to 21 February 2019.

Table 16 shows an inflation-adjusted box office chart based on the top 20 highest grossing independent UK films released at the UK box office since 1975. *The King's Speech* and *The Inbetweeners Movie*, both of which were released in 2011, top the list with inflation-adjusted grosses of £51 million and £50.5 million respectively. *Four Weddings and a Funeral* (1994) is in third place with £44 million. The two films in the Paddington series round out the top five with 2017's *Paddington 2* in fourth place with £43 million, and the original *Paddington* (2014) in fifth place with £40 million. The oldest film in the list is the 1979 release *Monty Python's Life of Brian* which is in 10th place with £24 million.

There are two 2018 releases in the list: *Darkest Hour* appears in ninth place with £24 million and *Johnny English Strikes again* is 18th with £18 million.

Table 16 Top 20 highest grossing UK independent films at the UK box office, 1975-2018 (inflation adjusted[1])

	Title	Country of origin	UK box office total (2018 £ million)	Distributor	Year of release
1	The King's Speech	UK	51.3	Momentum/Alliance	2011
2	The Inbetweeners Movie	UK	50.5	Entertainment	2011
3	Four Weddings and a Funeral	UK	44.0	Carlton	1994
4	Paddington 2*	UK/Fra	43.4	StudioCanal	2017
5	Paddington	UK/Fra	40.4	StudioCanal	2014
6	Slumdog Millionaire	UK	36.8	Pathé	2009
7	The Inbetweeners 2	UK	35.6	Entertainment	2014
8	A Fish Called Wanda	UK/USA#	25.4	UIP	1988
9	Darkest Hour	UK/USA#	24.1	Universal	2018
10	Monty Python's Life of Brian	UK	24.0	UIP	1979
11	The Woman in Black	UK/USA#	23.6	Momentum/Alliance	2012
12	Shirley Valentine	UK	22.6	UIP	1989
13	The Best Exotic Marigold Hotel	UK/USA/Ind#	22.6	20th Century Fox	2012
14	Gandhi	UK/Ind	22.1	Sony	1982
15	Flash Gordon	UK	21.8	EMI	1980
16	Legend	UK/Fra/USA#	19.5	StudioCanal	2015
17	Trainspotting	UK	18.4	Rank/PolyGram	1996
18	Johnny English Strikes Again	UK/Fra	17.7	StudioCanal	2018
19	The Imitation Game	UK/USA#	17.5	StudioCanal	2014
20	T2 Trainspotting	UK/USA#	17.4	Sony	2017

Source: comScore, BFI RSU analysis

Notes:

[1] The 2018 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2018-quarterly-national-accounts.

Film made with independent (non-studio) US support or with the independent arm of a US studio.

Box office gross = cumulative total up to 21 February 2019.

Genre in the Statistical Yearbook

For statistical purposes, the BFI Research and Statistics Unit assigns a primary genre to every film released in the UK. This is not meant to be prescriptive but helps gauge the relative popularity of different genres on a consistent basis from year to year. The list of genres is based on conventions commonly used within the industry and by published sources such as the BFI's Collections Information Database, the British Board of Film Classification (BBFC), the Internet Movie Database (IMDb) and distributors' websites.

Image: *Widows* courtesy of Twentieth Century Fox Film Corporation, Monarchy Enterprises S.a.r.l.and Regency Entertainment (USA), Inc. All rights reserved.

RELEASES AND BOX OFFICE BY GENRE

Table 17 shows the relative popularity of different genres at the box office in the UK and Republic of Ireland in 2018. The pattern of box office by genre each year is usually determined by a small number of high grossing releases. For the fourth consecutive year, action was the top earning genre with a combined gross of £369 million, followed by animation with £242 million and drama with £154 million. It is unusual for drama to feature in the top three earning genres although it typically represents the highest proportion of releases. In 2018, almost one third of releases (31%) were dramas and these films generated 12% of the overall box office. *A Star Is Born* and *Darkest Hour*, the year's two highest grossing drama releases (out of a total of 246 titles), generated 36% of the overall box office for this genre.

Twelve of the top performing titles by genre were UK qualifying films, which highlights the variety of story types which underpin British film success. In addition to the top film of the year, *Avengers: Infinity War*, these were *Johnny English Strikes Again, Bohemian Rhapsody, Mamma Mia! Here We Go Again, Mary Poppins Returns, Fantastic Beasts: The Crimes of Grindelwald, Ready Player One, Solo: A Star Wars Story, Widows, The Guernsey Literary and Potato Peel Pie Society, Journey's End* and *Dark River.*

Table 17 Films released in the UK and Republic of Ireland by genre, 2018 (ranked by gross box office)

Genre	Number of releases	% of releases	Gross box office (£ million)	% of total box office	Top performing title
Action	77	9.8	361.3	27.7	Avengers: Infinity War
Animation	46	5.8	242.2	18.6	Incredibles 2
Drama	246	31.3	154.1	11.8	A Star Is Born
Comedy	144	18.3	88.3	6.8	Johnny English Strikes Again
Biopic	5	0.6	78.5	6.0	Bohemian Rhapsody
Musical	5	0.6	67.0	5.1	Mamma Mia! Here We Go Again
Family	10	1.3	60.3	4.6	Mary Poppins Returns
Fantasy	4	0.5	57.6	4.4	Fantastic Beasts: The Crimes of Grindelwald
Horror	38	4.8	57.1	4.4	A Quiet Place
Adventure	10	1.3	36.4	2.8	Ready Player One
Sci-fi	14	1.8	30.8	2.4	Solo: A Star Wars Story
Thriller	42	5.3	30.6	2.3	The Equalizer 2
Crime	10	1.3	17.9	1.4	Widows
Romance	17	2.2	11.8	0.9	The Guernsey Literary and Potato Peel Pie Society
Documentary	112	14.2	9.3	0.7	Free Solo
War	3	0.4	1.3	0.1	Journey's End
Western	2	0.3	0.1	<0.1	Sweet Country
Mystery	2	0.3	0.1	<0.1	Dark River
Total	**787**	**100.0**	**1,304.8**	**100.0**	

Source: comScore, BFI RSU analysis

Note: Figures/percentages may not sum to totals due to rounding.

The pattern of genres ranked by the average number of sites at the widest point of release (WPR) is shown in Table 18. The top three genres by average WPR in 2018 were fantasy, biopic and musical. The averages are skewed, however, by the low number of releases in these categories, and the inclusion of studio-backed titles which are typically released into more cinemas than other films. The titles with the highest individual WPRs in each of these genres were also the top earning films in their categories: *Fantastic Beasts: The Crimes of Grindelwald* (WPR of 685), *Bohemian Rhapsody* (WPR of 659) and *Mamma Mia! Here We Go Again* (WPR of 703).

The title released into the greatest number of cinemas in 2018 was the family film *Mary Poppins Returns* which was shown at 742 sites at its widest point of release. This is the widest ever release in the UK and beats the previous record set by *Star Wars: The Last Jedi* (723) in 2017.

Table 18 Films released in the UK and Republic of Ireland by genre, 2018 (ranked by average widest point of release)

Genre	Number of releases	Box office (£ million)	Average number of sites at widest point of release	Average number of weeks on release
Fantasy	4	57.6	559	21
Biopic	5	78.5	356	20
Musical	5	67.0	314	22
Adventure	10	36.4	310	13
Family	10	60.3	255	11
Animation	46	242.2	235	17
Crime	10	17.9	204	12
Sci-fi	14	30.8	193	8
Action	77	361.3	187	8
Horror	38	57.1	164	8
Thriller	42	30.6	116	10
Comedy	144	88.3	101	8
Romance	17	11.8	80	9
War	3	1.3	67	18
Drama	246	154.1	57	10
Documentary	112	9.3	28	10
Western	2	0.1	23	17
Mystery	2	0.1	15	15
Total	**787**	**1,304.8**	**109**	**10**

Source: comScore, BFI RSU analysis

Note: The widest point of release (WPR) is different to the number of locations at opening weekend, as some films may expand to more locations after opening. There may be differences between the figures in this table and the accompanying text and the data in Table 10.

BBFC classification

All films in the UK must carry a classification indicating their suitability for exhibition in premises licensed for cinematic exhibition by local authorities. The British Board of Film Classification (BBFC) provides age ratings for the majority of films aimed at theatrical release, although local authorities may grant their own classification if they decide to do so.

The symbols used by the BBFC, and their meanings, are given below.

U (Universal)	Suitable for all
PG (Parental Guidance)	General viewing, but some scenes may be unsuitable for young children
12A	No-one younger than 12 may see a '12A' film in a cinema unless accompanied by an adult
15	No-one younger than 15 may see a '15' film in a cinema
18	No-one younger than 18 may see an '18' film in a cinema

RELEASES AND BOX OFFICE BY CLASSIFICATION

Table 19 shows a breakdown of 2018 releases by BBFC film classification. It shows that, as in previous years, more '15' films (42%) were released than any other category, but the largest share of box office gross was earned by '12A' films (41%). The proportion of '15' films released (42%) was higher than in 2017 (39%) but was lower for '12A' films (34% compared with 36%). Films classified as '15' typically account for the second highest share of box office gross but in 2018 the 'PG' classification was the second highest earning rating. Films with a 'PG' rating accounted for 25% of the overall box office gross in 2018 (up from 14% in 2017), while '15' rated films earned 22% of the total gross, the same share as in 2017.

Table 19 All releases in the UK and Republic of Ireland by BBFC film classification, 2018

	Number of releases	% of all UK releases	Gross box office (£ million)	% of gross box office	Top performing title
U	44	5.6	122.0	9.4	Mary Poppins Returns
PG	102	13.0	329.4	25.2	Mamma Mia! Here We Go Again
12A	264	33.5	531.2	40.7	Avengers: Infinity War
15	329	41.8	288.3	22.1	Deadpool 2
18	41	5.2	33.9	2.6	Fifty Shades Freed
No classification	7	0.9	<0.1	<0.1	Being Blacker
Total	**787**	**100**	**1,304.8**	**100.0**	

Source: comScore, BBFC, BFI RSU analysis

Note: Figures as at 21 February 2019.

Figures 9 and 10 show a comparison of the share of releases and gross box office by BBFC classification for all films, UK films and UK independent films in 2018. The rankings in terms of release share by classification are the same across all three categories of film type, with titles with a '15' classification accounting for the highest proportion of releases, followed by '12A' and 'PG'. However, there were differences in the proportion of box office takings by classification between the three categories.

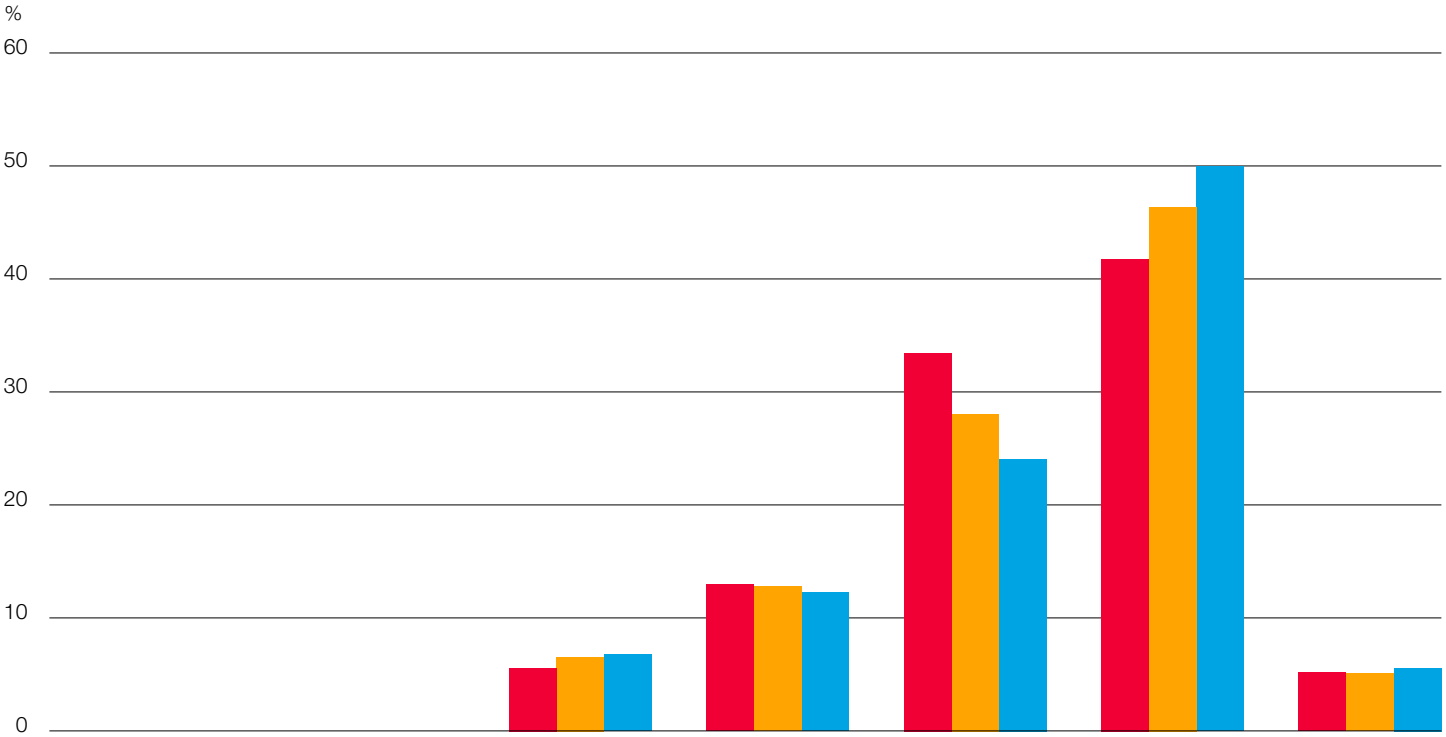
For all films and UK films the highest earning classification was '12A' followed by 'PG', whereas for UK independent films the highest earning classification was 'PG' followed by '15'. Films with a '12A' classification generated 41% of the total box office for all films and 51% of the total box office for UK films, compared to 18% for UK independent films. Eight of the 20 highest earning films in 2018 were '12A' titles, including the top grossing film of the year, *Avengers: Infinity War*. (The top earning UK independent film with a '12A' rating was *The Guernsey Literary and Potato Peel Pie Society* which ranked at 53 in the overall box office chart.)

UK independent films earned a larger proportion of their overall box office from the 'PG' and '15' classifications than the other two categories in 2018. Forty-two per cent of the total box office for UK independent films was generated by 'PG' films, compared to 25% for all films and UK films, while 37% of this category's total box office was generated by '15' films, compared with 22% for all films and 14% for UK films. The top earning independent UK titles in each of these classifications shows how the pattern of box office by rating each year is usually determined by a small number of high grossing releases. The combined grosses of *Darkest Hour, Johnny English Strikes Again* and *Early Man* made up almost 95% of the total box office for 'PG' rated independent UK films, while the top grossing '15' rated independent UK film, *Three Billboards Outside Ebbing, Missouri,* earned nearly one third of the total box office for independent UK titles in this classification.

Unusually, films with a 'U' classification generated a larger share of total box office for both UK films and UK independent films compared with all films. This is a change to the trend in recent years and is due to the success of *Mary Poppins Returns* which made 75% of the total box office for 'U' rated UK films and *Nativity Rocks!* which earned 67% of the total box office for 'U' rated UK independent films. (The share for 'U' rated titles in the all films category is generally boosted by a number of high earning animated titles produced by the US majors.)

Image: *Mary Poppins Returns* ©2018 Disney Enterprises, Inc. All Rights Reserved.

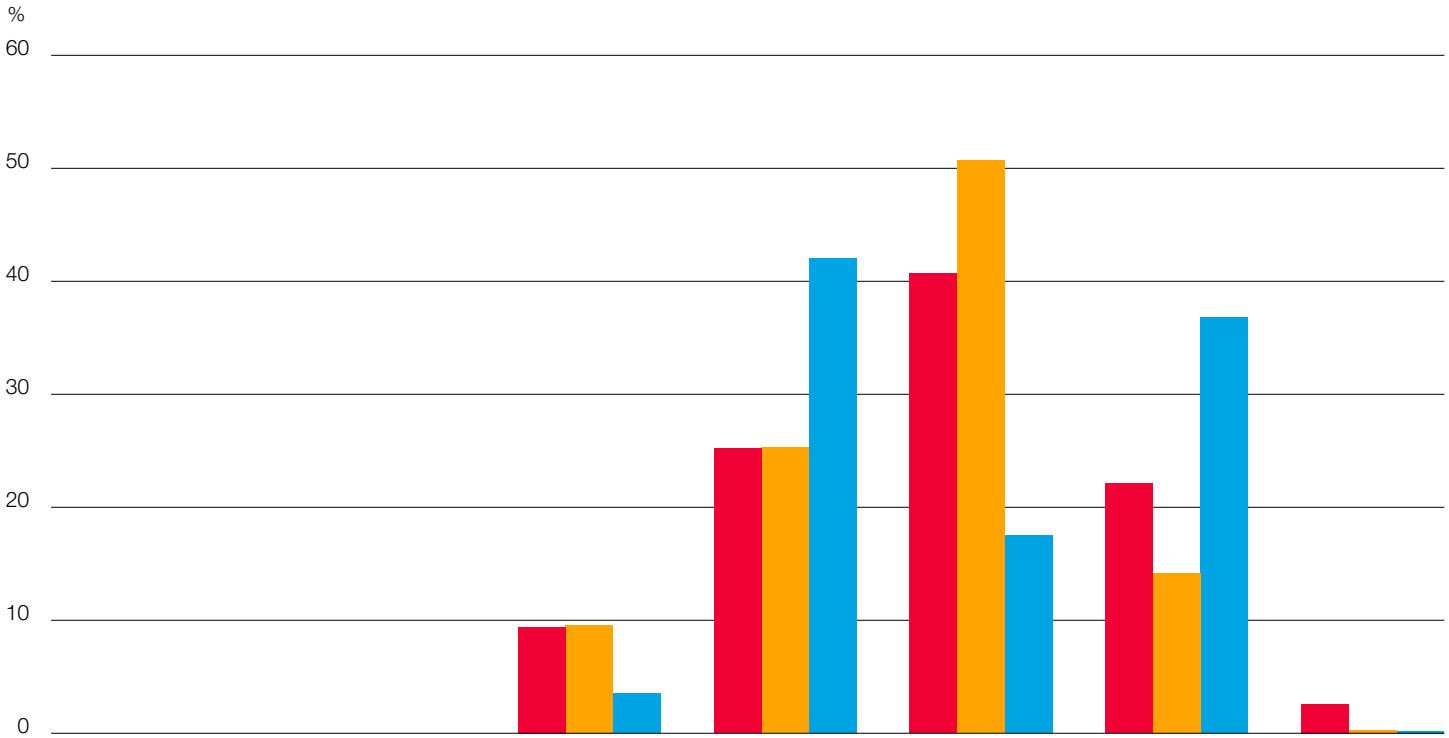
Figure 9 Percentage of releases by BBFC film classification for all films, UK films and UK independent films, 2018



	U	PG	12A	15	18
All film	5.6	13.0	33.5	41.8	5.2
UK film	6.6	12.8	28.1	46.4	5.1
UK independent film	6.8	12.3	24.1	50.0	5.6

Source: comScore, BBFC, BFI RSU analysis
Note: Figures as at 21 February 2019.

Figure 10 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2018



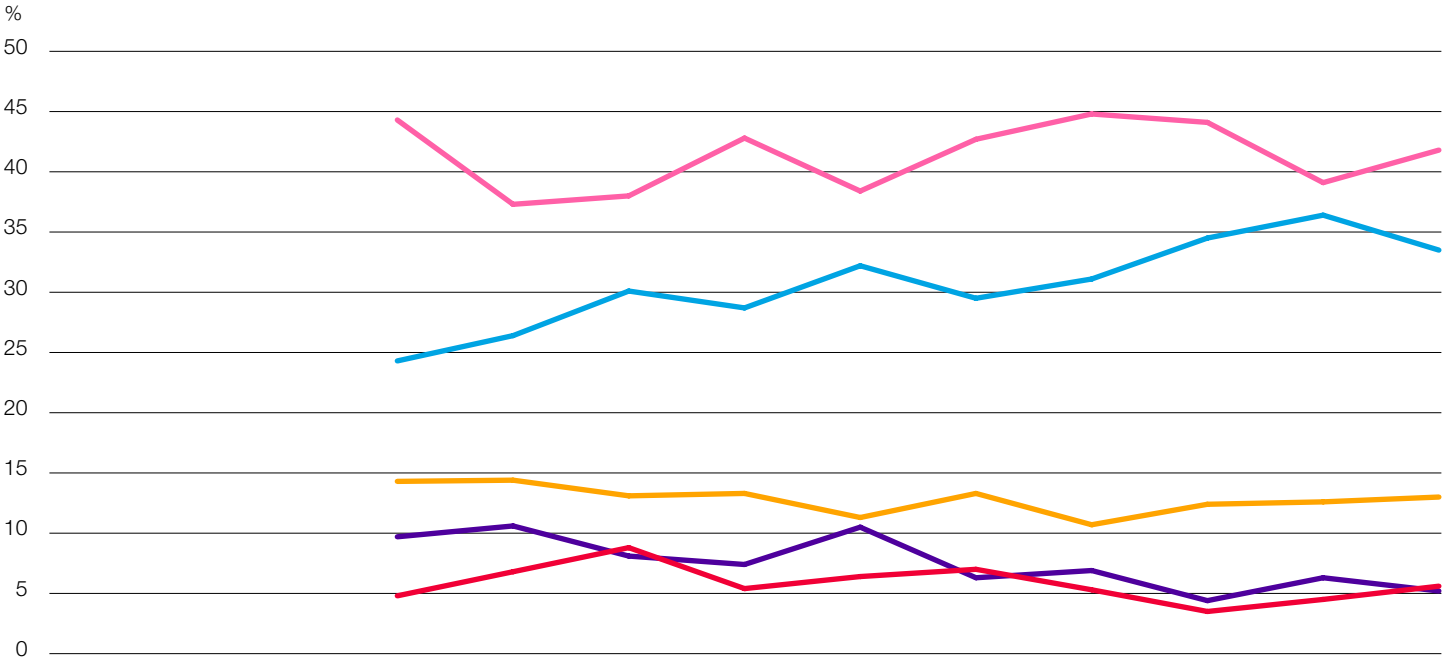
	U	PG	12A	15	18
All film	9.4	25.2	40.7	22.1	2.6
UK film	9.6	25.3	50.7	14.2	0.3
UK independent film	3.5	42.0	17.5	36.8	0.2

Source: comScore, BBFC, BFI RSU analysis

Note: Figures as at 21 February 2019.

Figure 11 looks at the pattern of releases by classification between 2009 and 2018. Throughout the period, the share of releases for the most common classification, '15', has mainly been around 40%, but was as high as 45% in 2015. The second and third most common classifications '12A' and 'PG' have together generally accounted for between 40%-45% of releases since 2009, but was as high as 49% in 2017. The 'U' and '18' classifications have consistently accounted for the smallest percentages of releases over the period. In 2011, 2014 and 2018, there were slightly more 'U' films released than '18' films, but in all other years, more '18' films than 'U' films were released.

Figure 11 Percentage of releases in the UK and Republic of Ireland by film classification, 2009-2018

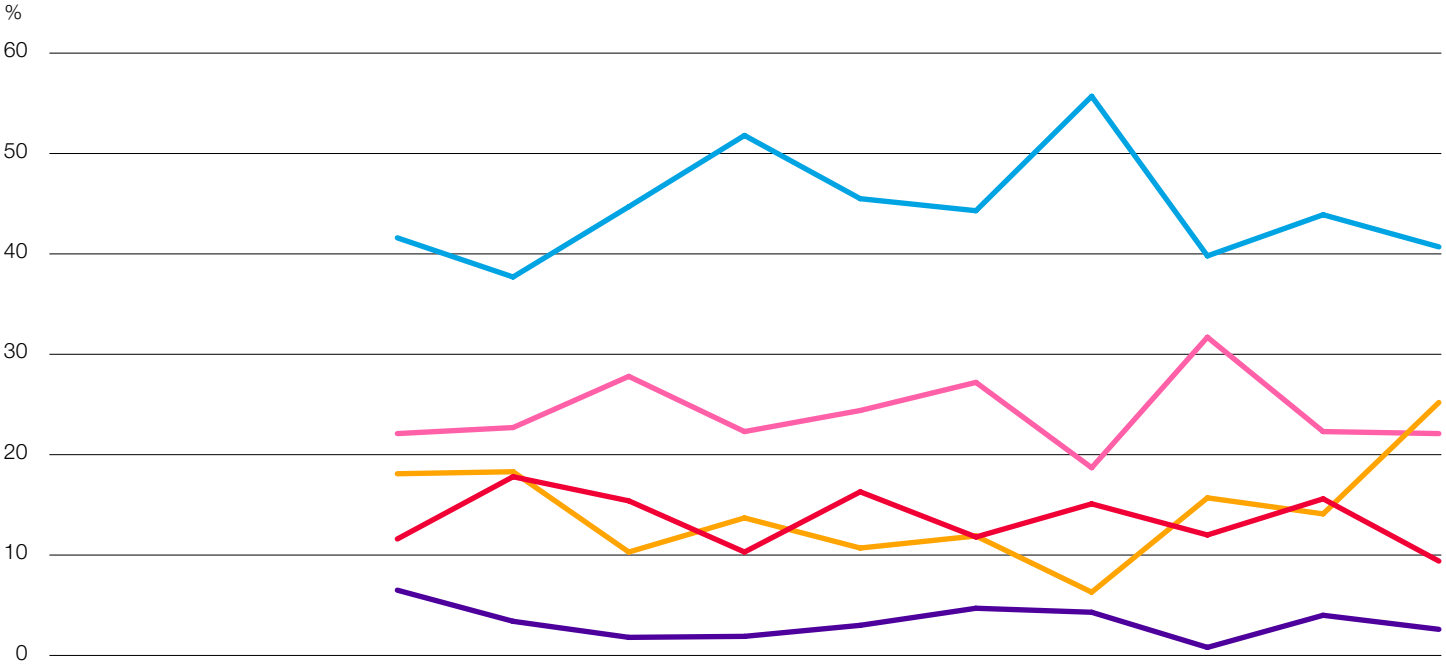


	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
U	4.8	6.8	8.8	5.4	6.4	7.0	5.3	3.5	4.5	5.6
PG	14.3	14.4	13.1	13.3	11.3	13.3	10.7	12.4	12.6	13.0
12A	24.3	26.4	30.1	28.7	32.2	29.5	31.1	34.5	36.4	33.5
15	44.3	37.3	38.0	42.8	38.4	42.7	44.8	44.1	39.1	41.8
18	9.7	10.6	8.1	7.4	10.5	6.3	6.9	4.4	6.3	5.2

Source: comScore, BBFC, BFI RSU analysis
Note: Figures as at 21 February 2019.

The shares of box office by film classification vary from year to year as demonstrated in Figure 12. However, the box office ranking of the classifications has remained fairly constant over time; the top earner being '12A', with '18' the lowest earner. With the exception of 2018, the '15' classification has been the second highest earning rating (although in the previous 10-year period it had been in competition with the 'PG' rating for this position). The greater box office share for the 'PG' classification in 2018 is primarily due to the performance of *Mamma Mia! Here We Go Again* and *Incredibles 2* which were respectively the year's second and third highest earning releases. For the majority of the period, however, the 'PG' classification exchanged third and fourth place with the 'U' classification. The smaller number of releases associated with these two classifications (this is also true of the '18' classification) means their share of the box office is more susceptible to the effects of a few high earning titles.

Figure 12 Percentage of gross box office of releases in the UK and Republic of Ireland by film classification, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
U	11.6	17.8	15.4	10.3	16.3	11.8	15.1	12.0	15.6	9.4
PG	18.1	18.3	10.3	13.7	10.7	11.9	6.3	15.7	14.1	25.2
12A	41.6	37.7	44.7	51.8	45.5	44.3	55.7	39.8	43.9	40.7
15	22.1	22.7	27.8	22.3	24.4	27.2	18.7	31.7	22.3	22.1
18	6.5	3.4	1.8	1.9	3.0	4.7	4.3	0.8	4.0	2.6

Source: comScore, BBFC, BFI RSU analysis

Note: Figures as at 21 February 2019.

SPECIALISED FILMS AT THE UK BOX OFFICE IN 2018

Specialised films offer audiences an experience of cinema that is very different from the titles that dominate the overall box office charts. The BFI's definition of 'specialised' is broad and relates to those films that do not sit easily within a mainstream and highly commercial genre. Many are from the independent production sector (although they may be handled by a mainstream, studio-based distributor) or are made with a low production budget (compared to a studio production) and may focus more on script and character than on effects and star names. Specifically, the BFI considers most subtitled foreign language films, documentaries and re-releases of archive/classic films to be 'specialised'. In recent years some mainstream films, such as *Terminator 2: Judgement Day* (released in 2017), which were originally made and shown in 2D, have been officially 're-released' in the 3D format. These 're-releases' are not considered as specialised films in the present analyses.

In a change from previous editions of the Yearbook, non-mainstream films which do not fall into the three main categories but are also considered to be specialised are not included in the following data, due to the subjectivity regarding the categorisation of these films. Generally these films can be described as having a distinctive genre, hook or style, or are films which deal with more complex and challenging subject matter than the majority of mainstream films. (Non-feature film releases, such as recorded live performances, are not considered to be specialised; they are categorised as event cinema. For more information, see the Distribution and exhibition chapter.)

In total, 454 documentaries, foreign language films and re-releases were shown at UK cinemas in 2018, representing 58% of all theatrical releases in the year (Table 20). These films grossed £39.5 million, a 3% share of total box office earnings.

Table 20 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2018

Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	110	14.0	8.3	0.6	24
Foreign language	331	42.6	30.3	2.3	29
Re-release	43	5.5	3.2	0.2	55
All specialised films*	**454**	**57.7**	**39.5**	**3.0**	**31**
All films	**787**	**100.0**	**1,304.8**	**100.0**	**109**

Source: comScore, BFI RSU analysis

Notes:

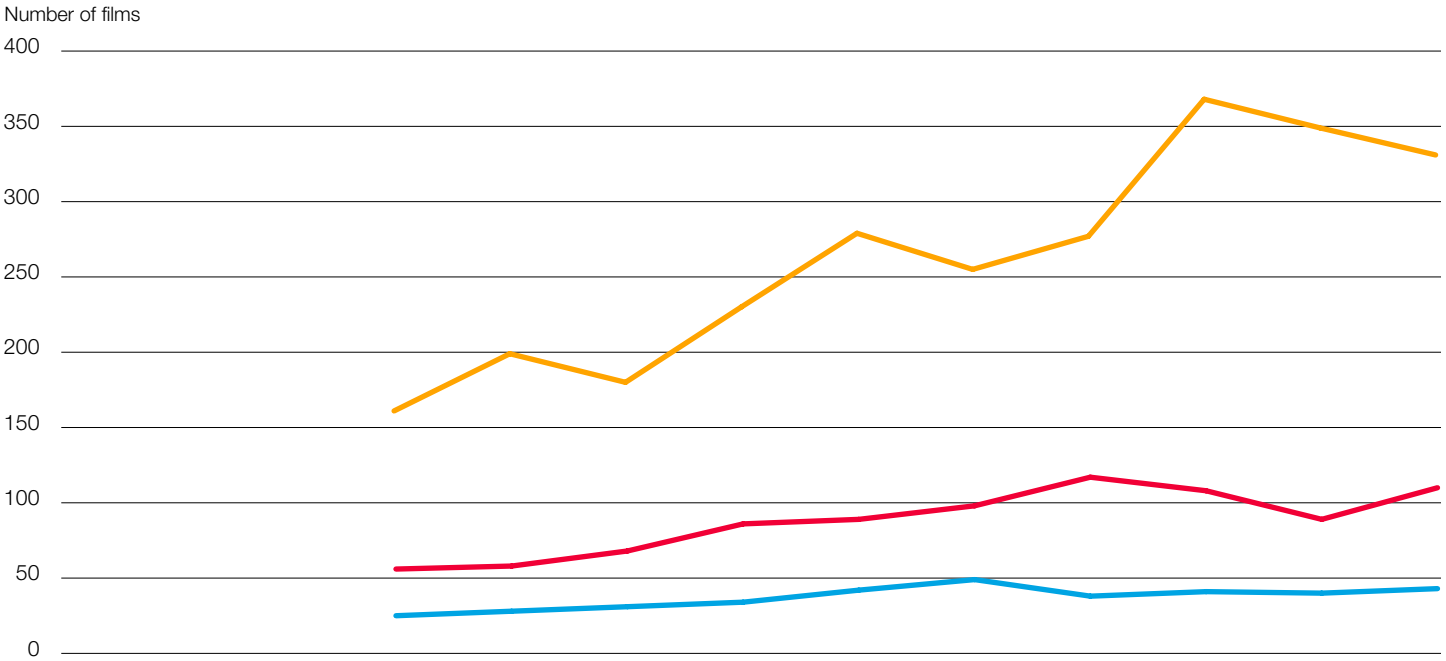
* Due to some overlap of categories (e.g. a film such as *Burn the Stage: The Movie* is categorised as both a foreign language film and a documentary) this total refers to the number of specialised films, not the sum total of the categories in the table. This total does not include the category of 'other specialised films' which has been used in previous Yearbooks.

Figures as at 21 February 2019.

TRENDS IN SPECIALISED FILM

The volume of specialised films released in the UK has increased significantly over the 10-year period 2009-2018. As Figure 13 shows, there has been a steady rise in the number of theatrically released feature documentaries over the last decade, from a low of 56 in 2009 to 110 in 2018, while the number of re-released films has increased from a low of 25 in 2009 to 43 in 2018. Foreign language films have seen the greatest increase over the period (106%), and whilst they continue to deliver a very small share of total box office revenues, there is evidence that there is an increasing appetite amongst a more ethnically diverse UK population for a wider range of films not made in the English language.

Figure 13 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Documentary	56	58	68	86	89	98	117	108	89	110
Foreign language	161	199	180	230	279	255	277	368	349	331
Re-release	25	28	31	34	42	49	38	41	40	43

Source: comScore, BFI RSU analysis

Note: There is some overlap in these categories as a small number of films are assigned to more than one specialised film category.

NON-ENGLISH LANGUAGE FILMS

Films in 45 different languages (including English) were released in the UK and Republic of Ireland in 2018, six more than in 2017. There were also two releases with no spoken dialogue: the re-release of the 1928 silent classic Shiraz, an epic romance set in Mughal India, and *The Marvellous Mabel Normand: The Leading Lady of Film Comedy,* a compilation of four short films from one of the major artist-filmmakers of silent cinema.

Foreign language films accounted for 43% of all theatrical releases in 2018 and earned £30 million (2% of overall box office gross). There were 331 foreign language film releases, down from 349 in 2017. In terms of both numbers and box office gross, films in Hindi were the most popular non-English language releases in 2018, generating £12 million from 53 titles. If combined, cinema releases in all the languages of the Indian subcontinent would account for 169 films, more than one fifth (21%) of all releases in 2018. There were 112 films in European languages (other than English) accounting for 14% of all releases.

Table 21 shows the number of releases and box office takings for films in English and English with other languages, followed by the top 10 highest earning non-English languages for releases in 2018.

Table 21 Languages of films released in the UK and Republic of Ireland, 2018 (ranked by gross box office)

	Main language	Number of releases	Gross box office (£ million)	Box office share (%)
	English	428	1,270.5	97.4
	English with others*	26	4.3	0.3
1	Hindi	53	12.3	0.9
2	Polish	15	4.6	0.3
3	Tamil	35	2.3	0.2
4	French	36	1.8	0.1
5	Japanese	10	1.5	0.1
6	Punjabi	29	1.0	0.1
7	Spanish	6	0.9	0.1
8	Urdu	6	0.7	0.1
9	Korean	3	0.7	0.1
10	Russian	8	0.5	<0.1
	Other (34 languages)	130	2.6	0.2

Source: comScore, BBFC, IMDb, BFI RSU analysis

Notes:

* 'English with others' includes films for which the main language was English but with extensive use of other languages, such as *Black 47* in English and Irish.

Figures as at 21 February 2019.

Box office totals may not match other charts due to rounding.

Image: *Shoplifters* courtesy of Thunderbird Releasing

Table 22 shows the top 10 highest earning non-Hindi foreign language films of 2018. For the first time since our records began, the top non-Hindi release at the UK box office was a Polish language title. The controversial Catholic Church drama *Clergy* (the highest earning film in Poland in the past decade) grossed £1.3 million at the UK and Republic of Ireland box office. There are three other Polish language films in the list, including Pawel Pawlikowski's Oscar® nominated drama *Cold War*, which was the only other non-Hindi language release to gross over £1 million in the year. Polish language films have become an increasing presence in this table in recent years, reflecting the fact that Polish is now the most commonly spoken non-native language in England and Wales (2011 Census).

Five of the films in the list are in Asian languages. There are three releases in non-Hindi languages from the Indian subcontinent: two in Tamil - *2.0* and *Sarkar* – and one in Urdu - *Jawani Phir Nahi Ani 2*. There is one film in Japanese - the 2018 Palme d'Or winner *Shoplifters* - and one in Korean - *Burn the Stage: The Movie,* a music documentary about K-Pop band BTS, which premiered as an event cinema release before going on general release. The only non-Polish European language title is *A Fantastic Woman* (in Spanish), the winner of the 2018 Oscar® for Best Foreign Language Film.

Table 22 Top 10 foreign language films (excluding Hindi*) released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	Clergy	Pol	1.3	Phoenix	Polish
2	Cold War	UK/Pol/Fra	1.1	Curzon Artificial Eye	Polish
3	Women of Mafia	Pol	0.9	Phoenix	Polish
4	2.0	Ind	0.7	Ayngaran	Tamil
5	Shoplifters	Jpn	0.7	Thunderbird	Japanese
6	Burn the Stage: The Movie	Kor	0.7	Trafalgar	Korean
7	Sarkar	Ind	0.5	Murugan Talkies	Tamil
8	Jawani Phir Nahi Ani 2	Pak	0.4	B4U Network	Urdu
9	A Fantastic Woman	Chl/Ger/Spa/USA	0.4	Curzon Artificial Eye	Spanish
10	Pitbull: Last Dog	Pol	0.3	Kino Project	Polish

Source: comScore, BBFC, IMDb, BFI RSU analysis, distributor websites

Notes:

* For Hindi language titles, see Table 23.

Figures as at 21 February 2019.

Table 23 shows the top 10 Hindi language film releases of 2018. The list is headed by the overall top earning foreign language film of the year, the epic period drama *Padmaavat,* with box office takings of £2.2 million. Two other Hindi releases broke the £1 million barrier at the UK box office in 2018: Bollywood biopic *Sanju* earned £1.3 million, while crime thriller *Race 3* grossed £1.2 million.

Table 23 Top 10 Hindi language films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	UK box office total (£ million)	Distributor
1	Padmaavat	Ind	2.2	Paramount
2	Sanju	Ind	1.3	20th Century Fox
3	Race 3	Ind	1.2	Yash Raj
4	Simmba	Ind	0.8	Reliance Entertainment
5	Zero	Ind	0.7	Yash Raj
6	Thugs of Hindostan	Ind	0.7	Yash Raj
7	Veere Di Wedding	Ind	0.6	Zee Studios
8	Baaghi 2	Ind	0.5	20th Century Fox
9	Raazi	Ind	0.4	Zee Studios
10	Badhaai Ho	Ind	0.4	Digital Cinema Prints International

Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 21 February 2019.

Table 24 shows the 10 highest grossing non-English language films released in the UK and Republic of Ireland between 2001 and 2018. The most recent addition to the list is the 2013 release *Dhoom: 3* (the first film in Hindi to appear in the top 10 since our records began), indicating that despite the growing number of foreign language films released in the UK, most continue to have niche or limited appeal.

The list is headed by Mel Gibson's *The Passion of the Christ* which earned £11.1 million in 2004. The biblical drama, which was mainly shot in Aramaic, is one of two films by Gibson in the top 10: his Mayan language actioner *Apocalypto* is in fourth place with £4.1 million. There are three Mandarin language films in the list: Ang Lee's *Crouching Tiger, Hidden Dragon* (£9.4 million) and two films from Zhang Yimou – *Hero* and *House of Flying Daggers* – both of which earned £3.8 million. All three of these films are wuxia martial arts titles, which highlights the popularity of the genre with UK audiences in the early 2000s. The highest earning European language title is Jean-Pierre Jeunet's 2001 release *Amélie* (in French) which grossed £5 million.

Table 24 Top 10 non-English language films released in the UK and Republic of Ireland, 2001-2018

	Title	Language	UK box office total (£ million)	Distributor	Year of release
1	The Passion of the Christ	Aramaic/Latin/Hebrew	11.1	Icon	2004
2	Crouching Tiger, Hidden Dragon	Mandarin	9.4	Sony	2001
3	Amélie	French	5.0	Momentum	2001
4	Apocalypto	Mayan	4.1	Icon	2007
5	Hero	Mandarin	3.8	Walt Disney	2004
6	House of Flying Daggers	Mandarin	3.8	Pathé	2004
7	Volver	Spanish	2.9	Pathé	2006
8	The Motorcycle Diaries	Spanish	2.8	Pathé	2004
9	Pan's Labyrinth	Spanish	2.7	Optimum	2006
10	Dhoom: 3	Hindi	2.7	Yash Raj	2013

Source: comScore, BFI RSU analysis

DOCUMENTARIES

A total of 110 feature documentaries (14% of theatrical releases) were shown at the UK and Republic of Ireland box office in 2018, up from 89 in 2017. These films earned £8.3 million which was 0.6% of the overall box office gross.

We have split the analysis of this category into the more traditional expository or observational style of documentary and 'concert' documentaries, which feature coverage of a particular performance and behind-the-scenes footage of popular musical performers. The most successful traditional documentary of 2018 was the Oscar® winning *Free Solo*, which chronicles the first-ever ropeless ascent of the notorious el Capitan peak in Yosemite National Park by American climber Alex Honnold, with £1.7 million, while the top earning concert documentary was *Burn the Stage: The Movie*, which follows the 2017 world tour of South Korean boy band BTS, with £0.7 million. Both of these films appear in the following tables.

Table 25 shows the top 10 non-concert documentaries released in the UK and Republic of Ireland since 2002. The list is headed by Michael Moore's *Fahrenheit 9/11*, which earned £6.5 million in 2004. (This is regarded as the highest grossing non-concert documentary of all time because, even with price inflation, it is unlikely that any documentary films before 2002 will have earned more in nominal terms.) Asif Kapadia's 2015 release *Amy* (£3.8 million) is second, and the 2005 natural history release *March of the Penguins* (£3.3 million) is third. *Free Solo* is the only 2018 release in the list.

Five of the top 10 non-concert documentaries released since 2002 are UK films. The highest grossing UK documentary of 2018, *They Shall Not Grow Old*, which earned £0.9 million, would rank in 15th place.

Image: *Free Solo* (National Geographic/Jimmy Chin)

Table 25 Top 20 non-concert feature documentaries released in the UK and Republic of Ireland, 2002-2018

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Fahrenheit 9/11	USA	2004	6.5	200	Optimum
2	Amy	UK	2015	3.8	280	Altitude
3	March of the Penguins	Fra	2005	3.3	163	Warner Bros
4	Senna	UK	2011	3.2	358	Universal
5	Touching the Void	UK	2003	2.6	50	Pathé
6	Bowling for Columbine	USA	2002	1.7	37	Momentum
7	Free Solo	USA	2018	1.7	59	Dogwoof
8	TT3D: Closer to the Edge	UK	2011	1.3	125	CinemaNX
9	The Imposter	UK/USA	2012	1.1	77	Picturehouse/ Revolver
10	Super Size Me	USA	2004	1.1	83	Tartan

Source: comScore, BFI RSU analysis

Notes:

The table does not include concert performance documentaries, IMAX-only documentaries and shorts.

Based on box office data for 2002-2018.

Table 26 shows the top 10 concert documentaries released in the UK since 2008. The highest grossing title released during the period is *Michael Jackson's This Is It,* which earned £9.8 million in 2009. The 2018 release *Burn the Stage: The Movie* appears in 10th place. The K-Pop boy band documentary is the first foreign language entry to appear in this table.

Table 26 Top 10 concert documentaries released in the UK and Republic of Ireland, 2008-2018

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Michael Jackson's This Is It	USA	2009	9.8	498	Sony
2	One Direction: This Is Us	UK/USA	2013	8.0	479	Sony
3	Justin Bieber: Never Say Never	USA	2011	2.3	388	Paramount
4	The Beatles: Eight Days a Week	USA	2016	1.2	102	StudioCanal
5	Katy Perry: Part of Me	USA	2012	1.2	326	Paramount
6	Hannah Montana/Miley Cyrus: Best of Both Worlds Concert	USA	2008	0.8	65	Walt Disney
7	U2 3D	USA	2008	0.7	67	Revolver
8	Glee: The 3D Concert Movie	USA	2011	0.7	335	20th Century Fox
9	Shine a Light	USA/UK	2008	0.7	159	20th Century Fox
10	Burn the Stage: The Movie	Kor	2018	0.7	212	Trafalgar

Source: comScore, BFI RSU analysis

RE-RELEASES

In 2018, 43 archive/classic titles were re-released in the UK and Republic of Ireland, three more than in 2017. According to comScore, these films accounted for 5.5% of the year's theatrical releases and generated a combined gross of £3.2 million (0.2% of the total box office). However, not all box office revenues for re-releases are tracked by comScore, which primarily focuses on first-run films. Some additional revenue for films, which tend to be booked for a limited time into specialised cinemas long after their initial release, is missing from this analysis, so the actual box office share is likely to be greater.

Table 27 shows the top 10 re-releases at UK and Republic of Ireland cinemas since 2000. (The table does not include titles originally released in 2D which were re-released in 3D as these are considered to be mainstream films rather than specialised.) The list is topped by Stanley Kubrick's *A Clockwork Orange*, which grossed £2.1 million from its 2000 re-release. Two other specialised re-releases have grossed over £1 million - Steven Spielberg's 20th anniversary re-release of *E.T.* (2002) and the 25th anniversary re-release of sci-fi comedy *Back to the Future* (2010). Two films re-released in 2018 appear in the list: Frank Capra's perennial Christmas favourite *It's a Wonderful Life* is in seventh place with takings of £0.5 million and the 40th anniversary re-release of *Grease* is in ninth place with a similar take.

Table 27 Top 10 re-releases at the UK and Republic of Ireland box office, 2000-2018

	Title (year of original release)	Country of origin	Year of re-release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	A Clockwork Orange (1972)	UK	2000	2.1	328	Warner Bros
2	E.T. (20th anniversary) (1982)	USA	2002	2.1	313	UIP
3	Back to the Future (25th anniversary) (1985)	USA	2010	1.2	273	Universal
4	Blade Runner: The Final Cut (1982)	UK/USA/ HK	2015	0.8	136	BFI
5	Alien (Director's Cut) (1979)	UK/USA	2003	0.5	134	20th Century Fox
6	Jurassic Park (1993)	USA	2011	0.5	277	Universal
7	It's a Wonderful Life (1946)	USA	2018	0.5	165	Park Circus
8	Apocalypse Now (Redux) (1979)	USA	2001	0.5	22	Walt Disney
9	Grease (40th anniversary) (1978)	USA	2018	0.5	336	Park Circus
10	Jaws (1975)	USA	2012	0.4	319	Universal

Source: comScore, BFI RSU analysis

UK FILMS AND BRITISH TALENT WORLDWIDE

Facts in focus

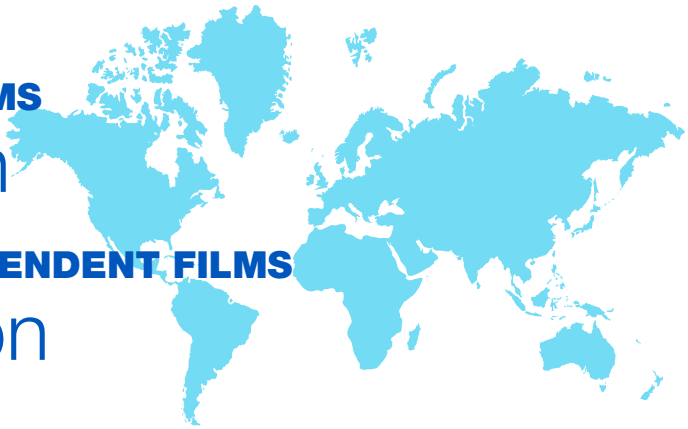
UK FILMS WORLDWIDE BOX OFFICE SHARE 2018

23%

ALL UK FILMS
$9.4bn

3%

UK INDEPENDENT FILMS
$1.3bn



THE HIGHEST EARNING UK FILMS IN 2018

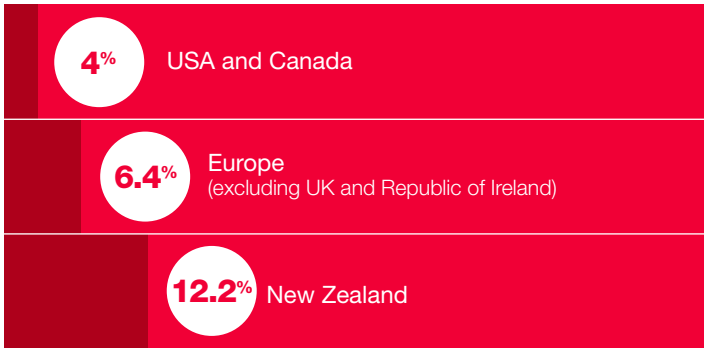
TOP EARNING UK FILM WORLDWIDE

AVENGERS: INFINITY WAR
$1.7bn

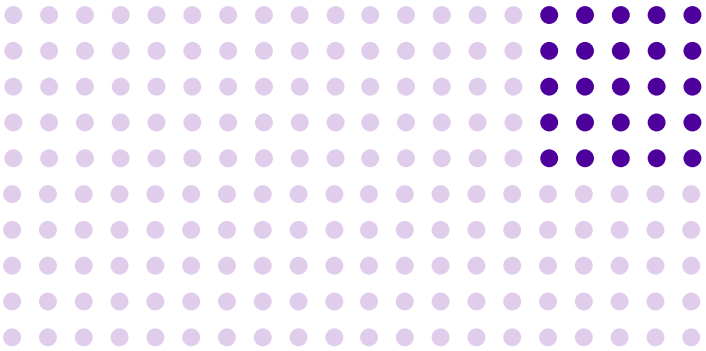
RED SPARROW
$115.5m

TOP EARNING UK INDEPENDENT FILM WORLDWIDE

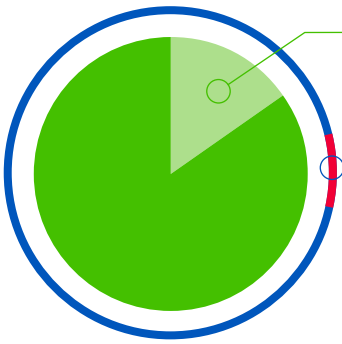
INDEPENDENT UK FILMS' BOX OFFICE SHARE 2018



UK DIRECTORS HELMED 25 OF THE 200 HIGHEST EARNING FILMS WORLDWIDE SINCE 2001



OF THE 200 HIGHEST EARNING FILMS SINCE 2001



36 films are based on stories and characters created by UK writers

These films have earned **$28 billion** at the worldwide box office

British acting talent has played lead and/or supporting roles in **70%** of these films

UK films and British talent won **25** major film awards in 2018/19, including:

5 Oscars®

13 BAFTAs

UK films and British talent worldwide

UK FILMS AT THE GLOBAL BOX OFFICE

UK qualifying films earned a combined worldwide gross of $9.4 billion in 2018, a 23% share of the global box office, which broke the $40 billion barrier for the first time. Earnings for UK films equalled the record set in 2015 but represented a smaller proportion of global box office receipts compared with the 25% share achieved in 2015 (Table 1). There has been a notable increase in the market share for UK films from 2015 onwards (2009-2014 average total share: 12.9%, 2015-2018 average total share: 21.3%).

UK studio-backed films (productions wholly or partly financed and controlled by one of the major US studios but which qualify as British under the cultural test for film) shared 19.5% of the worldwide box office in 2018, with earnings of $8.1 billion. This was second only to the record gross ($8.3 billion) achieved by UK studio-backed titles in 2015. Global earnings for UK independent films set a new record in 2018 with a total gross of $1.3 billion (the previous high was the $1.2 billion generated in 2014) which represented 3.2% of global revenues, the same share as in 2014.

Table 1 UK films global market share, 2009-2018

Year	Global theatrical market (US$ billion)	UK films worldwide gross (US$ billion)	UK share (%)	UK studio-backed films* share (%)	UK independent films share (%)
2009	29.5	2.0	6.8	4.4	2.4
2010	31.7	4.5	14.2	12.6	1.6
2011	33.3	5.6	16.8	14.1	2.8
2012	34.9	5.3	15.2	13.3	1.8
2013	35.5	4.1	11.5	9.8	1.6
2014	36.1	4.7	13.0	9.7	3.2
2015	38.2	9.4	24.6	21.8	2.8
2016	37.6	6.5	17.3	16.0	1.3
2017	39.4	8.1	20.6	18.6	2.0
2018	41.4	9.4	22.8	19.5	3.2

Source: BFI, comScore, IHS Markit

Notes:

'Global theatrical market' here is a total of the takings from the 60 territories' box office reported by IHS Markit.

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

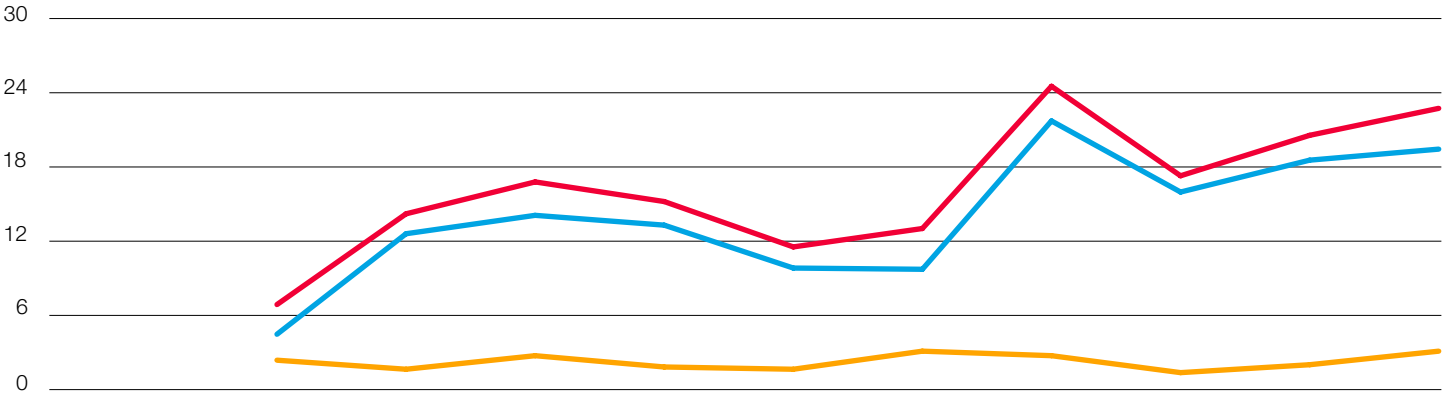
Figures for 2017 updated since publication of the 2018 Yearbook.

The annual global market share for UK films is closely aligned with the success of inward investment titles supported by the major Hollywood studios (Figure 1). The share of the market achieved by these studio-backed films fluctuates from year to year and is largely dependent on the performance of a small number of titles. The peak achieved in 2015 (22%) was propelled by the success of *Star Wars: The Force Awakens* ($1.9 billion) and *Avengers: Age of Ultron* ($1.4 billion). The highest grossing UK studio-backed titles in 2018 were *Avengers: Infinity War* ($1.7 billion) and *Jurassic World: Fallen Kingdom* ($1.1 billion).

The annual global market share for UK qualifying independent films has been more consistent over the period, ranging between 1.3% (2016) and 3.2% (2014 and 2018). As with the blockbuster UK studio-backed films, the impact of breakout independent titles on the annual market share is significant. The highest earning releases in 2014 were *The Imitation Game* ($228 million), *Non-Stop* ($223 million) and *Paddington* ($137 million) while the top grossing titles in 2018 were *Red Sparrow* ($115.5 million), *Johnny English Strikes Again* ($112 million) and *The Commuter* ($90 million).

Figure 1 UK films global market share, 2009-2018

% of worldwide box office



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total UK share (%)	6.8	14.2	16.8	15.2	11.5	13.0	24.6	17.3	20.6	22.8
UK studio-backed films* share (%)	4.4	12.6	14.1	13.3	9.8	9.7	21.8	16.0	18.6	19.5
UK independent films share (%)	2.4	1.6	2.8	1.8	1.6	3.2	2.8	1.3	2.0	3.2

Source: BFI, comScore, IHS Markit

See notes to Table 1.

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

The 2018 list of the top 10 highest earning UK qualifying films at the worldwide box office is made up exclusively of studio-backed titles, the majority of which are either franchise films or sequels (Table 2). For the fourth consecutive year, no independent UK films feature in the list.

Table 2 Top 10 UK qualifying films worldwide, 2018

Rank	Title	Country of origin	Worldwide box office gross (US$ million)
1	Avengers: Infinity War	UK/USA	1,705.2
2	Jurassic World: Fallen Kingdom	UK/USA	1,123.7
3	Venom	UK/USA	758.5
4	Bohemian Rhapsody	UK/USA	749.7
5	Mission: Impossible – Fallout	UK/USA	671.3
6	Fantastic Beasts: The Crimes of Grindelwald	UK/USA	562.5
7	Ready Player One	UK/USA	502.0
8	Solo: A Star Wars Story	UK/USA	356.6
9	Mamma Mia! Here We Go Again	UK/USA	327.1
10	Mary Poppins Returns	UK/USA	287.8
	Total top 10		**7,044.5**

Source: BFI, comScore

Notes:

'Box office gross' is a total of the takings from a selection of 23 markets (including the UK and Republic of Ireland), as reported by comScore, and is cumulative gross box office up to 21 February 2019 in territories where the film was released in 2018. Box office takings from territories where the film was released in 2017 or 2019 are not included in this total.

Figures may not sum to total due to rounding.

Table 3 looks at the top 10 highest earning independent films which qualify as British under the cultural test for film. The list is headed by *Red Sparrow* with worldwide earnings of $115.5 million followed by *Johnny English Strikes Again* with $112 million. These were the only two UK independent films to earn over $100 million from their release in worldwide territories in 2018, the same number as in 2017.

Table 3 Top 10 UK independent films worldwide, 2018

Rank	Title	Country of origin	Worldwide box office gross ($ million)
1	Red Sparrow	UK/USA#	115.5
2	Johnny English Strikes Again	UK/Fra	112.3
3	The Commuter	UK/USA#	90.0
4	Three Billboards Outside Ebbing, Missouri*	UK/USA#	83.5
5	Widows	UK/USA#	68.9
6	Darkest Hour*	UK/USA#	68.5
7	Robin Hood	UK/USA#	64.2
8	Isle of Dogs	UK/USA#	60.0
9	Paddington 2*	UK/Fra	57.7
10	Adrift	UK/USA#	52.9
	Total gross		**773.6**

Source: BFI, comScore

See notes to Table 2.

* *Three Billboards Outside Ebbing, Missouri, Darkest Hour* and *Paddington 2* also featured in the 2017 list as these films were re leased in some territories in that year, grossing $33m, $47m and $131m respectively.

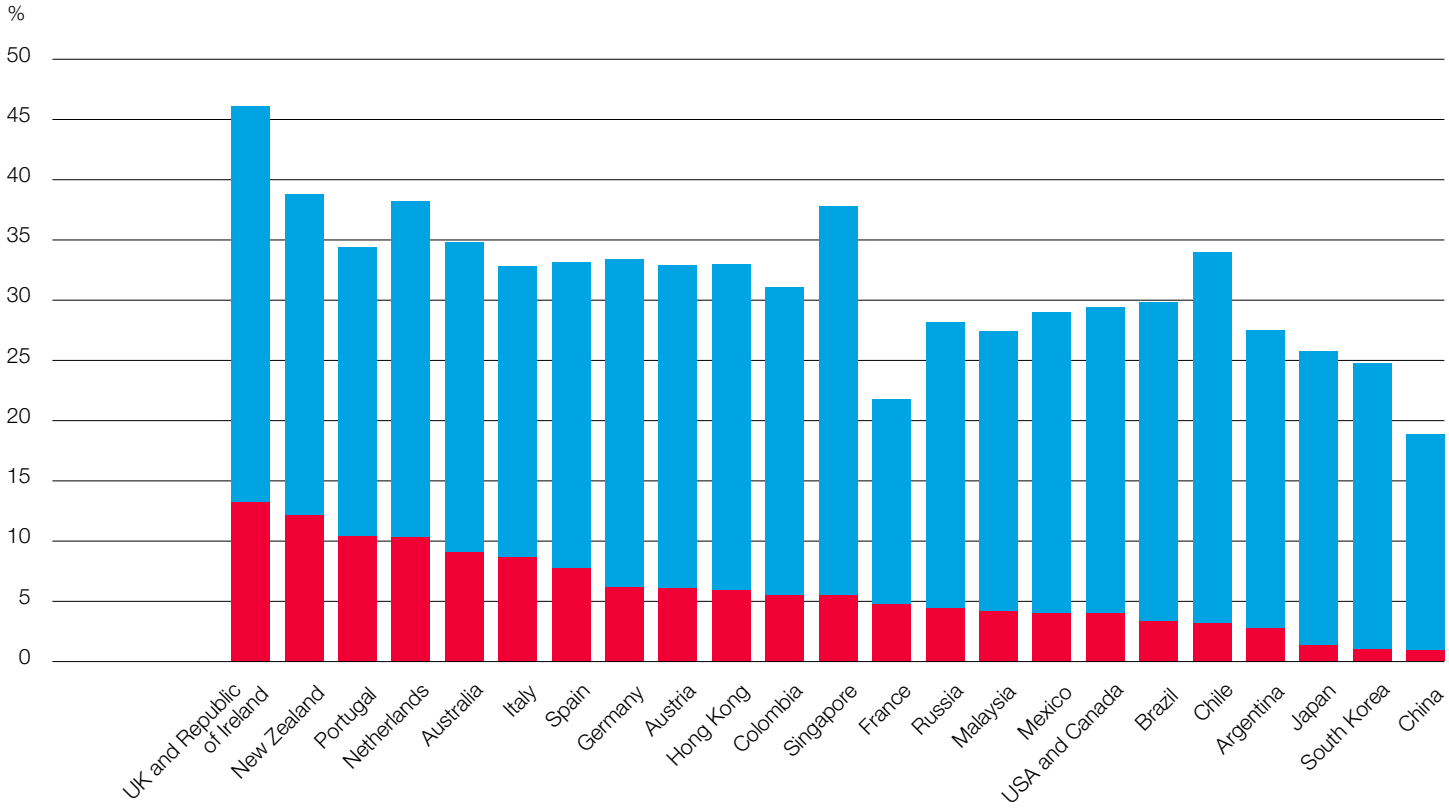
Film made with independent (non-studio) US support.

Figures may not sum to totals due to rounding.

Image: *Red Sparrow* courtesy of Twentieth Century Fox. All rights reserved

Figure 2 shows the market share of UK films in 23 selected global territories, ranked by the share for UK independent films. The share for the UK and Republic of Ireland is included for comparison. After the UK and Republic of Ireland, New Zealand had the second highest share for independent UK films in 2018 at 12.2%, followed by Portugal with 10.4%.

Figure 2 UK market share in selected global territories, 2018



	UK and Republic of Ireland	New Zealand	Portugal	Netherlands	Australia	Italy	Spain	Germany	Austria	Hong Kong	Colombia	Singapore	France	Russia	Malaysia	Mexico	USA and Canada	Brazil	Chile	Argentina	Japan	South Korea	China
UK independent film share (%)	13.2	12.2	10.4	10.3	9.1	8.7	7.8	6.2	6.1	5.9	5.5	5.5	4.8	4.4	4.2	4.0	4.0	3.4	3.2	2.8	1.4	1.0	0.9
UK studio-backed film* share (%)	32.9	26.6	24.0	27.9	25.7	24.1	25.4	27.2	26.8	27.1	25.6	32.3	17.0	23.8	23.2	25.0	25.4	26.4	30.8	24.7	24.4	23.8	17.9
Total UK share (%)	46.1	38.8	34.4	38.2	34.8	32.8	33.2	33.4	32.9	33.0	31.1	37.8	21.8	28.2	27.4	29.0	29.4	29.8	34.0	27.5	25.8	24.8	18.8

Source: BFI, comScore

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

UK FILMS IN NORTH AMERICA

As with the global market, the annual share achieved by UK films in the North American theatrical market (the USA and Canada) fluctuates depending on the performance of a small number of titles (Table 4). UK films earned $3.4 billion at the box office in North America in 2018, 29.3% of the theatrical market and the highest share since our analysis began. The share for UK studio-backed titles was 25.4% ($2.9 billion), the third highest point since our records began, and for UK independent films was 4.0% ($460 million), a record high for this market.

Table 4 UK market share in the USA and Canada, 2009-2018

Year	Total UK films share %	UK studio-backed films* share %	UK independent films share %
2009	6.6	5.5	1.1
2010	14.2	12.4	1.8
2011	16.5	15.3	1.2
2012	16.2	14.6	1.5
2013	11.9	10.5	1.4
2014	15.6	12.4	3.1
2015	28.8	25.6	3.2
2016	22.0	20.3	1.7
2017	29.1	26.4	2.7
2018	29.3	25.4	4.0

Source: BFI, comScore

Notes:

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Figures may not sum to totals due to rounding.

As Table 5 shows, the top two UK films at the global box office in 2018 also head the list of highest grossing UK titles in the North American market, where earnings for the top 20 UK films reached just over $3 billion. *Avengers: Infinity War* ($679 million) and *Jurassic World: Fallen Kingdom* ($418 million) were the second and fourth highest earning titles overall in the USA and Canada in 2018. Six of the top 20 UK films earned over $200 million, compared with four films in 2017, while there are four independent UK titles in the top 20, down from seven in 2017. The top performing UK independent title was *Red Sparrow* with earnings of $47 million.

Table 5 Top 20 UK films in the USA and Canada (including co-productions), 2018

Rank	Title	Country of origin	USA and Canada box office gross (US$ million)
1	Avengers: Infinity War	UK/USA	678.8
2	Jurassic World: Fallen Kingdom	UK/USA	417.7
3	Mission: Impossible – Fallout	UK/USA	220.2
4	Solo: A Star Wars Story	UK/USA	213.8
5	Venom	UK/USA	213.5
6	Bohemian Rhapsody	UK/USA	212.3
7	Mary Poppins Returns	UK/USA	170.7
8	Fantastic Beasts: The Crimes of Grindelwald	UK/USA	159.5
9	Ready Player One	UK/USA	137.7
10	Mamma Mia! Here We Go Again	UK/USA	120.6
11	Christopher Robin	UK/USA	99.2
12	Pacific Rim: Uprising	UK/USA	59.9
13	Tomb Raider	UK/USA	58.3
14	The Nutcracker and the Four Realms	UK/USA	54.9
15	Red Sparrow	UK/USA*	46.9
16	Sherlock Gnomes	UK/USA/Can	43.2
17	Widows	UK/USA*	42.4
18	Paddington 2	UK/Fra	40.9
19	The Commuter	UK/USA*	36.3
20	Annihilation	UK/USA	32.7
	Total top 20		**3,059.5**

Source: BFI, comScore

See notes to Table 2.

* Film made with independent (non-studio) US support.

UK FILMS IN EUROPE

Outside the UK and Republic of Ireland, the overall market share for UK films in 2018 in the major European territories, including Russia, was 29.6%. Shares ranged from a high of 38% in the Netherlands to 22% in France (Table 6). The largest share for UK independent films was recorded in Portugal (10.4%) where *Johnny English Strikes Again* was the top independent title. Overall, in the selected European territories, UK independent films generated an average of 6.4% of box office revenues, a substantial increase on the 2.4% recorded in 2017.

Table 6 UK market share in selected European territories, 2018

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK stdio-backed films* share (%)	UK independent films share (%)	Top independent UK film
Netherlands	131.2	38.2	27.9	10.3	Johnny English Strikes Again
Portugal	33.5	34.4	24.0	10.4	Johnny English Strikes Again
Germany	331.4	33.4	27.2	6.2	Red Sparrow
Spain	221.5	33.2	25.4	7.8	Red Sparrow
Austria	44.6	32.9	26.8	6.1	Johnny English Strikes Again
Italy	202.9	32.8	24.1	8.7	Darkest Hour
Russia	232.4	28.2	23.8	4.4	Paddington 2#
France†	301.9	21.9	17.0	4.8	Three Billboards Outside Ebbing, Missouri
Total eight territories	**1,499.5**	**29.6**	**23.2**	**6.4**	**Red Sparrow**

Source: BFI, comScore

See notes to Table 2.

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Paddington 2 was released in all other European territories in 2017.

† The RSU only receives admissions figures for France and so calculates the box office gross by multiplying the number of admissions by the average price of a cinema ticket in the territory. As this figure is necessarily an estimate, it should be treated with some caution.

Figures may not sum to totals due to rounding.

Image: *Venom* photo by Frank Masi ©2018 CTMG, Inc. All Rights Reserved. Courtesy of Sony Pictures

The most popular UK film in the selected European territories in 2018 was *Avengers: Infinity War* with an eight-territory gross of $181 million. Three other titles generated receipts in excess of $100 million: *Bohemian Rhapsody, Fantastic Beasts: The Crimes of Grindelwald* and *Jurassic World: Fallen Kingdom* (Table 7). *Red Sparrow* was the highest earning independent UK film overall across the territories with earnings of $37.5 million. In total, six of the top 20 titles were UK independent films, the same number as in 2017.

Table 7 Top 20 UK films in selected European territories, 2018

Rank	Film Title	Country of origin	Box office gross (US$ million)
1	Avengers: Infinity War	UK/USA	181.3
2	Bohemian Rhapsody	UK/USA	177.9
3	Fantastic Beasts: The Crimes of Grindelwald	UK/USA	146.6
4	Jurassic World: Fallen Kingdom	UK/USA	131.8
5	Venom	UK/USA	98.4
6	Mission: Impossible – Fallout	UK/USA	74.1
7	Mamma Mia! Here We Go Again	UK/USA	60.0
8	Ready Player One	UK/USA	54.8
9	Mary Poppins Returns#	UK/USA	51.1
10	Solo: A Star Wars Story	UK/USA	50.8
11	The Nutcracker and the Four Realms	UK/USA	44.8
12	Red Sparrow	UK/USA*	37.5
13	Tomb Raider	UK/USA	37.1
14	Three Billboards Outside Ebbing, Missouri	UK/USA*	33.7
15	Johnny English Strikes Again	UK/Fra	29.6
16	Pacific Rim: Uprising	UK/USA	28.1
17	The Commuter	UK/USA*	22.2
18	Darkest Hour	UK/USA*	20.8
19	Christopher Robin	UK/USA	16.8
20	Early Man	UK/USA*	15.1
	Total eight territories		**1,312.5**

Source: BFI, comScore

See notes to Table 2.

* Film made with independent (non-studio) US support.

Mary Poppins Returns was released in 2018 in all of the selected European territories except for Russia.

UK FILMS IN LATIN AMERICA

The overall market share for UK films in the selected Latin American territories listed in Table 8 was 30%; the share in individual territories ranged from 34% in Chile to 28% in Argentina. The most popular UK film in Latin America in 2018 was *Avengers: Infinity War* with a five-territory gross of $172 million. The Marvel Cinematic Universe title was also the most successful film release overall in every territory apart from Argentina, where it was the second highest grossing film. *The Commuter* was the top grossing independent UK film across the combined territories with earnings of $9 million.

Table 8 UK market share in selected Latin American territories, 2018

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio-backed films* share (%)	UK independent films share (%)	Top independent UK film
Chile	44.1	34.0	30.8	3.2	The Commuter
Colombia	51.2	31.1	25.6	5.5	The Commuter
Brazil	209.2	29.8	26.4	3.4	Robin Hood
Mexico	263.5	29.0	25.0	4.0	The Commuter
Argentina	71.7	27.5	24.7	2.8	The Commuter
Total five territories	**639.7**	**29.5**	**25.8**	**3.7**	**The Commuter**

Source: BFI, comScore

See notes to Table 2.

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

UK FILMS IN ASIA

The overall market share for UK films across the six Asian territories in Table 9 was 21%. Shares ranged from a high of 38% in Singapore to 19% in China. *Avengers: Infinity War* was the top grossing UK film in each of the territories (with the exception of Japan, where *Bohemian Rhapsody* was the overall top earning title), and was the top grossing film overall in Hong Kong, Malaysia and Singapore. The film made $524 million (31% of its total gross) from the selected Asian territories, with 67% ($352 million) of the six-territory total coming from China.

Johnny English Strikes Again was the highest earning UK independent film overall across the selected territories in 2018, with a total gross of $39 million. The film's Singapore earnings represented a 2.2% share of the territory's box office (the highest share for the title in any territory including the UK and Republic of Ireland) whilst its Chinese release made over $25 million (the highest gross in any territory including the UK and Republic of Ireland), which equates to over one fifth of its total global gross. Overall, UK independent films made almost 6% of their total 2018 worldwide gross at the Chinese box office but, because of the size of the Chinese theatrical market, had the smallest share (0.9%) of any of the territories covered in this analysis.

Table 9 UK market share in selected Asian territories, 2018

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio-backed films* share (%)	UK independent films share (%)	Top independent UK film
Singapore	53.9	37.8	32.3	5.5	Johnny English Strikes Again
Hong Kong	84.7	33.0	27.1	5.9	Johnny English Strikes Again
Malaysia	76.2	27.4	23.2	4.2	Johnny English Strikes Again
Japan	471.1	25.8	24.4	1.4	Paddington 2
South Korea	385.7	24.8	23.8	1.0	Paddington 2
China	1,652.1	18.8	17.9	0.9	Johnny English Strikes Again
Total six territories	**2,723.7**	**21.2**	**20.0**	**1.2**	**Johnny English Strikes Again**

Source: BFI, comScore

See notes to Table 2.

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Johnny English Strikes Again was not released in South Korea.

Image: *Johnny English Strikes Again* ©2018 Focus Features/Universal Pictures. Courtesy of Universal Studios Licensing LLC

UK FILMS IN AUSTRALASIA

Two of the three most popular films in both Australia and New Zealand in 2018 were UK studio-backed films. *Avengers: Infinity War* was the number one film in both territories while *Bohemian Rhapsody* was number two at the box office in Australia and number three at the box office in New Zealand. *Johnny English Strikes Again* was the highest earning independent UK film in both territories (Table 10).

Table 10 UK market share in selected Australasian territories, 2018

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio backed films* share (%)	UK independent films share (%)	Top independent UK film
New Zealand	53.6	38.8	26.6	12.2	Johnny English Strikes Again
Australia	312.7	34.9	25.7	9.1	Johnny English Strikes Again
Total two territories	**366.3**	**35.4**	**25.8**	**9.5**	**Johnny English Strikes Again**

Source: BFI, comScore

See notes to Table 2.

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

UK TALENT AND THE GLOBAL BOX OFFICE

Characters and stories created by UK authors consistently enthral film audiences around the world, while British film actors and directors have made a huge impact on films internationally. The UK itself is a global destination of choice for international film production thanks to the skills of its crews and state-of-the-art studios and facilities. British skills, talent and technical expertise play an important role in showcasing the UK's national identity – and creative abilities – across the globe.

Table 11 shows the global cultural and commercial influence of UK filmmaking skills and talent. Seven of the top 20 highest grossing films since 2001 were shot wholly or partly in the UK, while 15 of the top 20 films feature British actors in lead or supporting roles. One of the films, *Harry Potter and the Deathly Hallows: Part 2*, was helmed by a British director (David Yates) and based on a novel by a UK writer (JK Rowling). Also appearing in the top 20 is *Captain America: Civil War* which features superhero characters created by American writers Joe Simon and Jack Kirby, however the story for the film was based on a series of comic books penned by the British writer Mark Millar.

Table 11 Top 20 grossing films worldwide, 2001-2018

Rank	Title	Year	Gross box office (US$ million)	Country of origin	UK talent/ source material
1	Avatar	2009	2,790	USA	
2	Star Wars: The Force Awakens	2015	2,068	UK/USA	Lead and supporting actors
3	Avengers: Infinity War	2018	2,048	UK/USA	Supporting actors
4	Jurassic World	2015	1,672	USA	
5	Marvel Avengers Assemble	2012	1,520	USA	Supporting actors
6	Fast & Furious 7	2015	1,519	USA	Supporting actors
7	Avengers: Age of Ultron	2015	1,405	UK/USA	Supporting actors
8	Black Panther	2018	1,347	USA	Supporting actors
9	Harry Potter and the Deathly Hallows: Part 2	2011	1,342	UK/USA	Lead and supporting actors; Director; Source material
10	Star Wars: The Last Jedi	2017	1,333	UK/USA	Lead and supporting actors
11	Jurassic World: Fallen Kingdom	2018	1,310	UK/USA	Supporting actors
12	Frozen	2013	1,277	USA	
13	Beauty and the Beast (2017)	2017	1,264	UK/USA	Supporting actors
14	Incredibles 2	2018	1,243	USA	
15	Fast & Furious 8	2017	1,238	USA	Supporting actors
16	Iron Man 3	2013	1,216	USA/Chn	Supporting actors
17	Minions	2015	1,167	USA/Fra	Supporting actors
18	Captain America: Civil War	2016	1,154	USA/Ger	Supporting actors
19	Aquaman	2018	1,147	USA/Can	
20	Transformers: Dark of the Moon	2011	1,142	USA	Lead actor

Source: BFI, comScore

UK SOURCE MATERIAL

The global box office performance of UK films and foreign productions which draw on UK source material is a good indicator of the international impact and exposure of British culture. Of the top 200 grossing films released worldwide from 2001 to 2018, 36 films are based on stories and characters created by UK writers, and collectively these films have earned $28 billion at the global box office. The 36 films include one title released in 2018, *Fantastic Beasts: The Crimes of Grindelwald*, which was based on the writings of JK Rowling. As the original creative voice behind 10 of the top 200 earning films since 2001 (eight Harry Potter titles and two Fantastic Beasts titles), Rowling is the most influential UK author in the top 200 list. (Rowling also wrote the screenplays for the two Fantastic Beasts films.) Feature films based on her work have generated a worldwide box office of $9.2 billion, almost 6% of the total gross for the top 200 films. The list includes six films based on the Hobbit and Lord of the Ring novels of JRR Tolkien which have grossed $5.9 billion (almost 4% of the total gross of the top 200 films) and four films based on the work of James Bond creator Ian Fleming ($3.1 billion; 2% of the total gross of the top 200 films).

In addition to films adapted from published novels or books, the 36 films include four titles based on original screenplays, three of which - *Inception, Interstellar* and *Dunkirk* - were written or co-written by Christopher Nolan. (Nolan also co-wrote the scripts for two other top 200 titles, *The Dark Knight* and *The Dark Knight Rises*.) The other top 200 film based on an original script by a UK national is *Sing* which was written (and co-directed) by Garth Jennings. The 36 films include one title based on a musical, *Mamma Mia!*, which was adapted for the screen by Catherine Johnson from her book for the theatre production.

Table 12 lists the top 20 grossing films worldwide released between 2001 and 2018 which are based on UK story material.

Table 12 Top 20 grossing films worldwide based on stories and characters created by UK writers, 2001-2018

Rank	Title	Year	Gross box office (US$ million)	Country of origin	UK source material
1	Harry Potter and the Deathly Hallows: Part 2	2011	1,342	UK/USA	Novel by JK Rowling
2	The Lord of the Rings: The Return of the King	2003	1,130	USA/NZ	Novel by JRR Tolkien
3	Skyfall	2012	1,109	UK/USA	Based on novels by Ian Fleming
4	Alice in Wonderland (2010)	2010	1,025	USA	Novel by Lewis Carroll
5	The Hobbit: An Unexpected Journey	2012	1,021	USA/NZ	Novel by JRR Tolkien
6	Harry Potter and the Philosopher's Stone	2001	975	UK/USA	Novel by JK Rowling
7	The Jungle Book (2016)	2016	967	UK/USA	Novel by Rudyard Kipling
8	The Hobbit: The Desolation of Smaug	2013	961	USA/NZ	Novel by JRR Tolkien
9	Harry Potter and the Deathly Hallows: Part 1	2010	961	UK/USA	Novel by JK Rowling
10	The Hobbit: The Battle of the Five Armies	2014	956	USA/NZ	Novel by JRR Tolkien
11	Harry Potter and the Order of the Phoenix	2007	940	UK/USA	Novel by JK Rowling
12	Harry Potter and the Half-Blood Prince	2009	934	UK/USA	Novel by JK Rowling
13	The Lord of the Rings: The Two Towers	2002	929	USA/NZ	Novel by JRR Tolkien
14	Harry Potter and the Goblet of Fire	2005	897	UK/USA	Novel by JK Rowling
15	SPECTRE	2015	881	UK/USA	Based on novels by Ian Fleming
16	Harry Potter and the Chamber of Secrets	2002	878	UK/USA	Novel by JK Rowling
17	The Lord of the Rings: The Fellowship of the Ring	2001	874	USA/NZ	Novel by JRR Tolkien
18	Inception	2010	828	UK/USA	Original screenplay by Christopher Nolan
19	Fantastic Beasts and Where to Find Them	2016	813	UK/USA	Based on a book by JK Rowling
20	Harry Potter and the Prisoner of Azkaban	2004	797	UK/USA	Novel by JK Rowling

Source: BFI, comScore

UK ACTORS

The global prominence of UK acting talent is reflected in Table 13 which shows that almost 70% of the top 200 films at the worldwide box office since 2001 have featured British actors in either lead/title roles or in the supporting cast. In total, these films generated almost 72% of the overall gross for the top 200 titles.

Table 13 UK acting talent in the top 200 grossing films worldwide, 2001-2018

Films that have…	Number of films	Gross box office ($US billion)	% of total gross for top 200 films
UK lead actor(s) only	17	13.0	8.4
UK supporting actor(s) only	86	68.5	43.9
UK lead and supporting actor(s)	36	30.4	19.5
Total	**139**	**112.0**	**71.7**

Source: BFI, comScore

Note: Includes live action and animated titles.

UK DIRECTORS

Twenty-five of the 200 highest grossing films at the global box office between 2001 and 2018 were helmed by British directors (Table 14). David Yates remains the most commercially successful British director in recent years, with total top 200 box office takings of $5.6 billion from the last four films in the Harry Potter series and the two Fantastic Beasts spin-offs. (*Fantastic Beasts: The Crimes of Grindelwald* is the only 2018 release in the list.) Christopher Nolan is in second place with earnings of $4.1 billion from five top 200 titles: two Batman films, *Inception, Interstellar* and *Dunkirk*, all of which he wrote or co-wrote as well as directed.

Two women feature amongst the 13 British directors of top 200 films: Phyllida Lloyd is in 10th place with a worldwide gross of $606 million for *Mamma Mia!* and Sam Taylor-Johnson is 11th with a gross of $571 million for *Fifty Shades of Grey*. In total, the 25 feature films in the list generated a box office gross of $19 billion.

Table 14 UK directors of the top 200 grossing films worldwide, 2001-2018

Rank	Director	Film	Total gross box office (US$ million)
1	David Yates	Harry Potter and the Deathly Hallows: Part 2	1,342
		Harry Potter and the Deathly Hallows: Part 1	961
		Harry Potter and the Order of the Phoenix	940
		Harry Potter and the Half-Blood Prince	934
		Fantastic Beasts and Where to Find Them	813
		Fantastic Beasts: The Crimes of Grindelwald	654
		Total (6)	*5,642*
2	Christopher Nolan	The Dark Knight Rises	1,085
		The Dark Knight	1,006
		Inception	828
		Interstellar	674
		Dunkirk	527
		Total (5)	*4,120*
3	Sam Mendes	Skyfall	1,109
		SPECTRE	881
		Total (2)	*1,990*
4	Gareth Edwards	Rogue One: A Star Wars Story	1,056
		Godzilla (2014)	528
		Total (2)	*1,584*
5	Guy Ritchie	Sherlock Holmes: A Game of Shadows	545
		Sherlock Holmes	525
		Total (2)	*1,071*
6	Mike Newell	Harry Potter and the Goblet of Fire	897
7	David Slade	The Twilight Saga: Eclipse	699
8	Garth Jennings	Sing	632
9	Ridley Scott	The Martian	631
10	Phyllida Lloyd	Mamma Mia!	606
11	Sam Taylor-Johnson	Fifty Shades of Grey	571
12	Kenneth Branagh	Cinderella (2015)	544
13	Rupert Wyatt	Rise of the Planet of the Apes	483

Source: BFI, comScore

Image: *Bohemian Rhapsody* courtesy of Twentieth Century Fox Film Corporation, Monarchy Enterprises S.a.r.l. and Regency Entertainment (USA) Inc. All rights reserved

INTERNATIONAL AWARDS FOR UK FILMS AND TALENT

Awards and nominations are important for raising the critical reputation and international profile of UK film. This section presents the prizes won by British talent and UK films at the major international film festivals and awards ceremonies in the 2018/19 awards cycle. (For the purposes of this analysis we consider the awards cycle to start with the Sundance Film Festival in January of a particular year and end with the BAFTA Film Awards and Academy Awards® of the following year.) The awards considered here were presented at the Sundance, Berlin, Cannes, Venice and Toronto festivals of 2018 and the BAFTA Film Award and Academy Award® ceremonies which took place in 2019.

However, Table 15 also shows the number of awards won in calendar years 2001 to 2018, in order to provide a comparison with previous years. UK films and British individuals won 28 awards in calendar year 2018, and 25 awards during the 2018/19 awards cycle. The 28 awards won in calendar year 2018 represent 14% of the awards available to UK films and British talent (awards specific to foreign nationals or films, e.g. the Toronto International Film Festival's award for Best Canadian Film, are not included in the present analysis).

Of the 28 awards presented to British films and talent in calendar year 2018, a total of 20 were won or shared by British women or won by British films made by women, including Lucy Sibbick, joint winner of both a BAFTA and Oscar® for Makeup and Hair on *Darkest Hour*, and Rachel Shenton, joint winner of an Oscar for Best Short Film for *The Silent Child*. (For full details of UK BAFTA and Academy Award® winners in 2018, see the 2018 Statistical Yearbook.)

Table 15 Numbers of UK award winners, 2001-2018/19

Year	Number of UK award winners	UK share %
2001	25	14
2002	24	15
2003	22	13
2004	22	13
2005	23	14
2006	25	14
2007	32	15
2008	32	15
2009	36	17
2010	24	12
2011	30	15
2012	23	14
2013	24	13
2014	28	19
2015	24	16
2016	29	15
2017	22	12
2018	28	14
Total (to end of 2018)	**473**	**14**
2017/18 awards cycle	*33*	*18*
2018/19 awards cycle	*25*	*13*

Source: BFI

As Table 16 shows, British films and filmmakers won prizes at three of the five major festivals in 2018. There were two awards at the Sundance Film Festival, two at the Cannes Film Festival and three at the Venice Film Festival (including two prizes for the 2018/19 award season's most lauded UK film, *The Favourite*). Although not appearing in the table below, British producer Bill Kenwright also celebrated a win at Sundance as co-producer of the US feature film *Burden* which won the Audience Award (US cinema dramatic). There were also wins for two non-UK nationals associated with UK films at the 2018 festivals: at Berlin, the American filmmaker Wes Anderson won the top directing prize for *Isle of Dogs*, while at Cannes, Polish-born director Pawel Pawlikowski was named best director for *Cold War*.

The Favourite was the big winner at the BAFTA Film Awards in 2019, garnering seven prizes from 12 nominations, including awards for Outstanding British Film, Leading Actress (Olivia Colman), Supporting Actress (Rachel Weisz) and Original Screenplay (Deborah Davis, Tony McNamara). The historical drama also provided first BAFTA wins for makeup and hair designer Nadia Stacey and production design team Fiona Crombie and Alice Felton, and a third BAFTA award for costume designer Sandy Powell. *Bohemian Rhapsody*, which had seven nominations, won in two categories: Leading Actor (Rami Malek) and Sound. (The former is not listed below as the winner is not a UK national.)

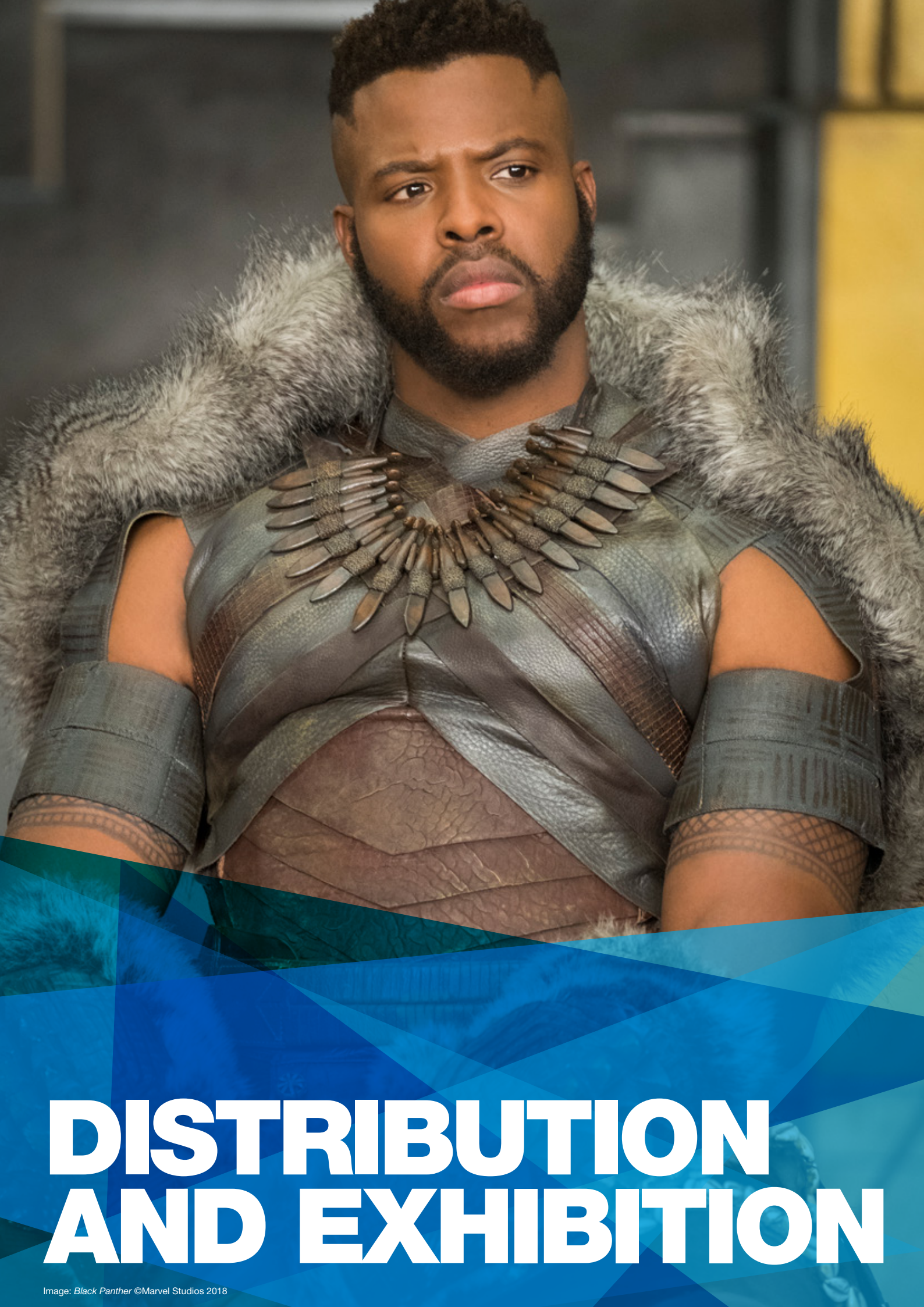
Both Olivia Colman and the sound team behind *Bohemian Rhapsody* repeated their BAFTA success at the Academy Awards®, winning trophies for Lead Actress, Sound Mixing and Sound Editing. Nina Hartstone, one of the winners of the Sound Editing Oscar® was the first-ever European woman to have been nominated in this category. Another notable British winner was Paul Lambert who followed his 2018 Visual Effects Oscar® win (for *Blade Runner 2049*) with the visual effects prize for his work on the Neil Armstrong biopic *First Man*. The 2019 Visual Effects Oscar® was shared with a team that included fellow Brit and first-time Oscar® winner Tristan Myles.

Overall British films and filmmakers won 13 BAFTAs and five Oscars® during the 2018/19 awards cycle, compared with 15 BAFTAs and six Oscars® in the 2017/18 cycle.

Table 16 Awards won by UK films and British talent, 2018/19

Award ceremony festival	Award	Recipient	Title
Sundance Film Festival 18-28 January 2018	Special Jury Prize - World Cinema: Documentary	Film: award presented to Stephen Loveridge and M.I.A.	Matangi/ Maya/M.I.A.
	Sundance Institute/ NHK Award	Remi Weekes	His House
Cannes Film Festival 8-19 May 2018	L'Œil d'or (Golden Eye, the documentary prize) - Special Mention	Mark Cousins	The Eyes of Orson Welles
	Chopard Trophy	Joe Alwyn	-
Venice Film Festival 29 August - 8 September 2018	Best Actress (Volpi Cup)	Olivia Colman	The Favourite
	Silver Lion Grand Jury Prize	Film: award presented to Yorgos Lanthimos	The Favourite
	Golden Lion for Lifetime Achievement	Vanessa Redgrave	-
BAFTA Film Awards 10 February 2019	Outstanding British Contribution to Cinema	Stephen Woolley and Elizabeth Karlsen	-
	Original Screenplay	Deborah Davis, Tony McNamara	The Favourite
	Leading Actress	Olivia Colman	The Favourite
	Supporting Actress	Rachel Weisz	The Favourite
	Costume Design	Sandy Powell	The Favourite
	Makeup and Hair	Nadia Stacey	The Favourite
	Sound	John Casali, Tim Cavagin, Nina Hartstone, Paul Massey and John Warhurst	Bohemian Rhapsody
	Outstanding British Film	Film: award presented to Yorgos Lanthimos, Ceci Dempsey, Ed Guiney, Lee Magiday, Deborah Davis, Tony McNamara	The Favourite
	Outstanding Debut by a British Writer, Director or Producer	Michael Pearce (Writer/Director), Lauren Dark (Producer)	Beast
	British Short Animation	Film: award presented to Jonathan Hodgson and Richard Van Den Boom	Roughhouse
	EE Rising Star	Letitia Wright	-
	Production Design	Fiona Crombie and Alice Felton	The Favourite
	British Short Film	Film: award presented to Alex Lockwood	73 Cows
Academy Awards® 25 February 2019	Lead Actress	Olivia Colman	The Favourite
	Sound Mixing	John Casali, Tim Cavagin and Paul Massey	Bohemian Rhapsody
	Sound Editing	Nina Hartstone and John Warhurst	Bohemian Rhapsody
	Visual Effects	Paul Lambert and Tristan Myles (with Ian Hunter and J.D. Schwalm)	First Man
	Original Song	Mark Ronson (with Lady Gaga, Anthony Rossomando and Andrew Wyatt)	"Shallow" from A Star Is Born

Source: BFI



DISTRIBUTION AND EXHIBITION

Image: *Black Panther* ©Marvel Studios 2018

Facts in focus

DISTRIBUTOR REVENUES

TOP 10 **distributors** had **95.5%** share of the theatrical market in the UK and Republic of Ireland in 2018 with revenues of **£1.3 billion**

TOP EARNING DISTRIBUTORS

Walt Disney: Overall top earner with theatrical revenues of **£326m**

Universal: Top earning distributor of UK independent films with theatrical revenues of **£46m** from these titles and total revenues of **£269m**

AVERAGE AD SPEND FOR UK FILMS IN 2018

UK STUDIO BACKED £2.1m

UK INDEPENDENT £0.2m

AVERAGE COMMERCIAL CINEMA TICKET PRICE

2017 £7.49

2018 £7.21

UK CINEMA SITE PROVISION

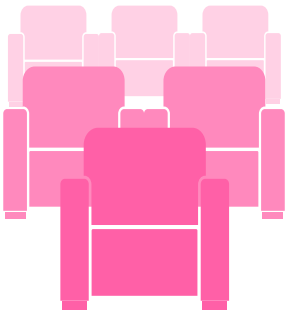
2017: **774**

4,264 screens

2018: **775**

4,340 screens

WIDTH OF RELEASE IN 2018



64% of films (503) released at fewer than 50 sites

7% of films (58) released at 500 sites or more

CINEMA OWNERSHIP IN 2018

3 LARGEST EXHIBITORS OWNED

38% of all UK cinemas

63% of UK screens

SCREEN DENSITY IN THE UK

2017
6.5 SCREENS PER 100,000 PEOPLE

2018
6.6 SCREENS PER 100,000 PEOPLE

Distribution and exhibition

DISTRIBUTORS

The top 10 feature film distributors had a 95.5% share of the market in 2018 from the release of 251 titles (26% of all films on release). The same 10 distributors achieved a market share of 96% in 2017 from 284 releases (30% of all releases). A further 128 film distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2018, compared with 117 companies outside the top 10 in 2017. These distributors handled a total of 715 titles (74% of all releases) but generated only 4.5% of the total box office.

Table 1 shows box office takings by distributor for all films on release during 2018, and hence includes revenues for titles which were released in 2017 but remained in cinemas into 2018. The top earning distributor was Walt Disney, which handled seven of the top 20 releases of 2018 including *Avengers: Infinity War*, *Incredibles 2* and *Black Panther*, as well as *Star Wars: The Last Jedi*, a December 2017 release which continued to generate significant box office in 2018. (The 24% box office share generated by Walt Disney in 2018 is the highest share achieved by a single distributor since our records began.) The second highest earning distributor was Universal which released four of 2018's top 20 titles including *Mamma Mia! Here We Go Again*, *Jurassic World: Fallen Kingdom* and *The Grinch*.

The top earning independent distributor in 2018 was eOne Films, whose highest grossing titles were *The Post*, *The House With a Clock in Its Walls* and *Finding Your Feet*.

Table 1 Distributor share of box office, UK and Republic of Ireland, 2018

Distributor	Market share (%)	Films on release in 2018	Box office gross (£ million)
Walt Disney	23.6	24	325.6
Universal	19.5	40	268.5
20th Century Fox	14.5	28	199.3
Warner Bros	13.9	31	191.4
Sony	10.7	33	146.8
Paramount	4.8	12	66.0
eOne Films	3.2	22	43.9
StudioCanal	2.8	31	38.4
Lionsgate	1.5	21	21.2
Entertainment	1.1	9	15.6
Top 10 total	95.5	251	1,316.8
Others (128 distributors)	4.5	715	61.4
Total	**100.0**	**966**	**2,695.0**

Source: comScore

Notes:

The total number of films on release differs from Table 5 as it includes all films shown in cinemas in 2018, including titles first released in 2017.

Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2018 to 31 December 2018.

Figures may not sum to sub-totals/totals due to rounding.

The distributors' market shares fluctuate from year to year (Table 2). In 2018, Walt Disney was the UK's leading distributor for the third consecutive year (and the third time in the 10-year period covered in the table). The second highest earning distributor of 2018, Universal, has headed the top 10 chart on one other occasion over the period, whilst third placed 20th Century Fox has topped the chart twice since 2009.

The same distributors consistently appear in the top 10. In all years up to 2012, the major US studios took the leading places in the list, with only six different independent distributors appearing in the top 10 over the period. However, between 2013 and 2017, a number of the independent distributors ranked higher than one or more of the studio distributors. In 2018, the top six places were taken by the major US studios.

Throughout the period, the share of box office generated by distributors outside the top 10 has ranged from 3.7% in 2014 to 7.8% in 2009; the share in 2018 was 4.5%.

Table 2 Distributor market share as percentage of box office gross, 2009-2018 (ranked by 2018 market share)

Distributor	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Walt Disney	12.4	14.0	8.7	10.2	15.2	10.1	20.0	23.2	19.7	23.6
Universal	10.5	10.2	11.8	10.7	15.1	11.2	21.6	14.0	16.0	19.5
20th Century Fox	16.6	15.9	12.1	16.1	13.1	21.8	14.9	15.7	15.1	14.5
Warner Bros	11.2	18.3	18.2	12.9	17.2	15.9	9.0	15.6	16.6	13.9
Sony	11.3	6.9	7.2	18.0	8.7	6.2	11.8	6.6	10.3	10.7
Paramount	10.8	14.8	16.3	7.7	7.8	5.8	4.0	5.4	3.7	4.8
eOne Films	4.9	5.5	5.1	6.7	9.0	8.0	3.9	8.4	2.5	3.2
Optimum/StudioCanal[1]	-	2.2	3.8	-	2.8	6.7	4.7	1.5	4.2	2.8
Lionsgate	2.9	3.5	-	5.7	4.7	5.5	4.0	4.0	6.3	1.5
Entertainment	8.6	2.5	6.7	3.1	1.9	5.2	1.6	1.5	1.7	1.1
Momentum[2]	-	-	4.6	4.3	-	-	-	-	-	-
Pathé	2.9	-	-	-	-	-	-	-	-	-
Top 10 total[3]	92.2	93.7	94.4	95.4	95.5	96.3	95.5	95.9	96.1	95.5
Others	7.8	6.3	5.6	4.6	4.5	3.7	4.5	4.1	3.9	4.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

Notes:

[1] Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

[2] Momentum was taken over by eOne Films in January 2014.

[3] Top 10 total refers to the top 10 distributors of that particular year.

Tables 3 and 4 show the top 10 distributors of foreign language films and independent UK titles released in the UK and Republic of Ireland in 2018. (In total, there were 787 film releases in 2018.)

Foreign language films accounted for 43% of releases at the UK box office in 2018, grossing a total of £30 million (2% of overall box office). The high volume of foreign language releases is reflected by the number of companies in the UK handling such titles: 78 different distributors released non-English language films in the year. As Table 3 shows, the top 10 distributors associated with these films released 81 titles (24.5% of the 331 foreign language films released during the year). These films generated £17.3 million which equates to 57% of the total box office for foreign language films. Hindi was the most popular non-English language for releases both in terms of numbers and box office revenues, with 53 titles taking £12.3 million. Polish was the next most popular foreign language in terms of box office, grossing £4.6 million (from 15 releases), while French language films accounted for the second highest number of releases with 36 titles (which grossed £1.8 million).

Indian film distributor Yash Raj had the largest share of the foreign language box office overall with earnings of £3.2 million from seven Hindi language releases, including *Race 3* and *Thugs of Hindostan*, while Murugan Talkies released the highest number of non-English language titles (23). The distributor of non-Indian foreign language films with the highest box office earnings was Curzon Artificial Eye (£2.9 million), whose titles included *Cold War* (in Polish) and *A Fantastic Woman* (in Spanish). Polish film specialist Phoenix was the third highest earning distributor of non-English language films in 2018, with takings of £2.5 million from five releases, which included *Clergy*, the highest grossing non-Hindi foreign language film of the year, and *Women of Mafia*. (For more on the top earning foreign language films of 2018, see the Film at the cinema chapter.)

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2018 (ranked by box office gross)

Distributor	Number of foreign language films released in 2018	Average widest point of release	Box office gross (£ million)
Yash Raj	7	90	3.2
Curzon Artificial Eye	20	18	2.9
Phoenix	5	216	2.5
Paramount	1	137	2.2
20th Century Fox	2	83	1.8
Zee Studios	10	40	1.6
Ayngaran	9	40	1.2
Murugan Talkies	23	10	0.9
Thunderbird	4	27	0.9

Source: comScore, BFI RSU analysis

Image: *Early Man* ©2017 StudioCanal S.A.S and the British Film Institute

In total, 71 distributors released independent UK films in 2018, generating a combined box office gross of £171 million (13% of overall box office) from 182 releases. The 52 films released by the top 10 distributors of independent UK titles accounted for £157 million, which equates to 91% of the total box office generated by these films (Table 4). Universal had the largest share of box office for UK independent film releases with earnings of £46 million from five titles, which included the category's top two earning films, *Darkest Hour* and *Johnny English Strikes Again*, while StudioCanal had the highest number of releases (10), which included titles such as *Early Man* and *King of Thieves*.

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2018 (ranked by box office gross)

Distributor	Number of UK independent films released in 2018	Average widest point of release	Box office gross (£ million)
Universal	5	389	45.6
20th Century Fox	6	431	35.1
StudioCanal	10	263	30.4
eOne Films	8	247	17.8
Lionsgate	8	186	9.0
Walt Disney	2	544	7.0
Sony	2	433	3.9
Entertainment	3	181	3.7
Curzon Artificial Eye	6	42	2.7
STX Entertainment	2	313	2.2

Source: comScore, BFI RSU analysis

Image: *Clergy* ©2018 Bartosz Mrozowski. Courtesy of Phoenix Productions

WIDTH OF RELEASE

Table 5 shows the numbers and percentages of films released in the UK and Republic of Ireland from 2011 to 2018 by widest point of release. For the majority of the period, around 75% of all films were released at less than 100 sites, while two thirds of films were released at less than 50 sites. Since 2011, there has been a downward trend in the share of films released at 100-500 sites, with the sharpest fall being seen in films released at 300-399 sites, which decreased from 7.9% in 2011 to 2.8% in 2018. At the same time, there has been an increase in the share of films released at 500 sites or over, which rose from 3.4% in 2011 to 7.4% in 2018.

Table 5 Numbers and percentages of releases by widest point of release, 2011-2018

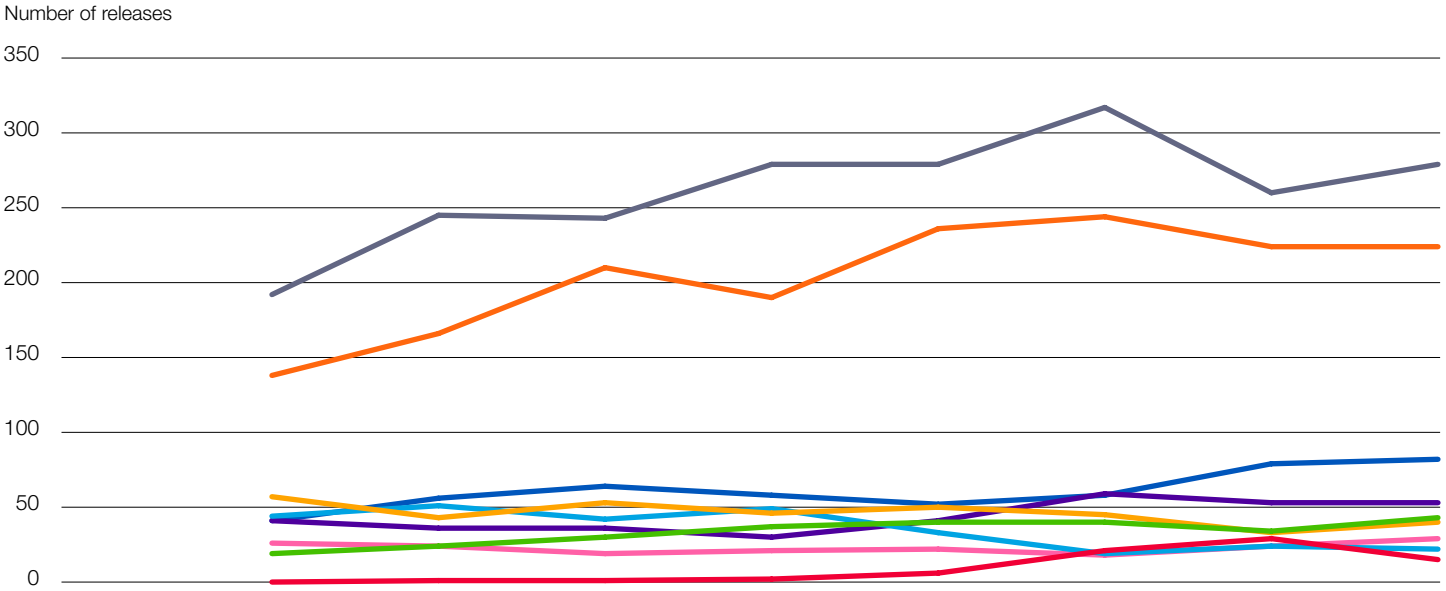
	2011		2012		2013		2014		2015		2016		2017		2018	
Sites at widest point of release	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases
>=600	0	-	1	0.2	1	0.1	2	0.3	6	0.8	21	2.6	29	3.8	15	1.9
500 - 600	19	3.4	24	3.7	30	4.3	37	5.2	40	5.3	40	4.9	34	4.5	43	5.5
400 - 499	57	10.2	43	6.6	53	7.6	46	6.5	50	6.6	45	5.5	33	4.3	40	5.1
300 - 399	44	7.9	51	7.9	42	6.0	49	6.9	33	4.3	19	2.3	24	3.2	22	2.8
200 - 299	26	4.7	24	3.7	19	2.7	21	2.9	22	2.9	18	2.2	24	3.2	29	3.7
100 - 199	41	7.3	36	5.6	36	5.2	30	4.2	41	5.4	59	7.2	53	7.0	53	6.7
50 - 99	41	7.3	56	8.7	64	9.2	58	8.1	52	6.9	58	7.1	79	10.4	82	10.4
10 - 49	138	24.7	166	25.7	210	30.1	190	26.7	236	31.1	244	29.7	224	29.5	224	28.5
<10	192	34.4	245	37.9	243	34.8	279	39.2	279	36.8	317	38.6	260	34.2	279	35.5
Total	**558**	**100.0**	**647**	**100.0**	**698**	**100.0**	**712**	**100.0**	**759**	**100.0**	**821**	**100.0**	**760**	**100.0**	**787**	**100.0**

Source: comScore, BFI RSU analysis

Note: Percentages may not sum to totals due to rounding.

As Figure 1 shows, between 2011 and 2018 more films were shown at fewer than 50 sites at their widest point of release than at any of the higher release width bands. During the period, the number of films released at 300-399 sites and 400-499 sites has shown a gradual decrease, whilst the number of films released at all other release width bands has increased. It is interesting to note the increase in the number of films released at 500 or more sites, which grew from 19 in 2011 to 58 in 2018.

Figure 1 Number of releases by widest point of release, 2011-2018



	2011	2012	2013	2014	2015	2016	2017	2018
600+	0	1	1	2	6	21	29	15
500-600	19	24	30	37	40	40	34	43
400-499	57	43	53	46	50	45	33	40
300-399	44	51	42	49	33	19	24	22
200-299	26	24	19	21	22	18	24	29
100-199	41	36	36	30	41	59	53	53
50-99	41	56	64	58	52	58	79	82
10-49	138	166	210	190	236	244	224	224
<10	192	245	243	279	279	317	260	279

Source: comScore, BFI RSU analysis

WEEKEND BOX OFFICE

In 2018, 59% of box office revenue was taken at weekends (Friday to Sunday), the same share as in 2017. As Table 6 shows, the share of box office takings by day has been broadly consistent between 2009 and 2018, with the exception of the middle of the working week, which was boosted for most of the period by the 'Orange/EE Wednesdays' promotion. Since the end of this promotion in February 2015, the box office share has been more evenly distributed across weekdays, although the current 'Meerkat Movies' promotion, which offers two-for-one tickets on Tuesdays and Wednesdays, is likely to be responsible for some of the recent increase in Tuesday attendances. (In June 2018, the company behind the promotion announced that, since the launch of the scheme, there had been over 10 million redemptions of two-for-one tickets.)

Table 6 Box office percentage share by weekday/weekend, 2009-2018

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Friday	16.4	16.0	16.6	16.4	15.8	15.3	15.3	16.1	15.7	15.5
Saturday	24.0	24.1	23.8	24.1	24.9	25.2	23.9	24.6	24.7	24.1
Sunday	17.8	18.5	17.6	17.6	18.2	18.8	18.8	18.3	18.9	19.1
Weekend	**58.2**	**58.6**	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**	**58.7**
Monday	9.2	9.5	9.2	9.3	8.9	9.1	9.5	9.7	8.7	9.6
Tuesday	9.5	9.3	9.1	9.3	9.4	9.4	10.6	10.4	10.3	10.0
Wednesday	13.7	13.2	13.9	13.4	12.6	12.4	10.8	10.9	11.3	11.2
Thursday	9.5	9.3	9.8	9.8	10.2	9.8	10.9	10.1	10.6	10.6
Weekday	**41.8**	**41.4**	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**	**41.3**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

Note: Percentages may not sum to weekend/weekday sub-totals due to rounding.

Image: *Incredibles 2* ©2018 Disney•Pixar. All Rights Reserved

Table 7 shows the opening weekend box office as a share of total theatrical revenue by box office band between 2009 and 2018. In 2018, 28% of the overall box office take was generated by opening weekends, the joint third lowest share of the 10-year period. The table illustrates that the highest earning films generally take the lowest percentage of their box office in the opening weekend. In 2018, three of the year's top five earning films took less than 20% of their total grosses on their opening weekends: *Mamma Mia! Here We Go Again* earned 15% of its final box office, *Incredibles 2* earned 17% (to 21 February 2019) and *Bohemian Rhapsody* earned 18% (to 21 February 2019). For many films, however, opening weekend earnings represent a significant proportion of their final theatrical gross. In 2018, *Robin Hood* earned 48% of its final gross on its opening weekend, *The Festival* earned 41% and *Widows* earned 38%.

Table 7 Opening weekend as percentage of total box office, by box office band, 2009-2018

	% of total in opening weekend									
Range of box office (£ million)	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**
>30	18.8	27.4	29.4	27.0	24.0	27.1	32.2	27.2	26.5	26.9
20 - 30	23.0	35.8	22.6	22.4	30.9	21.9	25.9	28.0	33.3	24.7
10 - 19.9	32.2	26.1	27.6	24.6	27.6	30.9	25.6	29.1	28.5	25.3
5 - 9.9	26.1	26.7	26.2	26.1	28.4	25.9	28.7	32.2	33.2	29.5
1 - 4.9	30.3	30.4	32.2	31.8	32.1	30.3	32.3	33.1	32.1	34.5
0.2 - 0.9	35.5	31.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1	35.6
<0.2	36.5	34.8	38.5	37.8	38.3	40.0	39.6	39.6	41.4	41.6
All films	**26.1**	**28.6**	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**	**27.9**

Source: comScore, BFI RSU analysis

Note: Opening weekends include preview figures. For films with a limited initial opening, the wider release figure is included in the analysis.

Image: *Mamma Mia! Here We Go Again* ©2017 Universal Studios. Courtesy of Universal Studios Licensing LLC

RELEASE COSTS

The opening weekend is recognised as being crucial to the success of a film, both in cinemas and on subsequent release platforms. A good opening weekend, for example, may encourage exhibitors to continue to screen a film, and is likely to have a positive impact on the rest of the value chain, which is particularly important for independent films which do not have the backing of the major studios. Distributors invest heavily in advertising across all media (outdoor posters, print, television, radio and online) in order to raise a film's profile with potential audiences.

The estimated total advertising spend by distributors in 2018 was £197.5 million, down 14% from £229.5 million in 2017 (Table 8). However, there were 787 film releases in the UK and Republic of Ireland in 2018 compared with 760 in 2017, so the average advertising spend per film decreased by 17%, from £0.3 million to £0.25 million.

Advertising spend was down across all traditional media in 2018, with the biggest decreases occurring in press and radio. At £10.8 million, the spend on press advertising was down 23% compared with 2017, and was the lowest value of the 10-year period covered in the table, while radio advertising spend (£8.7 million) was down 28% on 2017. Expenditure on television advertising, which consistently accounts for the greatest spend on traditional media platforms, was £79.2 million in 2018, a decrease of 2% compared with 2017. (The value of advertising spend on television in 2018 was the lowest since 2010.) The spend on outdoor advertising was £54.9 million, down 3% year-on-year, and the lowest total of the period.

The greatest decrease in value compared with 2017 was seen in internet advertising, the spend on which fell by 33%, from £65.5 million to £43.7 million. It should be noted, however, that the data for online advertising values only cover desktop/mobile display and pre-roll advertising; they do not include estimates for advertising on websites or social media platforms which require a log-in. Search advertising and pay-per-click are also not included. The value of internet advertising as reported in the table represents 22% of the total advertising spend for film in 2018. However, as the data for this category it not wholly comprehensive, we believe this share to be an underestimate. (Nielson is currently developing a new methodology to enhance data gathering in this area.)

It is interesting to note that the world's largest advertising media company, Group M[1], estimates that online advertising will account for 61% of the total measured advertising market in 2019.

Approximately £74 million was spent on advertising British films in 2018, up from £64 million in 2017, although more UK films were released in 2018 than in 2017 (197 compared to 159). The increase is mainly due to a greater spend on UK independent films, which rose from £26 million in 2017 (an average of £186,000 per film) to £43 million in 2018 (an average of £236,000 per film). The total advertising spend associated with UK studio-backed features fell from £38 million in 2017 to £31 million in 2018. However, as there were fewer UK studio-backed film releases in 2018 (15) than in 2017 (20) the average spend per film increased from £1.9 million to £2.1 million.

Table 8 Estimated advertising spend 2009-2018 (£ million)

Medium	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
TV	74.3	76.0	90.8	89.1	89.2	101.0	102.2	93.3	81.1	79.2
Outdoor	57.0	61.0	69.1	67.2	71.2	64.2	60.5	52.8	56.5	54.9
Press	19.9	19.9	22.0	21.5	20.7	24.2	21.3	14.9	14.0	10.8
Radio	10.7	7.6	6.8	6.8	5.9	4.6	7.4	5.7	12.1	8.7
Sub-total	**161.9**	**163.5**	**188.7**	**188.1**	**187.8**	**194**	**191.4**	**166.7**	**163.7**	**153.6**
Internet*	6.4	6.1	8.5	4.0	2.5	1.1	0.7	46.4	65.5	43.7
Total	**168.3**	**170.6**	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**	**197.5**

Source: Nielsen Media Research

Notes:

Figures may not sum to totals due to rounding.

* The figures for 2014 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2008-2013, 2014- 2015 and 2016-2018.

[1] *Group M, 2019 Ad-Forecast Press Release:* December 2018

Using the information on advertising spend and estimating print costs, the total release costs for various release widths can be estimated. With the advent of digital projection, the 35mm print has largely been replaced by the Digital Cinema Package (DCP). In creating a DCP, distributors incur digital mastering and duplication costs and in many instances Virtual Print Fees (the fee for booking a film that contributes to the cost of an exhibitor's conversion from analogue projection to digital projection). In the absence of any empirical data on the current average cost of a DCP, we continued to use the same estimate as when all prints were analogue, which was typically £1,000 per print. So, taking this estimate and adding it to the Nielsen Media Research advertising spend estimate (to which we add +20% for additional public relations campaigns, publicity and premiere costs), the average release cost for different levels of theatrical release can be calculated.

The average cost of release for films shown at the widest number of cinemas (500+) in 2018 was £3.0 million, down 11% from £3.3 million in 2017. This downward trend in costs was seen in films in all release width categories with the exception of the three lowest bands. The average cost of release for films shown at 50-99 sites at their widest point of release was £190,000, an increase of 34% from £140,000 in 2017, while there was no change in the average cost of release for films in the two lowest bands.

Table 9 Estimated release cost by width of release for all films, 2009-2018

	Average release cost (£ million)									
Number of sites at widest point of release	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
500+*	3.40	2.65	3.14	3.13	3.04	2.94	2.87	3.21	3.34	2.97
400 - 499	2.05	2.09	2.17	1.99	2.04	2.04	1.59	1.91	1.82	1.59
300 - 399	1.32	1.24	1.38	1.28	1.15	1.21	1.30	1.01	1.09	1.07
200 - 299	0.84	0.77	0.82	0.83	0.76	0.76	0.72	0.69	0.63	0.54
100 - 199	0.51	0.33	0.31	0.36	0.30	0.35	0.25	0.27	0.41	0.28
50 - 99	0.21	0.20	0.16	0.12	0.13	0.18	0.12	0.12	0.14	0.19
10 - 49	0.06	0.04	0.05	0.04	0.03	0.05	0.03	0.03	0.04	0.04
<10	0.01	0.01	0.01	0.01	0.01	0.01	<0.01	<0.01	<0.01	<0.01

Source: Nielsen Media Research, comScore, BFI RSU analysis

Notes:

The print costs calculations assume current DCP/print costs are the same as for analogue distribution.

* We are not able to calculate release costs for 600+ locations for this edition of the Yearbook.

Table 10 shows the average cost of release by production budget for the 160 UK films released in 2018 for which budget information is available. The average cost of release increased with the size of the production budget, with the largest rise seen between films in the £5-£9.9 million budget range and those made for £10 million or over. However, the highest budget films are most likely to have the greatest promotional spend, in particular the large scale inward investment films backed by the major US studios which have considerable marketing budgets. The average release cost for studio-backed films in the top budget band was £3.2 million while the average release cost for independent films in this band was £1.7 million.

Table 10 Estimated release cost by budget for UK films, 2018

Budget (£ million)	Number of films	Average release cost (£ million)
10+	40	2.30
5 - 9.9	17	0.66
2 - 4.9	28	0.32
0.5 - 1.9	39	0.15
<0.5	36	0.02
All films	**160**	**0.74**

Source: Nielsen Media Research, BFI RSU analysis

See note to Table 9.

Image: *Finding Your Feet* courtesy of eOne Films

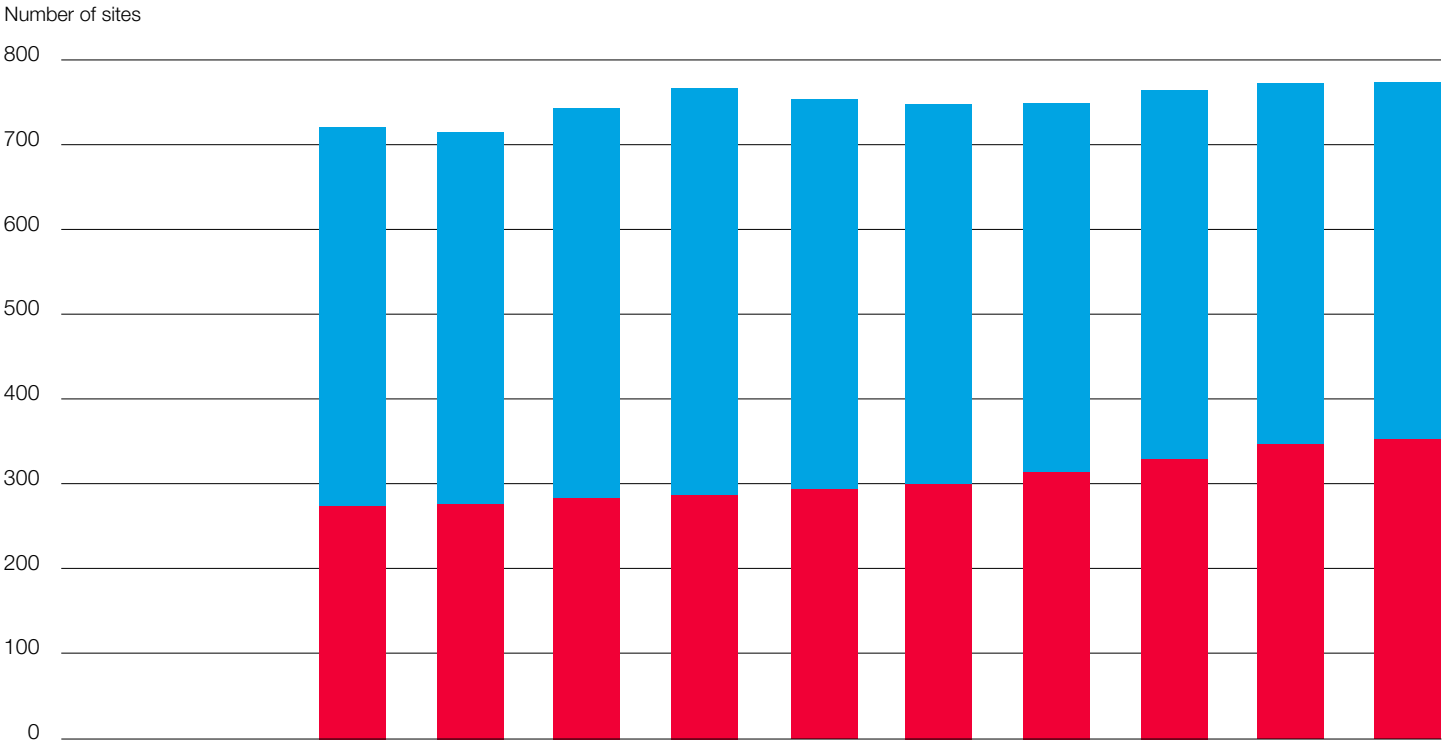
EXHIBITION

Cinemas provide the best environment for people to enjoy films as they are intended - on the big screen, with a large audience. The performance of the commercial exhibition sector is therefore an important indicator of the vitality of film culture.

UK CINEMA SITES

Figure 2 shows the number of cinema sites in the UK from 2009 to 2018. While the total number of sites has fluctuated over the period there has been an overall increase in provision; there were 775 cinemas in the UK in 2018 compared with 723 in 2009. However, the make-up of sites has changed over the decade. The number of traditional and mixed use sites (mixed use cinemas are used for film screenings only part of the time) has declined, falling from 448 cinemas in 2009 to 422 in 2018, while the number of purpose-built multiplex sites has grown, rising from 275 cinemas in 2009 to 353 in 2018. Multiplex cinemas made up 45.5% of all sites in 2018 compared with 38% in 2009.

Figure 2 UK cinema sites by type of site, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Multiplex	275	278	285	288	295	301	316	331	348	353
Traditional and mixed use	448	438	460	481	461	449	435	435	426	422
Total sites	723	716	745	769	756	750	751	766	774	775
% multiplex sites	38.0	38.8	38.3	37.5	39.0	40.1	42.1	43.2	45.0	45.5

Source: Dodona Research, BFI

Notes:

Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.

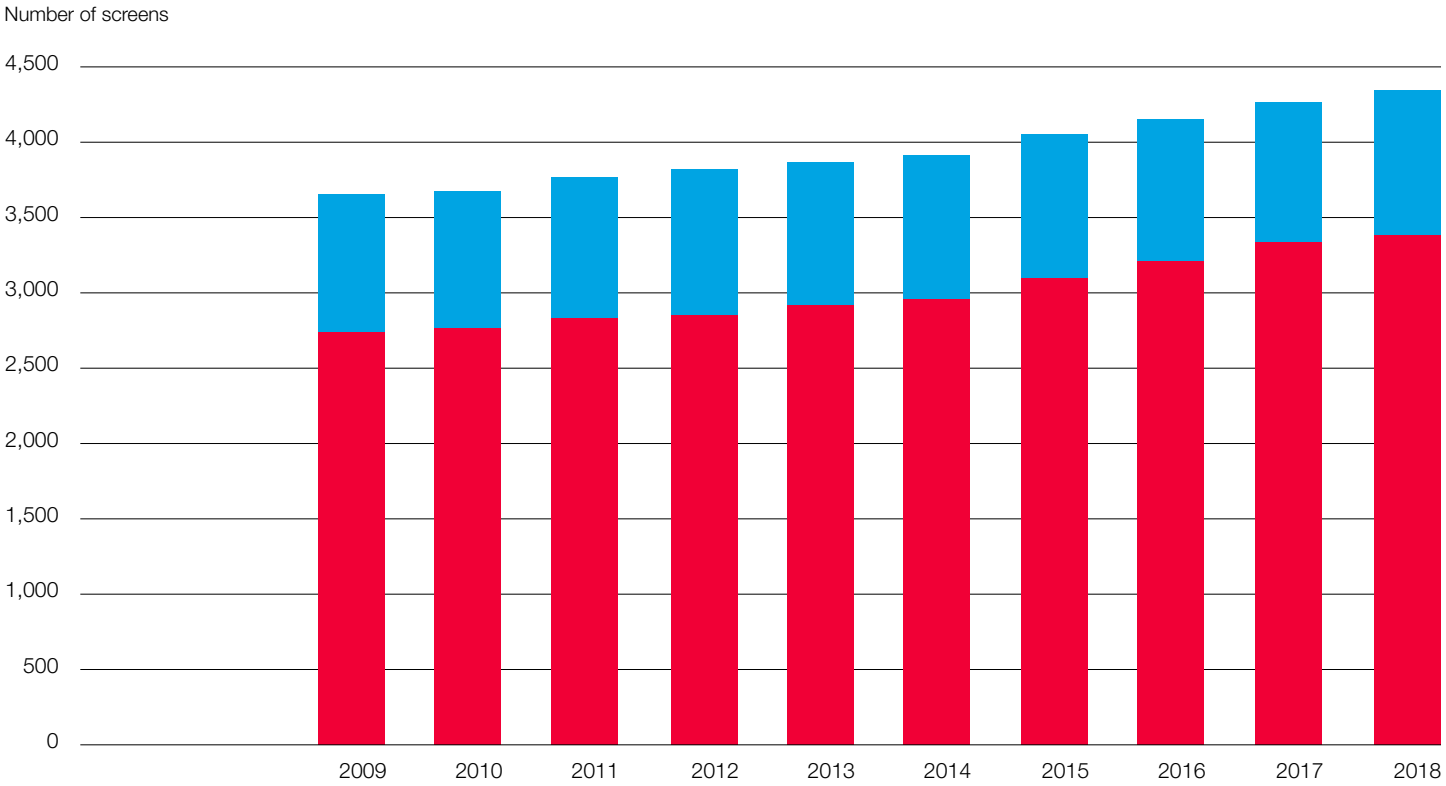
Mixed use cinemas are used for screenings only part of the time.

UK SCREENS

As Figure 3 shows, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) increased every year between 2009 and 2018. In 2018, the total number of screens stood at 4,340, a rise of 19% over the 10-year period.

This growth is primarily due to an increase in multiplex provision. Over the period, the UK gained 649 multiplex screens and 40 traditional or mixed use screens, while the share of multiplex screens increased from 75% to 78%. In 2018, there were 3,384 multiplex screens and 956 traditional or mixed use screens.

Figure 3 UK cinema screens by type of cinema, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Multiplex	2,735	2,767	2,833	2,851	2,915	2,959	3,096	3,209	3,334	3,384
Traditional and mixed use	916	904	934	966	952	950	950	941	930	956
Total screens	3.651	3,671	3,767	3,817	3,867	3,909	4,046	4,150	4,264	4,340
% multiplex screens	74.9	75.4	75.2	74.7	75.4	75.7	76.5	77.3	78.2	78.0

Source: Dodona Research, BFI

See notes to Figure 2.

SCREEN LOCATION

In 2018, 97.5% of all screens in the UK were located in urban or suburban locations. There were increases in the numbers of screens in all locations during the year compared with 2017, with the exception of suburban and rural areas, where numbers remained the same (Table 11). The largest increase numerically was seen in town and city centre cinemas, where there were 55 new screens, an increase in provision of 3% compared with 2017, whilst there were 17 new out of town screens (a 1% increase).

The table also shows that suburban and rural cinemas tend to have fewer screens on average than their urban counterparts, although town and city centre sites are also relatively small.

Table 11 Screens by location, 2009-2018

Location	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2017-2018	Average number of screens per site
Town/city centre	1,732	1,726	1,785	1,848	1,866	1,901	1,932	1,998	2,057	2,112	2.7	4.4
Out of town	1,297	1,311	1,335	1,310	1,328	1,335	1,413	1,422	1,457	1,474	1.2	10.2
Edge of centre	498	506	518	523	534	540	561	592	613	617	0.7	8.7
Suburban	27	28	28	27	26	25	26	29	29	29	-	1.9
Rural	97	100	101	109	113	108	114	109	108	108	-	1.6
Total	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**	**4,340**	**1.8**	**5.6**

Source: Dodona Research, BFI

Image: *A Fantastic Woman* courtesy of Curzon Artificial Eye

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION – INTERNATIONAL COMPARISONS

A standard way to gauge the level of cinema provision is by 'screen density', i.e. the number of screens per unit of population. According to IHS Markit, in 2018, screen density in the UK was 6.6 screens per 100,000 people, a slight increase from 6.5 in 2017. This level of access to screens falls short of that in other major film territories: USA (12.4), France (9.2), Australia (9.2), Spain (7.6) and Italy (6.7). Germany's screen density, at 5.3 screens per 100,000 people, is less than the UK's. (The world's fastest expanding territory, China, gained an additional 10,000 screens in 2018, which increased the number of screens per 100,000 people from 3.6 in 2017 to 4.2.)

Table 12 shows the level of admissions per head of population in a number of major film territories. The UK saw more admissions per head (2.7) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the selected territories, the USA (3.7) and Australia (3.6) had the highest admissions per head of population.

Table 12 Admissions per head of population in selected major film territories, 2009-2018 (ranked by 2018 admissions)

	USA	Australia	France	UK	Spain	Italy	Germany
2009	4.3	4.2	3.2	**2.8**	2.4	1.7	1.8
2010	4.0	4.2	3.3	**2.7**	2.2	1.8	1.6
2011	3.8	3.8	3.4	**2.7**	2.1	1.7	1.6
2012	3.9	3.8	3.2	**2.7**	2.0	1.5	1.7
2013	3.8	3.5	3.0	**2.6**	1.7	1.6	1.6
2014	3.6	3.3	3.2	**2.4**	1.9	1.5	1.5
2015	3.8	3.8	3.1	**2.6**	2.0	1.7	1.7
2016	3.8	3.8	3.2	**2.6**	2.2	1.8	1.5
2017	3.5	3.5	3.2	**2.6**	2.2	1.6	1.5
2018	3.7	3.6	3.0	**2.7**	2.1	1.4	1.3

Source: IHS Markit

Note: Data updated since publication of the 2018 Statistical Yearbook.

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION IN THE UK

This section looks at screen provision data for the UK based on two types of national/regional classification. The datasets are not directly comparable because of differences in the way the regions are defined; they do, however, shed light on different aspects of national and regional variation in screen provision.

The Cinema Advertising Association produces monthly admissions totals for each of the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Screen and admissions data for 2018 using these television regions are presented in Table 13.

The table shows that, although London had the greatest numbers of screens and sites, its screen density, at 7.1 screens per 100,000 people, was lower than that of Northern Ireland (11.9), Central Scotland (7.2) and the Midlands (7.2). The South and South East had the lowest screen density (5.2) of all the ISBA regions.

Table 13 also shows the wide variation in ticket prices across the country, with an average ticket in London being over 80% more expensive than in Northern Ireland, which had both the lowest average ticket price (£4.91) and the highest admissions per head of population (3.2) of any ISBA region. However, the correlation between low ticket prices and admissions does not relate to London which had the joint second highest admissions per head (3.0) but also substantially the highest average ticket price (£8.85).

The overall average cost of a cinema ticket in the UK in 2018 was £7.21, down from £7.49 in 2017. This is the first time the average ticket price has fallen since 2001. The UK Cinema Association, which represents the interests of the majority of UK cinema operators, partially attributed this drop to 'tactical discounting', which is seen in areas with strong local competition among exhibitors, as well as the impact of nationwide discount schemes such as Meerkat Movies, Cineworld Unlimited and Odeon Limitless.

Table 13 Screens and admissions by ISBA TV region, 2018 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (000)*	Admissions (million)	Admissions per screen	Admissions per head	Average ticket price (£)#
Northern Ireland	11.9	227	5.2	31	1,865	5.9	25,991	3.2	4.91
Central Scotland	7.2	273	6.3	41	3,786	11.3	41,392	3.0	7.04
Midlands	7.2	630	14.5	108	8,842	21.3	33,810	2.4	6.95
London	7.1	956	22.0	165	13,440	40.0	41,841	3.0	8.85
North West	7.0	497	11.5	71	7,053	17.5	35,211	2.5	6.61
Northern Scotland	6.3	82	1.9	20	1,324	3.4	41,463	2.6	6.54
South West	6.3	113	2.6	33	1,816	4.3	38,053	2.4	6.16
Wales and West	5.8	357	8.2	76	5,452	13.5	37,815	2.2	6.41
Yorkshire	5.7	362	8.3	60	6,386	15.3	42,265	2.4	6.71
North East	5.6	151	3.5	24	2,726	7.0	46,358	2.6	6.51
East of England	5.5	269	6.2	51	4,937	14.5	53,903	2.9	7.26
Border	5.3	32	0.7	15	623	1.1	34,375	1.8	6.79
South and South East	5.2	391	9.0	80	7,464	21.7	55,499	2.9	7.13
Total	**6.5**	**4,340**	**100.0**	**775**	**65,535**	**177.0**	**40,783**	**2.7**	**7.21**

Source: Dodona Research, BARB, Cinema Advertising Association (CAA), comScore, BFI

Notes:

* The population totals in Tables 13 and 14 are both 2018 estimates but differ slightly due to the difference in regional estimates.

Average ticket prices for the UK as a whole are calculated by dividing the UK-only box office gross by total UK admissions. In 2018, the box office gross was £1.282 billion and admissions were 177 million.

Figures may not sum to totals due to rounding.

Table 14 provides screen information for each of the English regions as defined by the UK government, plus Scotland, Wales and Northern Ireland. Northern Ireland had the highest number of screens per 100,000 people in 2018 (12.2), followed by the South East (7.4), and London (7.3). The East of England had the fewest screens per 100,000 people at 4.6 screens, followed by the East Midlands at 4.8 screens.

Table 14 Screens and population in the nations and regions, 2018 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (000)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	227	5.2	31	1,856	12.2	7.3
South East	666	15.3	133	9,004	7.4	5.0
London	650	15.0	111	8,897	7.3	5.9
North West	499	11.5	73	7,194	6.9	6.8
Scotland	364	8.4	66	5,364	6.8	5.5
South West	375	8.6	84	5,495	6.8	4.5
Wales	208	4.8	49	3,104	6.7	4.2
West Midlands	357	8.2	56	5,811	6.1	6.4
Yorkshire and The Humber	326	7.5	54	5,404	6.0	6.0
North East	138	3.2	19	2,616	5.3	7.3
East Midlands	229	5.3	43	4,723	4.8	5.3
East of England	284	6.5	52	6,144	4.6	5.5
Other	17	0.4	4	n/a	-	4.3
England sub-total	3,526	81.2	626	55,288	6.4	5.6
Total	**4,340**	**100.0**	**775**	**65,612**	**6.6**	**5.6**

Source: Dodona Research, Office for National Statistics (ONS), BFI

Notes:

* See note to Table 13.

Other includes the Channel Islands and the Isle of Man.

n/a = not available.

Figures/percentages may not sum to totals due to rounding.

Table 14 also shows that Northern Ireland and the North East had the highest averages for screens per site at 7.3 screens each. The South West and Wales along with 'other' (which includes the Channel Islands and the Isle of Man) had the lowest averages for screens per site showing a tendency towards smaller cinemas and, particularly for the South West and 'other', proportionally fewer multiplex screens (Table 15).

TYPE OF CINEMA SCREENS BY NATION AND REGION

Table 15 provides a snapshot of variations in multiplex provision around the UK. The South East had the largest number of multiplex screens (507) in 2018, followed by London (444) and the North West (441). Northern Ireland had the highest proportion of multiplex screens (92%) followed by the North East (91%) and North West (88%). In England the lowest concentration of multiplex screens was found in the South West (64%), which had a high number of traditional and mixed use screens (the third highest after London and the South East). London had the highest number of traditional and mixed use screens but its percentage of multiplex screens, at 68%, was the second lowest in England. Across the nations, after Northern Ireland, Wales had the highest proportion of multiplex screens (79%), followed by England and Scotland, both of which had 77%.

Table 15 Cinema screens by type by nation or region, 2018 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed use	Total
Northern Ireland	209	92.1	18	227
North East	126	91.3	12	138
North West	441	88.4	58	499
Yorkshire and The Humber	270	82.8	56	326
East Midlands	185	80.8	44	229
West Midlands	285	79.8	72	357
Wales	165	79.3	43	208
East of England	223	78.5	61	284
Scotland	280	76.9	84	364
South East	507	76.1	159	666
London	444	68.3	206	650
South West	239	63.7	136	375
Other	10	58.8	7	17
England sub-total	2,720	77.1	804	3,524
Total	**3,384**	**78.0**	**956**	**4,340**

Source: Dodona Research, BFI

Note: Other includes the Channel Islands and the Isle of Man.

MAINSTREAM, SPECIALISED AND ASIAN PROGRAMMING

Dodona Research categorises screens according to whether they show mostly mainstream, specialised (i.e. non-mainstream, including 'arthouse') or Asian films.

Table 16 shows that by far the majority of screens primarily show mainstream films. In 2018, 610 cinemas with 3,999 screens showed mostly mainstream films (79% of sites, 92% of screens). There were 162 sites with 335 screens showing mainly specialised films (21% of sites, 8% of screens) and three cinemas with six screens dedicated mainly to Asian films (0.4% of sites, 0.1% of screens).

Table 16 Sites and screens by programme, 2009-2018

Programme	Sites									
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Mainstream	551	550	571	589	586	583	595	604	609	610
Specialised	168	163	171	177	168	165	153	159	162	162
Asian*	4	3	3	3	2	2	3	3	3	3
Total	**723**	**716**	**745**	**769**	**756**	**750**	**751**	**766**	**774**	**775**
Programme	Screens									
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Mainstream	3,388	3,416	3,501	3,542	3,598	3,630	3,760	3,844	3,946	3,999
Specialised	253	248	259	268	265	275	280	300	312	335
Asian*	10	7	7	7	4	4	6	6	6	6
Total	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**	**4,340**

Source: Dodona Research, BFI

* Dodona Research renamed this category in 2018; it was previously titled 'South Asian'.

For the third consecutive year, the majority of specialised screens (53%) were found in chain cinemas rather than single, independent venues. This is partly a result of recent increases in the number of sites owned by boutique cinema chains such as Everyman, Light Cinemas and Picturehouse (itself owned by Cineworld) which have a broader programming focus than the larger exhibitors.

The pattern of programme type by location in 2018 is shown in Table 17. Screens showing mostly specialised films were located mainly in town or city centres, while those devoted to Asian films were found in town or city centres and suburban areas. The overall pattern remained similar to earlier years.

Table 17 Percentages of screens by location and programme, 2018

Location	Mainstream	Specialised	South Asian	Total
Town/city centre	45.2	89.3	66.7	48.7
Out of town	36.8	1.2	-	34.0
Edge of centre	15.3	1.2	-	14.2
Suburban	0.4	3.3	33.3	0.7
Rural	2.3	5.1	-	2.5

Source: Dodona Research, BFI

This geographical analysis is extended in Table 18, which shows the distribution of specialised screens around the UK. Screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 50% of the UK total in 2018. Yorkshire and The Humber and Scotland both had 28 specialised screens (8% of total screens) and the South West had 25 (7.5%). Northern Ireland (0.6%), the North East (1.8%) and Wales (2.7%) had the smallest shares of specialised screens.

The six screens showing Asian films were found in only three cinemas; two in London and the other in Leicester in the East Midlands.

Table 18 Geographical spread of specialised screens, 2018

Nation/region	Number of specialised screens	% of specialised screens
London	114	34.0
South East	55	16.4
Yorkshire and The Humber	28	8.4
Scotland	28	8.4
South West	25	7.5
East of England	21	6.3
North West	20	6.0
East Midlands	15	4.5
West Midlands	12	3.6
Wales	9	2.7
North East	6	1.8
Northern Ireland	2	0.6
Other	0	-
England sub-total	296	88.4
Total	**335**	**100.0**

Source: Dodona Research, BFI

Image: *Thugs of Hindostan* courtesy of Yash Raj Films

EXHIBITORS

The UK exhibition sector is made up of a small number of larger exhibitors which own and operate the majority of sites and screens and a large number of smaller companies with one or two sites and screens. At the end of 2018, the three largest exhibitors owned 38% of all UK cinemas and 63% of UK screens.

Table 19 shows that in 2018, 17 exhibitors owned or programmed 20 or more screens in the UK. (This has remained the same since 2015.) Collectively, these exhibitors have gained seven sites since 2017 and 69 screens. The largest increases were recorded by Everyman, which added four sites and 15 screens, and Light Cinemas, which added two sites and 12 screens. Three of the 17 exhibitors (Cineworld, Odeon and Reel Cinemas) had a net loss of sites but increased their number of screens.

Table 19 Cinema screens by exhibitors with 20 or more screens, 2018

Exhibitor	Sites	Screens	% of total screens
Cineworld	97	1,015	23.4
Odeon	108	878	20.2
Vue	87	840	19.4
National Amusements	21	278	6.4
Empire Cinemas	14	129	3.0
Omniplex	15	117	2.7
Everyman Media Group	27	84	1.9
Picturehouse (Cineworld)	25	82	1.9
Light Cinemas	10	74	1.7
Reel Cinemas	13	60	1.4
Curzon	13	43	1.0
Merlin Cinemas	15	42	1.0
Movie House Cinemas	5	39	0.9
Irish Multiplex Cinemas	5	34	0.8
PDJ Cinemas	5	23	0.5
Savoy Cinemas	4	21	0.5
Parkway Entertainment	4	20	0.5
Other (16 major exhibitors and 258 independent single venue exhibitors)	307	561	12.9
Total	**775**	**4,340**	**100.0**

Source: Dodona Research

Notes:

Figures correct as at December 2018.

Percentages may not sum to 100 due to rounding.

Cineworld was the only publicly-quoted exhibitor in the UK. It was formed in 1995 and acquired the former Cine-UK and UGC chains in 2004. It also acquired Picturehouse in 2012.

In 2016, the Odeon chain was bought by AMC Entertainment, a US cinema chain owned by Chinese conglomerate Dalian Wanda, the world's largest cinema operator. It was previously owned by Terra Firma Capital Partners, a European private equity firm.

Vue, which acquired Warner Village cinemas in 2003 and the Apollo cinema chain in 2012, was sold to Canadian investors Omers Private Equity and Alberta Investment Management in 2013.

National Amusements is owned by the family of Sumner Redstone, chairman of US media giant Viacom.

Empire is owned by the Anderson family. It emerged as a buyer of sites from UCI and Odeon in 2005 and UGC and Cineworld in 2006, which were divested as a result of the companies' mergers.

EXHIBITOR REVENUES

As Table 20 shows, the top seven exhibitors had a 79.5% share of overall box office receipts in the UK and Republic of Ireland in 2018; 66% of the box office was shared between the top three exhibitors.

Dodona Research reports that exhibitors' revenues from refreshment sales in 2018 were £549 million, an increase of 2% compared with 2017 (£537 million). The average spend on refreshments per individual visit decreased from £3.15 in 2017 to £3.10. (It should be noted that Dodona Research has revised its 2017 figures since publication of the 2018 Statistical Yearbook.)

Table 20 Exhibitor share of box office in the UK and Republic of Ireland, 2018

Exhibitor	Market share (%)	Box office gross (£ million)*
Cineworld	24.0	332.2
Odeon	22.5	310.5
Vue	19.9	274.9
National Amusements	6.1	84.2
Everyman Media Group	2.5	35.1
Picturehouse (Cineworld)	2.3	31.4
Empire Cinemas	2.2	30.7
Sub-total	**79.5**	**1,099.0**
Other	20.5	282.7
Total	**100.0**	**1,381.7**

Source: Dodona Research and comScore

Notes:

* Box office gross is for all films and event cinema screenings shown in cinemas in 2018. This includes titles which were first released in 2017.

Figures/percentages may not sum to totals/sub-totals due to rounding.

DIGITAL PROJECTION

Since 2014, nearly every screen in the UK has been capable of digital projection. The digitisation of cinema projection has increased the scope for making a wider range of films available to audiences and allowed for the introduction of subtitles for the hearing impaired and audio description for the visually impaired. Audiences are also able to watch films in digital 3D and access a wide range of alternative content programming, such as live screenings of cultural and sporting events.

ACCESSIBLE CINEMA

All UK cinemas now have English language subtitle/caption and audio description (ST/AD) facilities. Almost every multiplex cinema and many smaller cinemas (around 530 sites, almost 70% of all cinemas in the UK) regularly screen the latest popular releases with on-screen English language captions. There are around 1,500 such screenings weekly. The estimated audience for these screenings in 2018 was 1.1 million.

Data from 'YourLocalCinema.com' shows that in 2018, 183 English language films were shown in UK cinemas with captions, including all the top 100 films.

3D AND EVENT CINEMA

According to IHS Markit, of the 4,399 digital screens in the UK at the end of 2018, 2,063 (47%) were 3D-capable digital screens. (The total number of screens differs here to the figure used previously because of the different methodologies employed by IHS Markit and Dodona Research.) Some of the popular 3D screenings in 2018 included *Avengers: Infinity War*, *Jurassic Park: Fallen Kingdom* and *Black Panther*. Table 21 shows the increase in the number of 3D digital screens in the UK since 2009. The growth in such screens coincided with an increase in the availability of 3D content internationally. In 2018, 39 films were released in 3D (two more than in 2017).

Table 21 3D digital screens in the UK, 2009-2018

Year	Number of 3D digital screens	Total digital screens	3D % of all digital screens	Top performing digital 3D title in the UK and Republic of Ireland
2009	449	642	69.9	Avatar
2010	1,067	1,415	75.4	Toy Story 3
2011	1,475	2,714	54.3	Harry Potter and the Deathly Hallows: Part 2
2012	1,564	3,538	44.2	The Hobbit: An Unexpected Journey
2013	1,655	3,868	42.8	Gravity
2014	1,772	3,946	44.9	The Hobbit: The Battle of the Five Armies
2015	1,854	4,123	45.0	Star Wars: The Force Awakens
2016	1,908	4,231	45.1	Rogue One: A Star Wars Story
2017	2,038	4,309	47.3	Star Wars: The Last Jedi
2018	2,063	4,399	46.9	Avengers: Infinity War

Source: IHS Markit, comScore, BFI

Notes:

3D digital screens are capable of screening content made in stereoscopic 3D format.

Top performing digital 3D titles in the UK and Republic of Ireland are based on takings from 3D and IMAX 3D screenings.

Event cinema, alternative content or non-feature film programming has become a regular feature in the UK over recent years following the shift to digital projection. The roll-out of a digital screen base has widened the range of content available on the big screen, allowed for greater interactivity between the screen and the audience and has potentially improved the use of auditorium capacity during typically quiet periods. Also, since events are usually shown only once or twice (often as a simultaneous screening of a live performance or event and a subsequent catch-up screening) they can often generate higher occupancy rates than feature films.

Table 22 shows the number of events and box office takings by type of event released in 2018. According to comScore, 125 individual events, the majority of which were live, were screened (at least once) in the year, down from 134 in 2017. However, these events generated a total box office of £42 million compared with £34.5 million in 2017. Opera had the greatest number of releases in 2018 with screenings of 30 different productions (24% of all events), while screenings of theatre performances generated the highest earnings (£14 million), a 32% share of the total box office.

Table 22 Number and box office takings of event cinema releases in UK and Republic of Ireland cinemas by type of event, 2018 (ranked by gross box office)

Type of event	Number of events	% of events	Box office (£ million)	% of box office
Theatre	25	20.0	13.7	32.4
Film/documentary	21	16.8	10.5	24.8
Opera	30	24.0	6.2	14.7
Ballet/dance	19	15.2	5.6	13.2
Popular music concert	8	6.4	3.3	7.8
Classical concert	6	4.8	2.0	4.7
TV	4	3.2	0.6	1.4
Exhibition	8	6.4	0.4	0.9
Sport*	4	3.2	<0.1	0.0
Total	**125**	**100.0**	**42.3**	**100.0**

Source: comScore

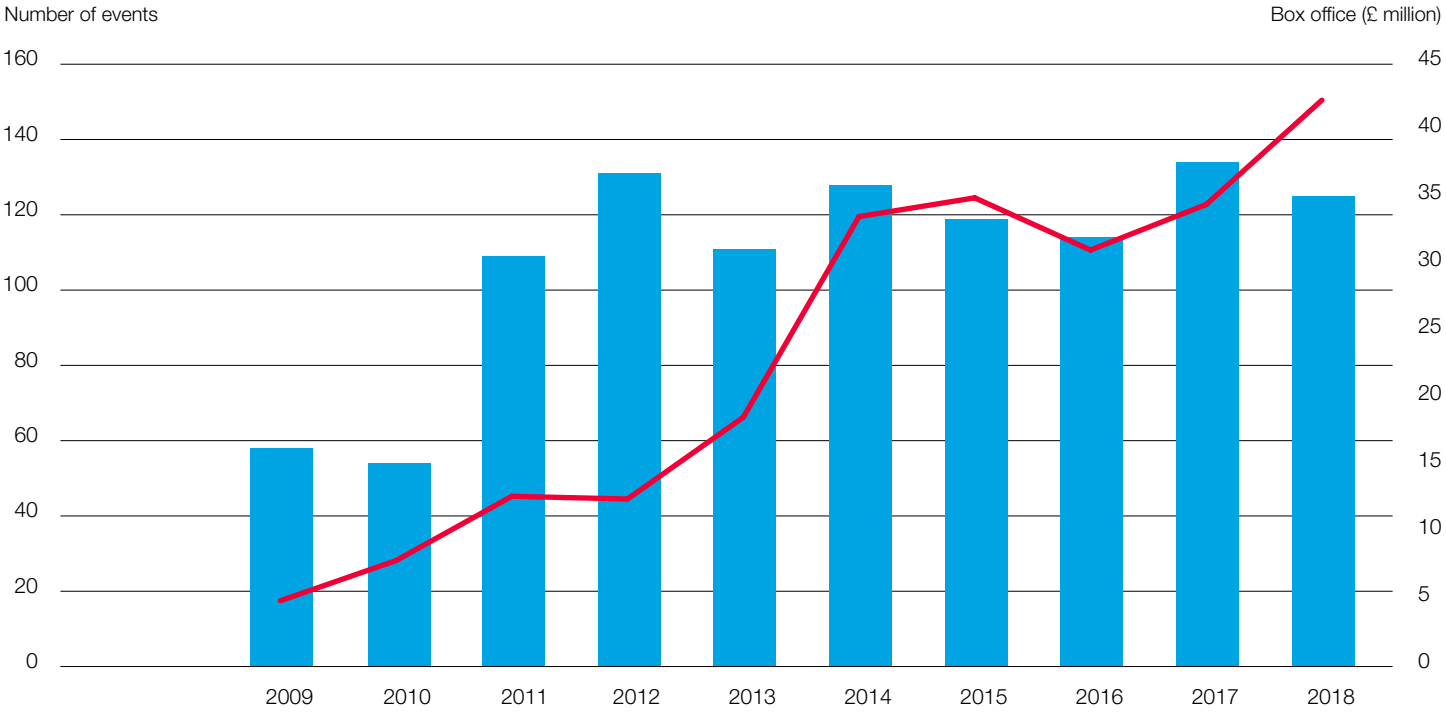
Notes:

Percentages/figures may not sum to totals due to rounding.

* Sport includes e-sporting events.

Figure 4 shows the total number of event cinema releases and their associated box office earnings between 2009 and 2018. Since 2011, the number of individual events screened annually has generally ranged between 110 and 130. There has been an overall upward trend in box office earnings over the period, with 2018 seeing record earnings of £42 million.

Figure 4 Total number of event cinema releases and box office earnings, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Number of events	58	54	109	131	111	128	119	114	134	125
Box office (£ million)	4.9	7.9	12.7	12.5	18.6	33.6	35.0	31.1	34.5	42.3

Source: comScore

Note: Data updated since publication of the 2018 Statistical Yearbook.

HOME ENTERTAINMENT

Facts in focus

VALUE OF FILM ON PHYSICAL VIDEO

Sales in 2018

£451 million

Down 10% on 2017

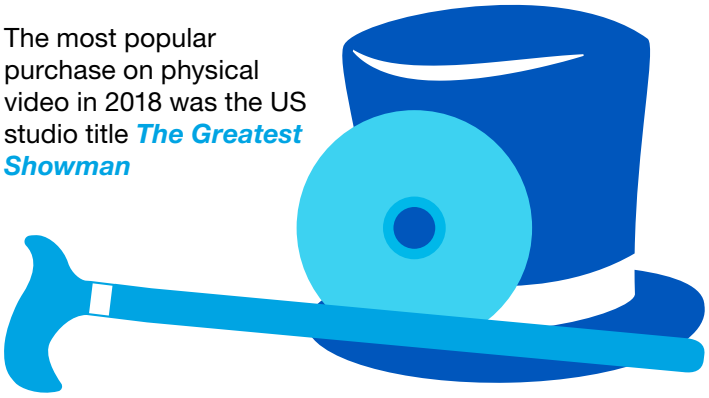
Rentals in 2018

£30 million

Down 19% on 2017

TOP FILM ON DVD AND BLU-RAY

The most popular purchase on physical video in 2018 was the US studio title ***The Greatest Showman***



VALUE OF DIGITAL VIDEO

Up 17% on 2017

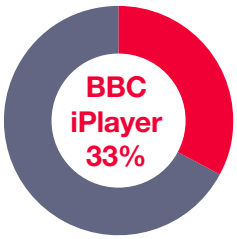
£794 million

Subscription Video on Demand (SVoD), Transactional Video on Demand (TVoD) rental and TVoD retail (Electronic Sell Through - EST)

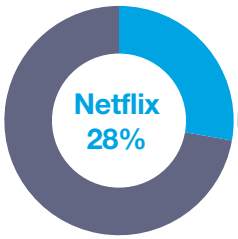
DIGITAL VIDEO PLATFORMS

% reach (UK adults 16+) of the UK's top VoD services in 2018

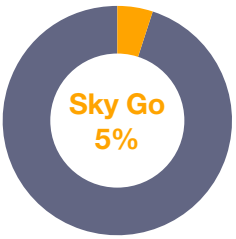
Top free/advert supported platform



Top OTT SVoD platform



Top pay TV platform



WHAT AUDIENCES WATCH ON SVOD

UK SVoD subscribers spend **24%** of their viewing time watching films and **76%** watching TV programmes

WHAT AUDIENCES WATCH ON SVOD

The most-watched film in 2018 on the top three SVoD platforms – Netflix, Amazon Prime and Now TV – was the Netflix original ***Bright***

FILM ON TELEVISION

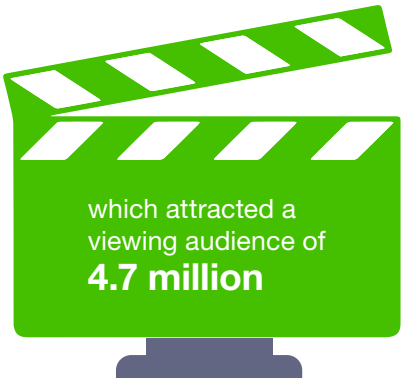
The value of feature film to UK broadcasters in 2018 was **£894 million**

Of which **£134 million** was attributable to UK films

In total, there were **2.3 billion** viewings of film on UK television in the year

TOP FILM ON TELEVISION

The most popular film on terrestrial television in 2018 was the Disney classic ***Mary Poppins***



which attracted a viewing audience of **4.7 million**

Home entertainment

FILM ON PHYSICAL VIDEO

The advent of streaming services has revolutionised the home entertainment market in recent years and provided audiences with far greater choice in how and where they can access feature film content. However, despite increasing competition from digital video and a decade plus of falling revenues, physical video remains an important element of the film value chain, illustrating that there is still an audience for film that appreciates physical ownership.

'Video' is used in this section as the generic description of all physical video, including DVD, Blu-ray and other physical formats, in line with the definition used by BASE, the British Association for Screen Entertainment; it does not include downloads which are discussed in the digital video section below.

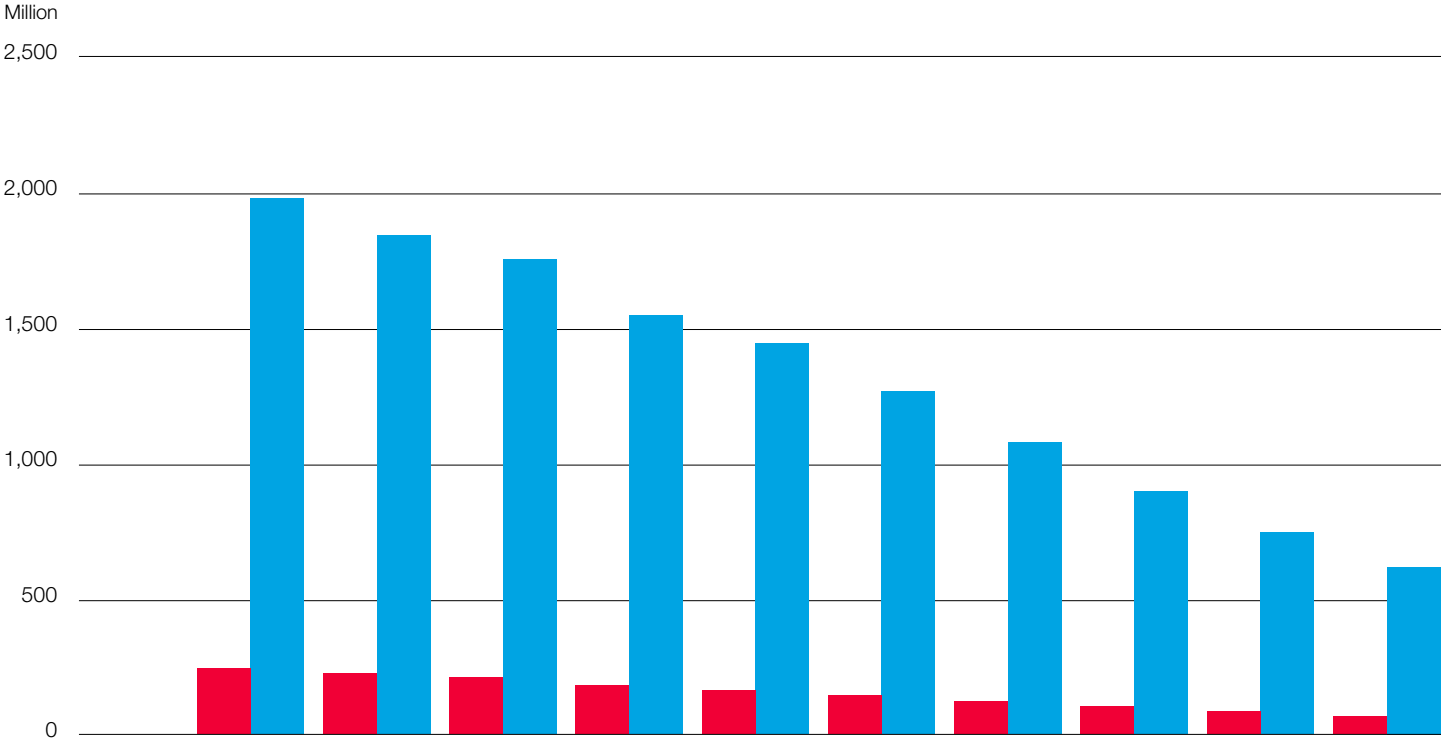
FILM IN THE PHYSICAL VIDEO RETAIL MARKET

As Figure 1 shows, the volume and value of physical video sales in all categories in the UK declined each year between 2009 and 2018. (This trend has been ongoing since the peak in video sales in 2004 when 234 million units were bought by consumers with a value of £2.5 billion.) Overall, the value of physical video sales in the UK fell by 69% over the period.

In 2018, 65 million videos were sold (down 22% compared with 2017) with a total market value of £617 million (down 17% compared with 2017). DVDs accounted for the majority of video sales (76% by value and 83% by volume), while Blu-ray disc purchases accounted for 24% of sales by value and 17% of sales by volume. (The share of the retail video market generated by Blu-ray sales, by both value and volume, has increased year on year since the format's introduction in 2006.)

Feature film represented approximately 73% of the physical sell-through market by value (£451 million) and 80% by volume (52 million units) in 2018. UK films accounted for around 35% of sales by value (a slight increase from 34% in 2017) and 39% of sales by volume (an increase from 31% in 2017).

Figure 1 Retail video sales (all categories), 2009-2018



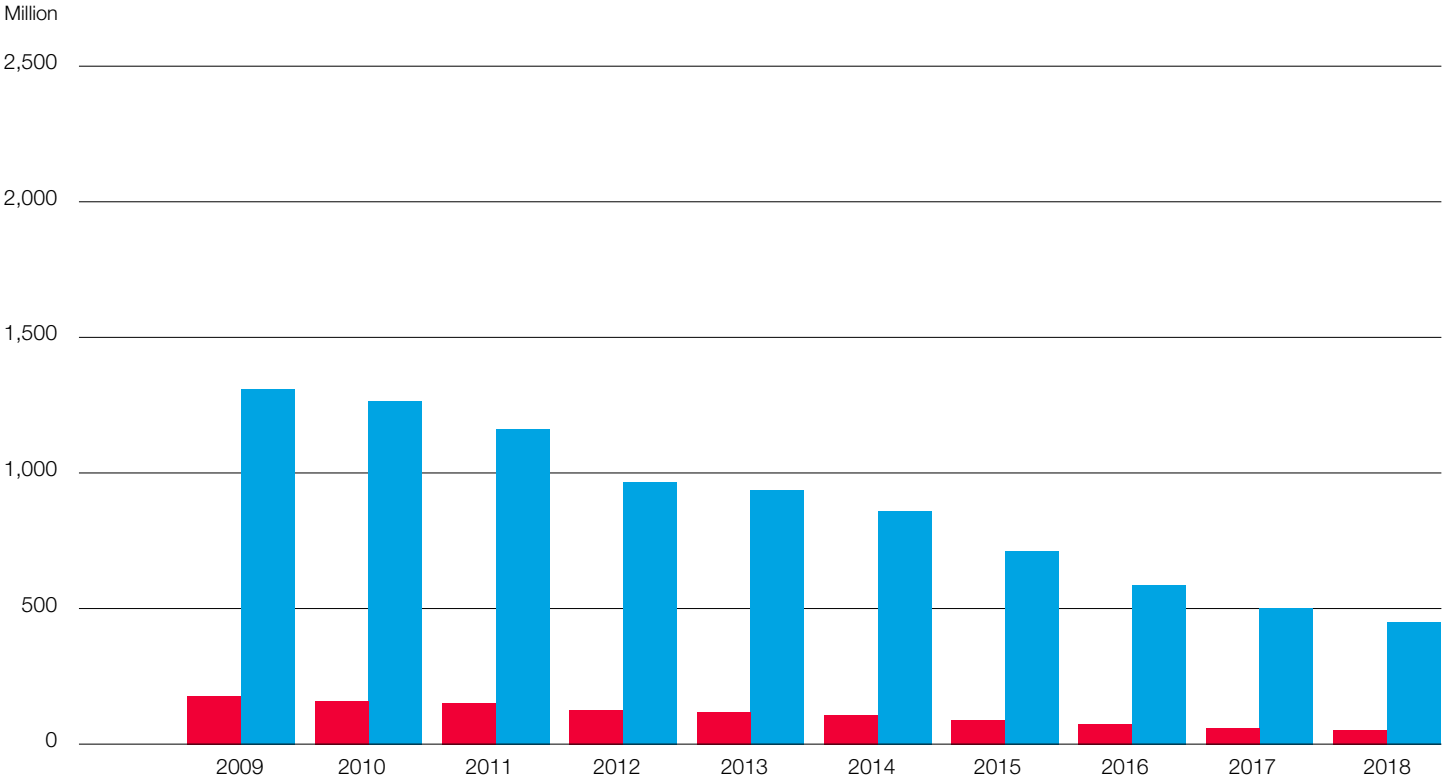
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Volume (million)	243	223	207	179	162	143	120	101	83	65
Value (£ million)	1,976	1,839	1,749	1,543	1,439	1,263	1,075	894	743	617

Source: IHS Markit

Note: Data in this table includes all categories of retail video, not only film.

As Figure 2 shows, the trend for sales of film on physical video between 2009 and 2018 has mirrored that of the overall physical sell-through market, albeit at a slightly slower rate (Figure 2). The volume of videos sold fell from 180 million units in 2009 to 52 million units in 2018, while the value of sales decreased from £1.3 billion to £451 million. Overall, the value of the retail market for film on physical video in the UK decreased by 66% over the period.

Figure 2 Film on physical video retail sales, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Volume (million)	180	160	152	127	119	110	89	75	62	52
Value (£ million)	1,311	1,267	1,165	968	940	861	712	589	503	451

Source: BFI RSU analysis of Official Charts Company and BASE data

Note: Includes some feature films which would be classified as 'children's' videos in the BASE Yearbook.

Figure 3 shows an overall upward trend in the average unit price for film on physical video formats during the period, with costs rising from £7.29 in 2009 to £8.60 in 2018. The cost increase is due in part to the increasing share of Blu-ray sales in the physical video market, as this format generally attracts higher prices than its DVD counterpart.

Figure 3 Average retail price of film per unit, 2009-2018

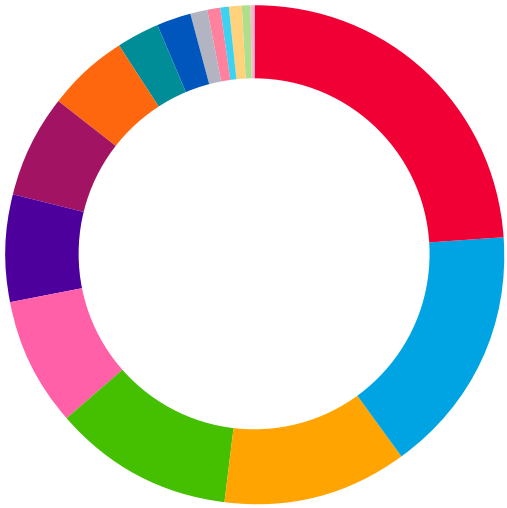
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Price (£)	7.29	7.90	7.64	7.62	7.93	7.83	8.36	7.91	8.06	8.60

Source: BFI RSU analysis of Official Charts Company and BASE data

As Figure 4 shows, the most popular film genre on sell-through video in 2018 was action/adventure, which accounted for 24% of the market (18% in 2017). Sci-fi was the next most popular with 16% of sales, followed by children's animated with 12%. (It should be noted that these categories, as defined by BASE, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in the first chapter of the Yearbook, Film at the cinema.)

Figure 4 Sales of film on physical video formats by genre, 2018

Genre	%
Action/adventure	24.1
Sci-fi	16.0
Children's animated	12.0
Drama	11.6
Musical	8.4
Child/family	7.0
Comedy	6.6
Horror	5.5
Thriller	2.6
War	2.4
Documentary	0.9
Anime	0.8
Fitness	0.8
Western	0.7
Sport/health/fitness	0.6
Adult	0.1
Bollywood	<0.1
Other	<0.1



Source: Official Charts Company, BASE

Image: *Paddington 2* courtesy of StudioCanal

TOP FILMS ON PHYSICAL VIDEO

Table 1 shows the top 10 best-selling films on physical video in 2018. The list is headed by *The Greatest Showman*, one of four titles released at the UK and Republic of Ireland box office in 2017. The remainder of the list is made up of 2018 theatrical releases, including the year's top earning film, *Avengers: Infinity War*. All of the 2018 releases were top 20 box office earners. There are five UK films in the list, one of which is an independent title.

Table 1 Top 10 best-selling films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	The Greatest Showman	USA	2017	20th Century Fox
2	Star Wars: The Last Jedi	UK/USA	2017	Walt Disney
3	Mamma Mia! Here We Go Again	UK/USA	2018	Universal
4	Avengers: Infinity War	UK/USA	2018	Walt Disney
5	Thor: Ragnarok	USA	2017	Walt Disney
6	Black Panther	USA	2018	Walt Disney
7	Paddington 2	UK/Fra	2017	StudioCanal
8	Solo: A Star Wars Story	UK/USA	2018	Walt Disney
9	Peter Rabbit	USA/Aus	2018	Sony
10	Deadpool 2	USA	2018	20th Century Fox

Source: Official Charts Company

As Table 2 shows, the top 10 best-selling UK qualifying films on physical video in 2018 include five titles which are also in the year's overall top 10 films on video chart. The list is headed by *Star Wars: The Last Jedi*, the top earning film at the UK and Republic of Ireland box office in 2017, and one of four titles released theatrically in that year. The six remaining titles in the chart were released theatrically in 2018. There are two UK independent films in the list, up from one in 2017.

Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Star Wars: The Last Jedi	UK/USA	2017	Walt Disney
2	Mamma Mia! Here We Go Again	UK/USA	2018	Universal
3	Avengers: Infinity War	UK/USA	2018	Walt Disney
4	Paddington 2	UK/Fra	2017	StudioCanal
5	Solo: A Star Wars Story	UK/USA	2018	Walt Disney
6	Jurassic World: Fallen Kingdom	UK/USA	2018	Universal
7	Darkest Hour	UK/USA#	2018	Universal
8	Justice League	UK/USA/Can	2017	Warner Bros
9	Kingsman: The Golden Circle	UK/USA	2017	20th Century Fox
10	Mission: Impossible - Fallout	UK/USA	2018	Universal

Source: Official Charts Company, BFI RSU

Film made with independent (non-studio) US support or with the independent arm of a US studio.

The list of the top 10 best-selling UK independent films on physical video in 2018 is headed by *Paddington 2*, the only film to appear in all of the three main top 10 tables. Unusually, this title appears twice in the current list – as a single physical video release and as part of a box set with the original 2014 release. The first Paddington film appears in the top 10 list for the fourth consecutive year, which indicates the enduring popularity of this series with British audiences.

Table 3 Top 10 best-selling UK independent films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Paddington 2	UK/Fra	2017	StudioCanal
2	Darkest Hour	UK/USA#	2018	Universal
3	Victoria & Abdul	UK/USA#	2017	Universal
4	Early Man	UK/Fra	2018	StudioCanal
5	Paddington - 1 & 2	UK/Fra	2014/2017	StudioCanal
6	Three Billboards Outside Ebbing, Missouri	UK/USA#	2018	20th Century Fox
7	The Guernsey Literary and Potato Peel Pie Society	UK/Fra/USA#	2018	StudioCanal
8	Red Sparrow	UK/USA/Hun#	2018	20th Century Fox
9	The Commuter	UK/Fra/USA#	2018	StudioCanal
10	Finding Your Feet	UK	2018	20th Century Fox

Source: Official Charts Company, BFI RSU

Film made with independent (non-studio) US support or with the independent arm of a US studio.

As Table 4 shows, the top 10 list of best-selling feature documentaries on physical video in 2018 is evenly split between sports-related films and others. (This is the first top 10 chart since 2013 not to be dominated by films about sport or sports personalities.)

The two most popular documentary films on physical video in the year were both war-themed titles: Peter Jackson's homage to the troops of WWI, *They Shall Not Grow Old*, and *Spitfire*, a film about the role of the iconic WWII fighter plane and its pilots in the Battle of Britain. (*They Shall Not Grow Old* was also the year's most successful non-concert UK documentary at the UK and Republic of Ireland box office.) Four of the five sports titles are football-related documentaries. There are two films about players turned managers – *Bobby Robson: More Than a Manager* and *Kenny*, the story of Kenny Dalglish – and two films about football teams – *89*, a film about Arsenal's last-minute footballing triumph in the 1988/89 season and *Take the Ball, Pass the Ball*, a film about FC Barcelona's success under manager Pep Guardiola. The other titles in the list are: *Conor McGregor: Notorious*, a film about the controversial Irish martial arts fighter; *My Generation*, a film about the Sixties cultural revolution in the UK; *McQueen*, a biopic of British fashion designer Alexander McQueen; and *Fred: The Godfather of British Crime*, a film about the ageing gangster Freddie Foreman.

Three of the films in the table also appeared in the 2017 top 10 list: 89, *Conor McGregor: Notorious* and *Kenny*. Eight of the top 10 films are UK qualifying productions.

Table 4 Top 10 best-selling documentary films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	They Shall Not Grow Old	UK	2018	Warner Bros
2	Spitfire	UK	2018	Altitude
3	Bobby Robson: More Than a Manager	UK	2018	Spirit Entertainment
4	My Generation	UK	2018	Lionsgate
5	Conor McGregor: Notorious	Ire	2017	Universal
6	Kenny	UK	2017	Spirit Entertainment
7	McQueen	UK	2018	Lionsgate
8	Fred: The Godfather of British Crime	UK	2018	Lionsgate
9	89	UK	2017	Universal
10	Take the Ball, Pass the Ball	Spa	2018	Universal

Source: Official Charts Company, BFI RSU

Note: Titles based on music concerts are not included.

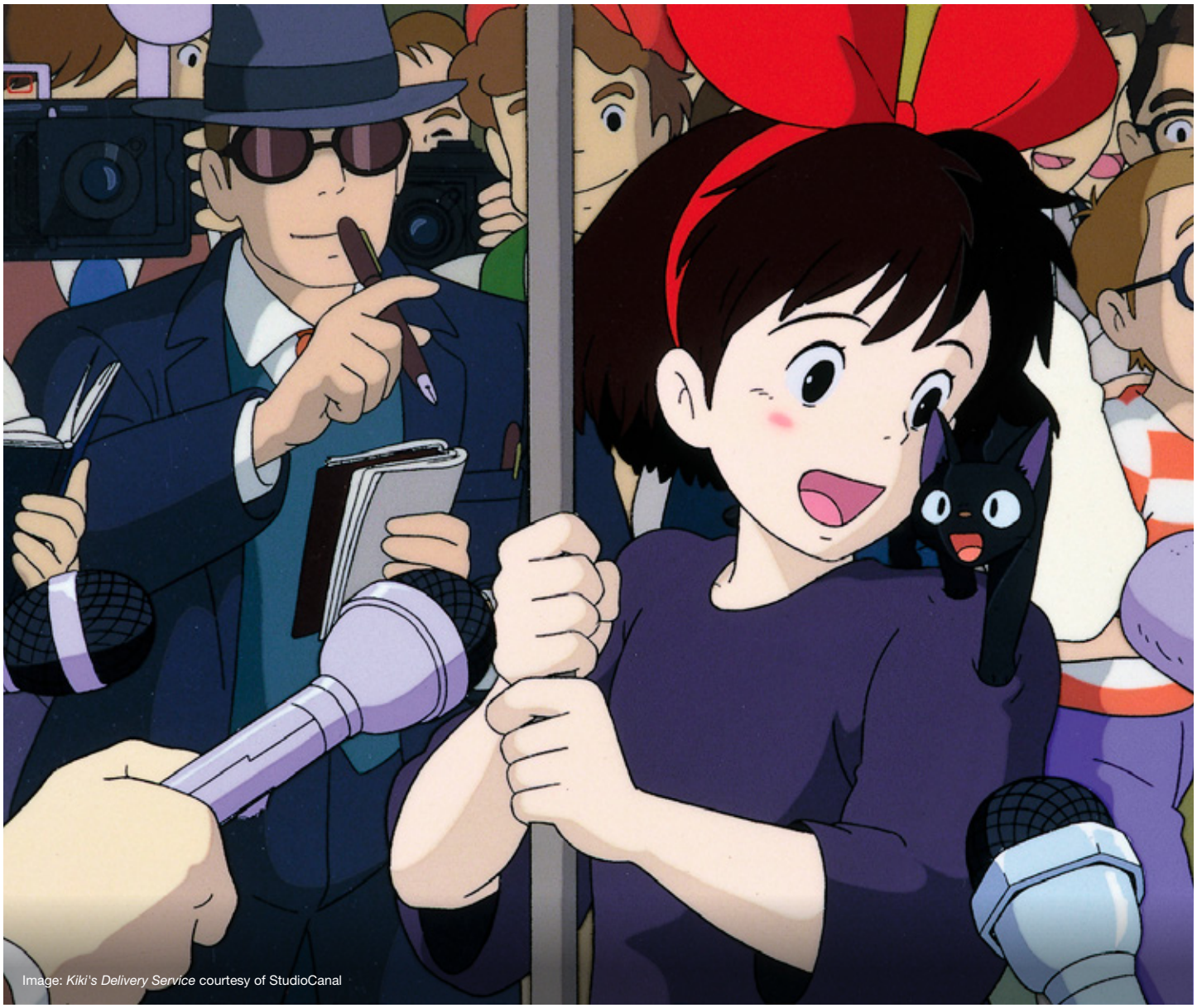


Image: *Kiki's Delivery Service* courtesy of StudioCanal

Eight of the top 10 best-selling foreign language films on physical video in 2018 were Japanese titles, six of which are from the catalogue of Studio Ghibli. The list is headed by Hayao Miyazaki's Studio Ghibli production *My Neighbour Totoro*, which appears in the top 10 for the fourth consecutive year. (Five of the Studio Ghibli titles were directed by Miyazaki.) The two other Japanese titles in the top 10 are Makoto Shinkai's anime film *Your Name* and Takashi Miike's live-action manga adaptation *Blade of the Immortal* (a UK co-production).

The two non-Japanese films in the list are the Chinese WWII film *The Bombing* (in Mandarin, English and Japanese) and the French/Belgian thriller *Revenge* (in French and English).

Table 5 Top 10 best-selling foreign language films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	My Neighbour Totoro	Jpn	1989	StudioCanal
2	Your Name	Jpn	2016	Anime
3	Blade of the Immortal	UK/Jpn/S.Kor	2017	Arrow Films
4	Howl's Moving Castle	Jpn	2005	StudioCanal
5	Princess Mononoke	Jpn	2001	StudioCanal
6	The Bombing	Chn	2018*	Signature Entertainment
7	Kiki's Delivery Service	Jpn	1991	StudioCanal
8	Revenge	Fra/Bel	2018	Thunderbird
9	Ponyo	Jpn	2010	StudioCanal
10	The Cat Returns	Jpn	2005	StudioCanal

Source: Official Charts Company, BFI RSU

Notes:

The animated films in this table were all released on physical video with the option to view either with the original Japanese language soundtrack (with English subtitles) or with a dubbed version.

* *The Bombing* was released theatrically in the Philippines and other territories in 2018. It was released straight to video in the UK in the same year.

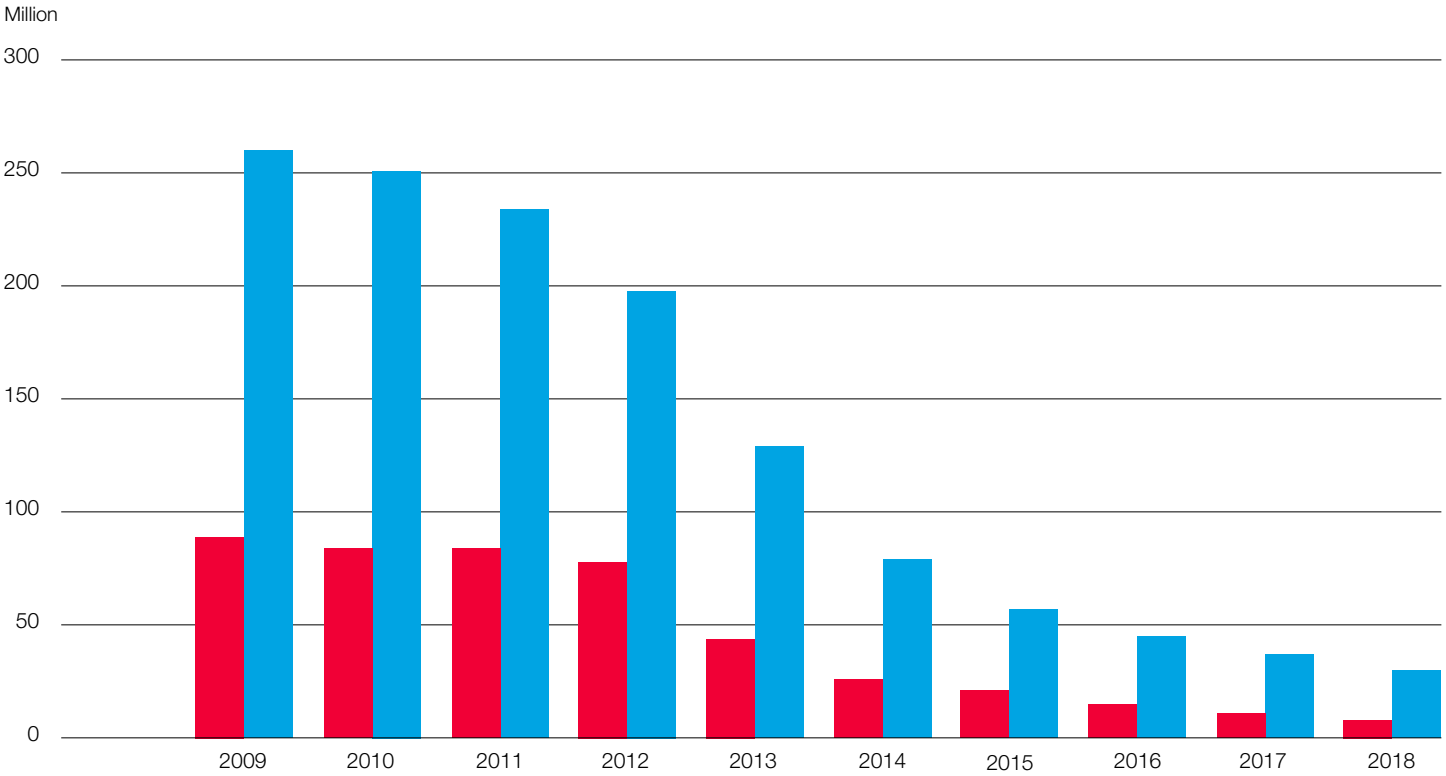
Older titles, in particular classic family films, also remain popular video purchases, due in part to theatrical re-releases or other events associated with the films. In 2018, three films re-released on video to coincide with upcoming sequels or re-makes – *Mary Poppins* (1964), *The Lion King* (1994) and *The Grinch* (released theatrically as *The Grinch who Stole Christmas* in 2000) – appeared in the list of the year's top 100 best-selling films on video.

FILM IN THE PHYSICAL VIDEO RENTAL MARKET

While competition from streaming services has contributed to a significant contraction in the video sell-through market, its impact on the rental market has been more consequential. At £30 million, revenues from rentals in 2018 represent less than 12% of the market's value in 2009 (£260 million), while the volume of transactions was down 91%, from 89 million in 2009 to eight million in 2018 (Figure 5). With the exception of Cinema Paradiso, all of the major physical video rental providers have ceased operating. According to BASE, the pool of traditional physical rental customers in the UK in 2018 was 500,000 people, a drop of 50% compared with 2017.

The average price of a physical video rental in 2018 was £3.75, and online renting of physical discs (with postal delivery) accounted for 78% of rental transactions.

Figure 5 Film on physical video rental market, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Transactions (million)	89	84	84	78	44	26	21	15	11	8
Value (£ million)	260	251	234	198	129	79	57	45	37	30

Source: IHS

FILM ON DIGITAL VIDEO

With the exception of cinema-goers, UK audiences for film are increasingly retreating from traditional methods of film consumption in favour of on-demand services. In 2018, digital video represented approximately 23% of the value of the UK filmed entertainment market, compared with only 3% in 2009.

Digital video or Video on Demand (VoD) is used in this section as the generic description of both over the top (OTT) streamed or downloaded content delivered via the internet and on-demand content offered by traditional cable or satellite pay TV services such as Sky.

OTT service providers in the UK employ three basic types of business model:

- Transactional (TVoD) which comprises:
  rental digital video, a one-off rental for a limited time, including both streaming and Download to Rent (DTR); and retail digital video, also known as Electronic Sell Through (EST) or Download to Own (DTO) – most providers of transactional on-demand services, such as iTunes or Google Play, offer both rental and retail film content, however some services, such as Curzon Home Cinema, deal exclusively with rental content

- Subscription (SVoD) which delivers unlimited access to content for a regular fixed sum – providers include Netflix, Amazon Prime Video and Now TV

- Free/advert-supported – providers include YouTube (excluding YouTube Premium), Facebook Watch and catch-up services from the major broadcasters (also known as BVoD) such as BBC iPlayer and ITV Hub (excluding ITV Hub+).

Image: *Avengers: Age of Ultron* ©2015 Marvel

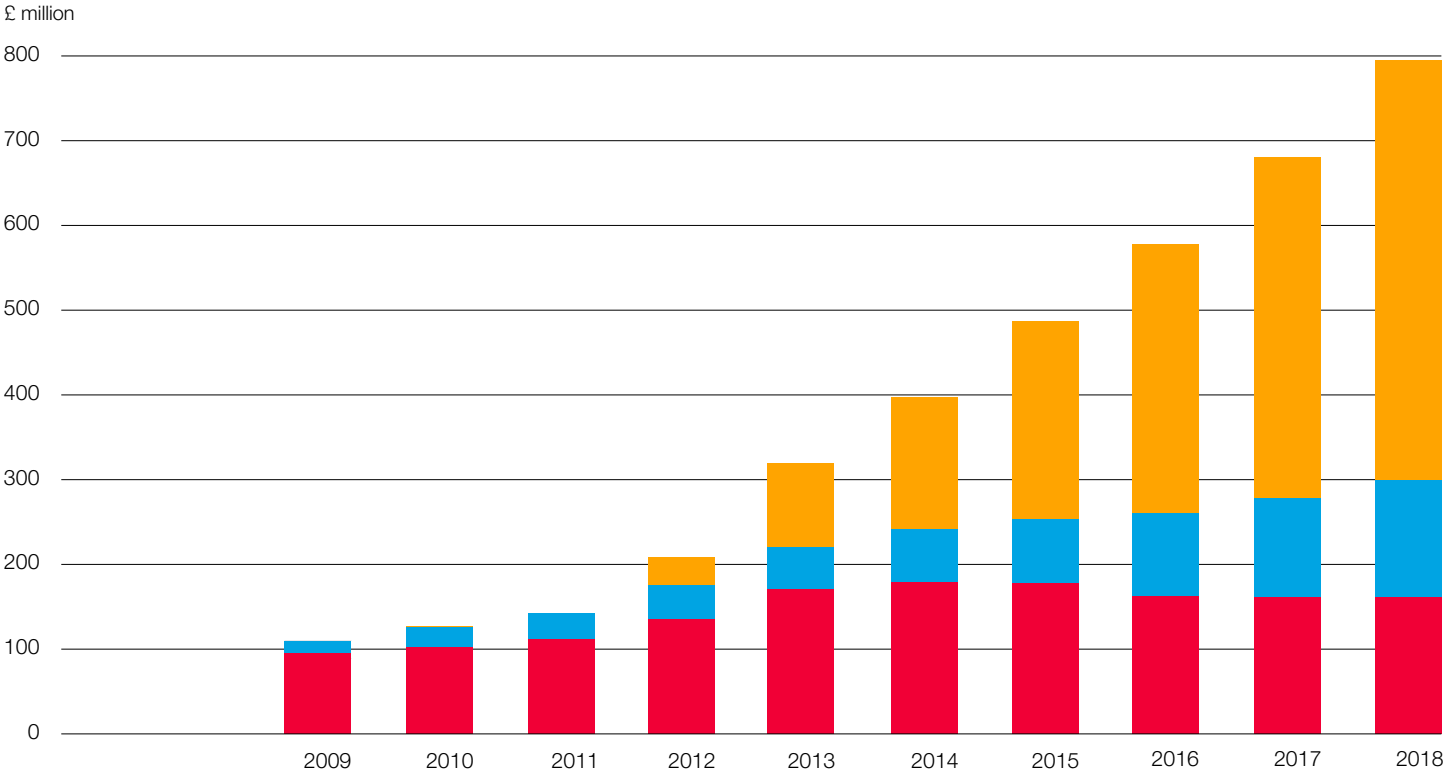
FILM IN THE DIGITAL VIDEO MARKET

According to IHS, the estimated value of the on-demand market for film in the UK in 2018 was £794 million, an increase of 17% compared with 2017, and more than seven times its value in 2009 (Figure 6).

Much of the recent growth in the market is attributable to a rise in the use of subscription streaming services. Revenues from SVoD platforms are estimated to have been £495 million in 2018, an increase of 23% compared with 2017 (£402 million). Overall TVoD revenues were also up compared with 2017 but only due to a rise in retail sales: EST revenues in 2018 are estimated to have been £139 million, an increase of 18% compared with 2017 (£118 million), while rental revenues were unchanged at £161 million.

In 2018, digital video revenues outstripped those of physical video for the second consecutive year.

Figure 6 Estimated value of the digital video film market in the UK, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
TVoD rental	95	102	111	135	170	179	178	162	161	161
TVoD retail (EST)	15	24	31	41	50	62	76	98	118	139
SVoD	-	1	1	32	100	156	233	318	402	495
Total	**110**	**127**	**142**	**208**	**320**	**397**	**487**	**578**	**681**	**794**

Source: IHS

Notes:

Estimates include both television-based and online digital video revenues.

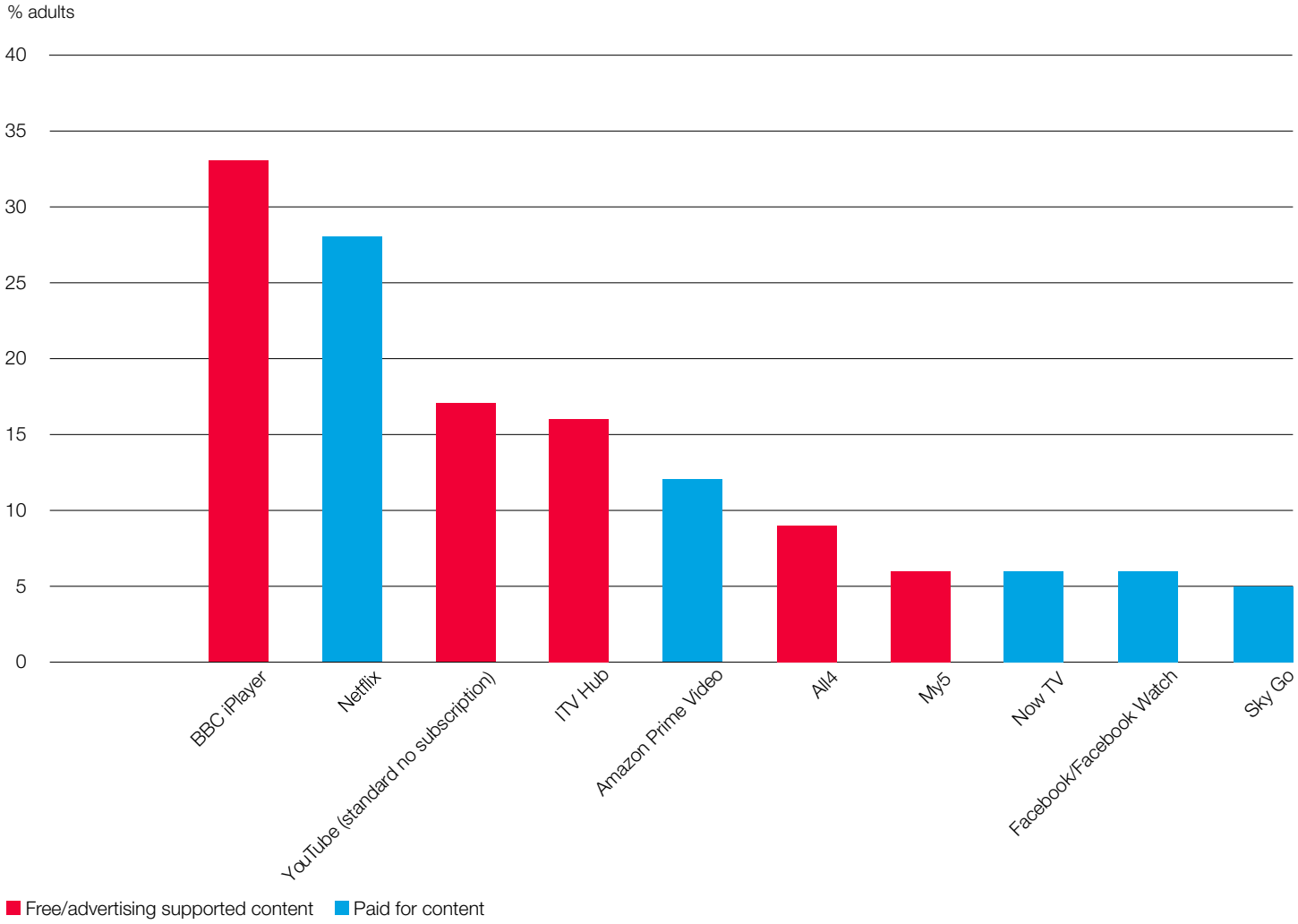
Figures may not sum to totals due to rounding.

POPULARITY OF ON-DEMAND STREAMING SERVICES

UK viewers are among the highest consumers of on-demand content in the world, thanks to the popularity of both international SVoD platforms and catch-up services from domestic broadcasters. Data from Ampere Analysis shows that as of Q1 2019, 78% of all households in the UK watch VoD at least once a month, compared with 64% in Germany and 51% in France.

Figure 7 shows the top 10 most popular on-demand streaming services (for both film and television programmes) in 2018 amongst UK adults (16+). The top 10 is split evenly between free/advert supported and paid-for services, and features all of the UK-wide broadcaster catch-up services. The BBC iPlayer (used by 33% of adults) was the most popular service overall, Netflix (28%) was the most popular OTT SVoD service, and Sky Go (5%) was the most popular pay TV provider.

Figure 7 Top 10 most popular on-demand streaming services in the UK, 2018



	BBC iPlayer	Netflix	YouTube (standard no subscription)	ITV Hub	Amazon Prime Video	All4	My5	Now TV	Facebook/Facebook Watch	Sky Go
Adults (16+) %	33	28	17	16	12	9	6	6	6	5

Source: Ofcom Technology Tracker 2018

Q: Do you use any of these services to view online TV programmes or films via any type of device (including a mobile phone, tablet, or TV set)? n=3,730

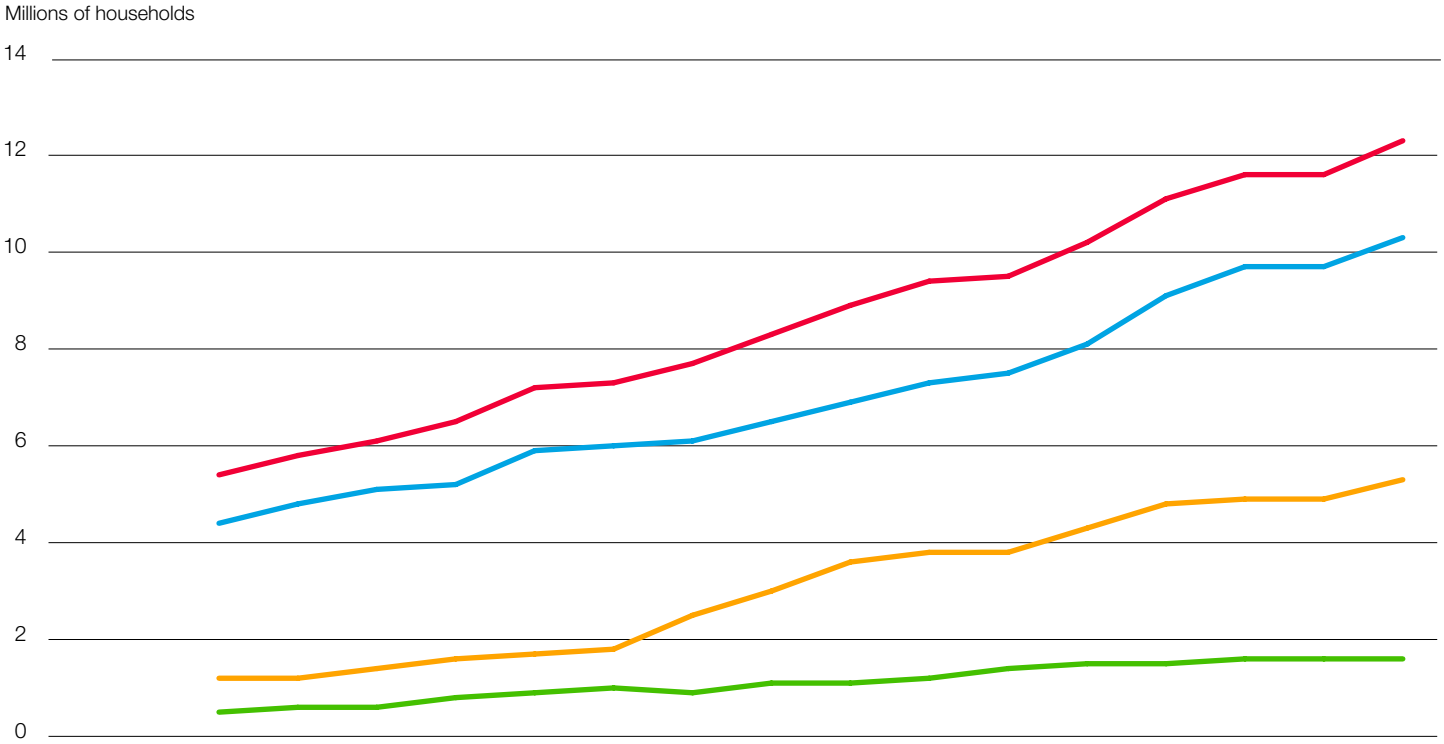
Note: The source of this data has changed since publication of the 2018 Statistical Yearbook; the users share for individual services are not directly comparable with previously published data, however, the overall ranking is similar.

THE AUDIENCE FOR SVoD

One of the key drivers of growth in the digital video market in the UK in recent years has been the rapid take-up of OTT SVoD services. As Figure 8 shows, the number of households with access to these services increased from 5.4 million in Q1 2015 to 12.3 million in Q4 2018, due largely to rising subscriber numbers for the three most popular providers: Netflix, Amazon Prime Video and Now TV (owned and operated by Sky). In Q4 2018, Netflix was available in 10.3 million UK homes, Amazon Prime Video in 5.3 million homes, and Now TV in 1.6 million homes.

As the overall number of subscriptions to UK SVoD services has increased, so too has the number of households opting to sign up to more than one platform. According to BARB Establishment Survey data, by Q4 2018, 4.3 million households had access to two or more SVoD services, a rise of 32% compared with 3.3 million in Q4 2017. (For more on SVoD audiences, see the Audiences chapter.)

Figure 8: UK SVoD households, Q1 2015 – Q4 2018



	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Any SVoD	5.4	5.8	6.1	6.5	7.2	7.3	7.7	8.3	8.9	9.4	9.5	10.2	11.1	11.6	11.6	12.3
Netflix	4.4	4.8	5.1	5.2	5.9	6	6.1	6.5	6.9	7.3	7.5	8.1	9.1	9.7	9.7	10.3
Amazon	1.2	1.2	1.4	1.6	1.7	1.8	2.5	3	3.6	3.8	3.8	4.3	4.8	4.9	4.9	5.3
Now TV	0.5	0.6	0.6	0.8	0.9	1	0.9	1.1	1.1	1.2	1.4	1.5	1.5	1.6	1.6	1.6

Source: BARB Establishment Survey, RSU analysis

THE AUDIENCE FOR FILM ON SVoD

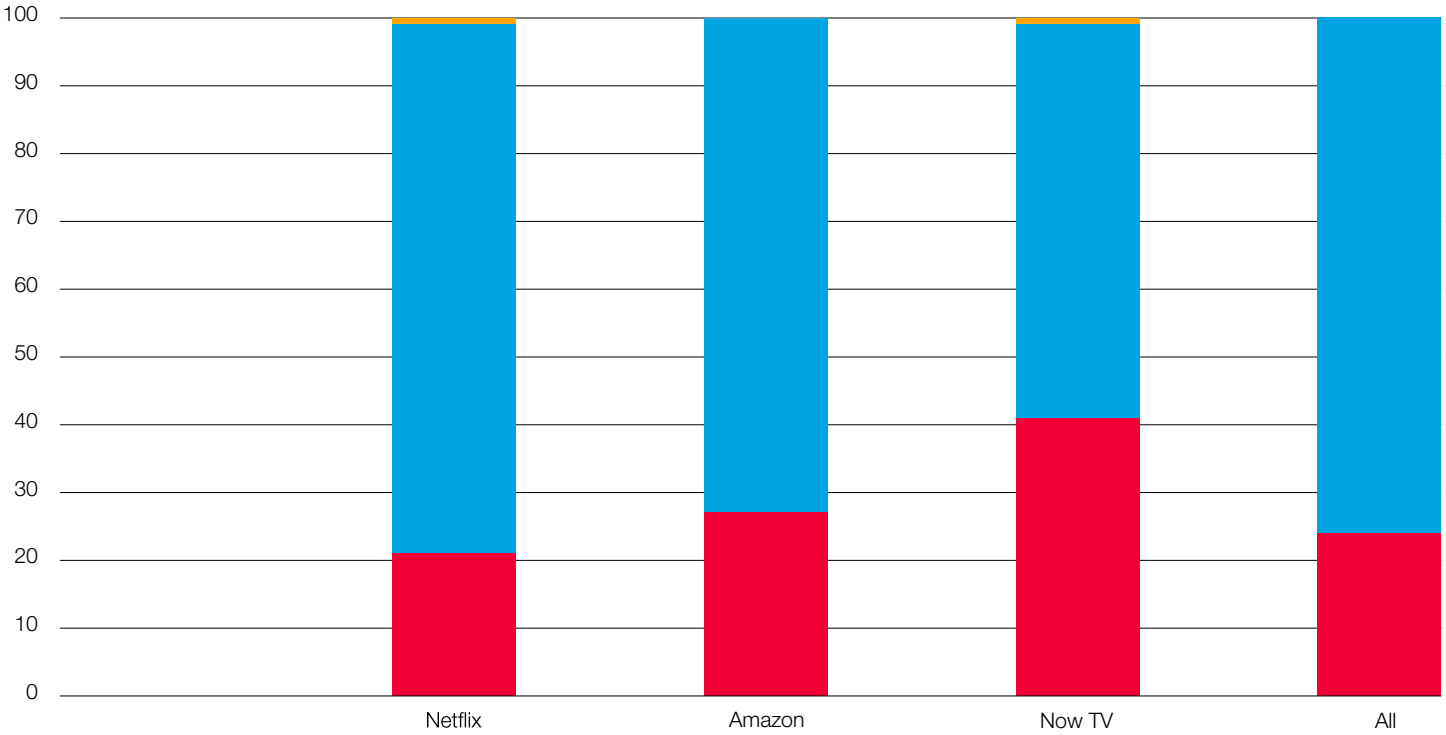
One of the key differences in the content of SVoD and BVoD platforms in the UK is the general lack of availability of feature film on the broadcaster services. Although making up a smaller proportion of the content libraries of SVoD platforms than archive or commissioned television series, feature film is an important component of the programming mix.

Figure 9 shows the share of viewing time devoted to film vs television programmes by subscribers to the UK's three main SVoD platforms compared with all SVoD users. On average, UK subscribers devote just under one quarter (24%) of their total viewing time to watching films. Amongst the top three providers, Now TV subscribers spend the largest share of their viewing time watching films (41%) while Netflix subscribers spend the smallest (21%).

It is interesting to note that while the consumption of film across SVoD platforms is lower than that of television content, it is considerably higher than on linear television. According to BARB data, in 2018, film accounted for around 8% of all viewing time on television. (Viewing figures are not directly comparable, however, as television offers a wider mix of programming including news, current affairs and sports.)

Figure 9 Share of viewing by content on UK SVoD platforms, 2018

% of all minutes consumed



	Netflix	Amazon	Now TV	All
Film	21	27	41	24
TV series	78	73	58	76
Other TV	1	0	1	<1

Source: GfK, UK SVoD Tracker, Calendar 2018, All adults 18+ who use SVoD platforms at least once every two weeks

Note: Other TV includes non-series television productions, such as single dramas and one-off specials.

TOP FILMS ON SVoD

Table 6 lists the top 10 most popular films viewed on the UK's three largest subscription streaming platforms in 2018. It should be noted that unlike other top 10 or 20 lists in the Yearbook, entries in the table are derived from a sample so should be viewed as indicative rather than definitive.

The list is headed by *Bright*, an original Netflix production released directly on the platform in late 2017, and one of two titles to appear in the top 10 for a second consecutive year (the other is *Avengers: Age of Ultron*). There are two other Netflix original films in the list: *The Christmas Chronicles*, which was also released directly on the platform, and *Outlaw King*, which had a limited day-and-date theatrical release in the UK through Curzon Artificial Eye alongside its Netflix premiere. Nine of the titles were exclusively available to stream on Netflix in 2018, although some of the titles were also available to VoD consumers via rentals on other platforms. With the exception of the Netflix originals, all but one of the top 10 titles were 2014-2017 theatrical releases. *Love Actually*, which was released theatrically in 2003, is one of four UK qualifying productions in the list.

Table 6 Top 10 films viewed on leading UK SVoD platforms, 2018 (ranked by minutes consumed)

Rank	Title	Country of origin	Main provider	Year of release in the UK	% share of total film minutes consumed
1	Bright*	USA	Netflix	2017	0.69
2	The Christmas Chronicles*	USA/Can	Netflix	2018	0.65
3	The Hitman's Bodyguard	UK/USA/Nld	Netflix	2017	0.55
4	Deadpool	USA	Netflix	2016	0.50
5	Love Actually	UK/Fra/USA	Netflix	2003	0.41
6	Outlaw King*	UK/USA	Netflix	2018	0.40
7	Batman v Superman: Dawn of Justice	USA	Amazon Prime Video	2016	0.39
8	Avengers: Age of Ultron	UK/USA	Netflix	2015	0.39
9	Captain America: The Winter Soldier	USA	Netflix	2014	0.39
10	Captain America: Civil War	USA	Netflix	2016	0.38

Source: RSU, GfK, UK SVoD Tracker, Calendar 2018, claimed viewership on Amazon Prime Video, Netflix or Now TV

Notes:

Due to the low figures for percentage of total minutes viewed, figures are shown to two decimal places.

* Film was released directly on the Netflix platform without a prior cinema release, or with a limited cinematic release.

Image: *Deadpool* courtesy of Twentieth Century Fox. All rights reserved

In the few years since Netflix launched its first original film (*Beasts of No Nation*, 2015) the streaming giant has come to rival the Hollywood majors in the scale of its annual film offer. In 2018, Netflix released 70 original films (not counting feature documentaries) on its streaming service compared with 86 theatrical releases from the six major studios. With the platform set to lose some licensed content (across both film and television) as providers move to launch their own SVoD services (e.g. Disney+), original content has become an increasingly important part of the platform's business. To raise the profile of its original films brand, Netflix has adopted a theatrical/streaming release strategy for a number of key titles which has seen the platform garner increasing numbers of award nominations (Netflix films received 15 nominations at the 2019 Academy Awards® and won in four categories).

Table 7 shows the top 10 most viewed original Netflix films by users of the platform. The list is headed by the three originals which appear in the previous top 10: *Bright, The Christmas Chronicles* and *Outlaw King*. Interestingly, the fourth most popular original on the list is *Bird Box* which was released on the platform on 21 December, eight days before the close of the year. (Our analysis of a cross section of Netflix originals shows that, on average, 51% of all viewing for these titles took place in the first two months of release on the platform.) The Netflix original film *Roma*, which received a day-and-date release in November 2018, and went on to win four BAFTA Awards and three Oscars® in 2019, does not appear in the list.

Table 7 Top 10 Netflix original films*, 2018 (ranked by minutes consumed)

Rank	Title	Country of origin	Year of release in the UK	% share of total Netflix minutes consumed
1	Bright	USA	2017	1.09
2	The Christmas Chronicles	USA	2018	1.02
3	Outlaw King	UK/USA	2018	0.64
4	Bird Box	USA	2018	0.58
5	Annihilation	UK/USA	2017	0.57
6	The Kissing Booth	USA	2018	0.47
7	To All the Boys I Loved Before	USA	2018	0.45
8	The Cloverfield Paradox	USA	2018	0.44
9	The Princess Switch	USA	2018	0.40
10	The Foreigner	UK/USA/Chn	2017	0.37

Source: RSU, GfK, UK SVoD Tracker, Calendar 2018, claimed viewership on Amazon Prime Video, Netflix or Now TV

Notes:

* The Netflix classification of originals includes titles commissioned directly by the platform, or those purchased from the Hollywood majors and other producers for exclusive distribution in some or all worldwide territories.

Due to the low figures for percentage of total minutes viewed, figures are shown to two decimal places.

FILM ON TELEVISION

Despite increased competition from on-demand providers of film content, in terms of viewer numbers television remains the single most important platform for film consumption in the UK. Viewers had a choice of 7,100 unique films titles across all channels in 2018, and the cumulative film audience was 2.3 billion.

PROGRAMMING ON THE TERRESTRIAL CHANNELS

In 2018, terrestrial television channels accounted for 24% of all viewings of film on television. (Terrestrial television is used here to describe the previous national terrestrial analogue services, all of which have some degree of public service obligation.) Table 8 shows the total number of feature films broadcast on the five terrestrial channels in 2018 and the number of UK titles broadcast in that time. UK films are broken down into recent titles (films released theatrically between 2009 and 2018) and older titles (released pre-2009). Here, UK films include all titles listed as UK-originated by the Broadcasters' Audience Research Board (BARB), plus UK qualifying films given other nationalities (mostly USA) in the BARB data.

There were 1,298 film transmissions on terrestrial television in 2018, down from 1,666 in 2017, an average of just over four films a day. Over one quarter (28%) of the films shown were UK titles. Channel 4 broadcast the greatest number of films overall (412) and the greatest number of recent UK films (75) while BBC Two showed the greatest number of UK films overall (121).

In total, the terrestrial channels broadcast 1,093 unique film titles in 2018, down from 1,278 unique titles in 2017.

Table 8 Feature films broadcast[1] on terrestrial television 2018

	Number of films broadcast	Number of UK films broadcast[1]	UK films as % of total	Number of recent UK films broadcast[2]	Recent UK films as % of total films broadcast
BBC One	154	47	30.5	38	24.7
BBC Two	276	121	43.8	62	22.5
ITV	161	43	26,7	18	11.2
Channel 4	412	91	22.1	75	18.2
Channel 5	295	57	19.3	32	10.6
Total	**1,298**	**359**	**27.7**	**225**	**17.3**

Source: BARB, BFI RSU analysis

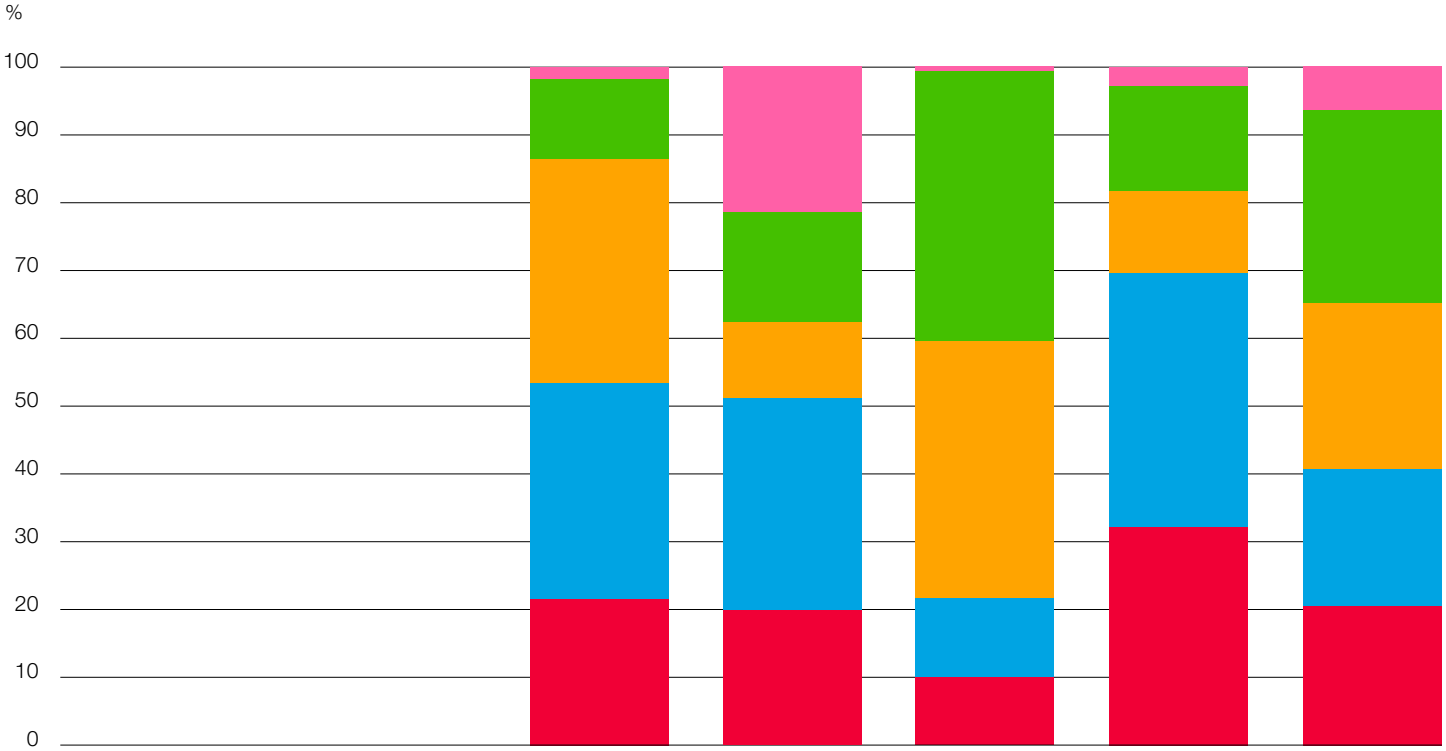
[1] Includes repeat broadcasts of individual titles.

[2] A recent film is one which has been theatrically released, or intended for release, in the UK since 2009.

Figure 10 shows the percentage of films broadcast on the terrestrial channels in 2018 across five age-range categories. (For this analysis, the age of a film is determined by its year of release in the UK, not production year.)

Recent titles made up a larger share of Channel 4's film output than for the other terrestrial channels. Just under one third (32%) of the films shown by Channel 4 in 2018 were less than five years old, while 69% of its films were less than 10 years old. At the other end of the scale, 40% of the films shown on ITV had been released theatrically at least 20 years before 2018, while 21% of the films screened on BBC Two had been released at least 50 years before.

Figure 10 Percentage of feature film by age on terrestrial channels, 2018



	BBC One	BBC Two	ITV	Channel 4	Channel 5
Less than 5 years	21.4	19.9	9.9	32.0	20.3
5-9 years	31.8	31.2	11.8	37.4	20.3
10-19 years	33.1	11.2	37.9	12.1	24.4
20-49 years	11.7	16.3	39.8	15.5	28.5
50+ years	1.9	21.4	0.6	2.9	6.4

Source: BARB, BFI RSU analysis

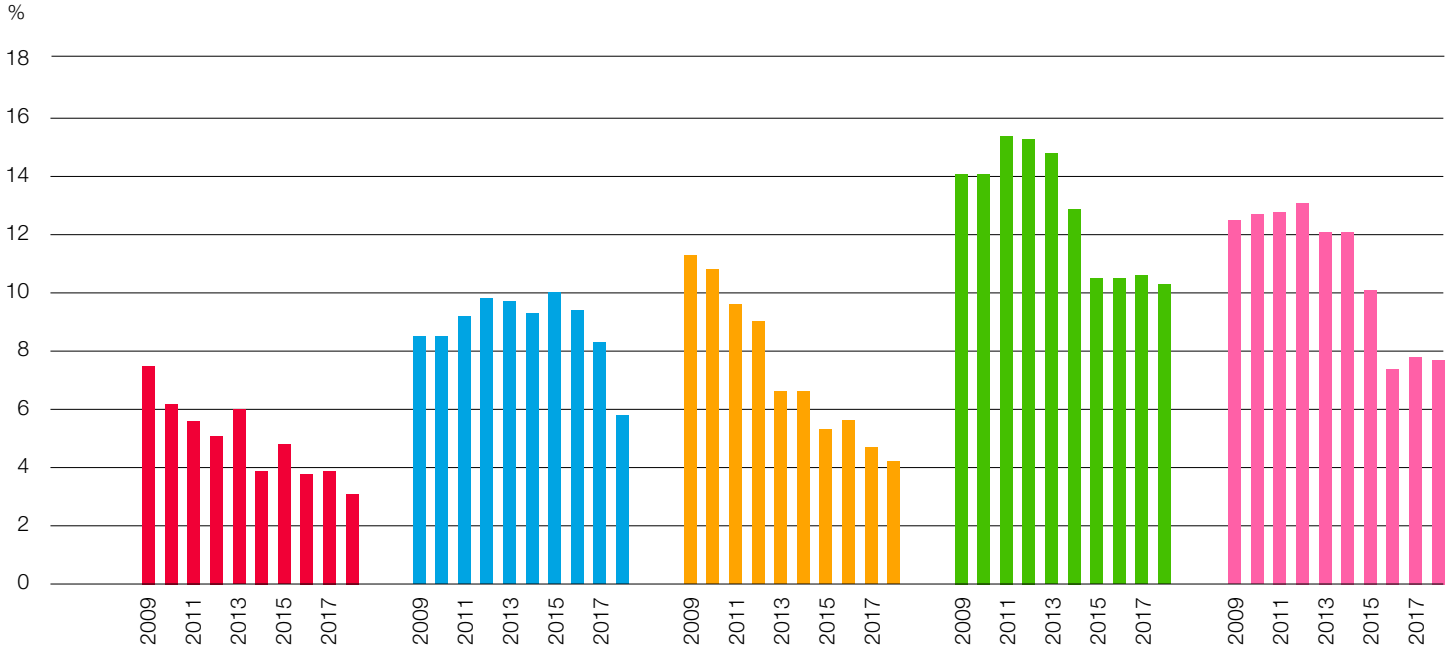
FILM ON TERRESTRIAL TELEVISION, 2009-2018

Figure 11 shows the share of total programming hours dedicated to feature film across the terrestrial channels between 2009 and 2018. (In previous editions of the Yearbook, we have reported data for peak-time film transmissions only. However, as many of the most popular films in a given year are shown during holiday or weekend day-time hours, we have extended coverage to include the entire broadcast day as defined by BARB: 06:00 to 27:00 hours.)

The percentage of programming hours dedicated to feature film varied widely across the terrestrial channels over the 10-year period. In most years, Channel 4 and Channel 5 had the highest share of film hours in their schedules, while BBC One consistently had the lowest. In 2018, feature film made up over 10% of Channel 4's output and 8% of Channel 5's, compared with 3% for BBC One.

Across the period, there has been an overall decline in the proportion of total programming time allotted to film, with the average share for terrestrial channels as a whole decreasing from 11% in 2009 to 6% in 2018.

Figure 11 Film as a percentage of total programming hours by channel, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
BBC One	7.5	6.2	5.6	5.1	6.0	3.9	4.8	3.8	3.9	3.1
BBC Two	8.5	8.5	9.2	9.8	9.7	9.3	10.0	9.4	8.3	5.8
ITV	11.3	10.8	9.6	9.0	6.6	6.6	5.3	5.6	4.7	4.2
Channel 4	14.1	14.1	15.4	15.3	14.8	12.9	10.5	10.5	10.6	10.3
Channel 5	12.5	12.7	12.8	13.1	12.1	12.1	10.1	7.4	7.8	7.7

Source: BARB, BFI RSU analysis

Notes:

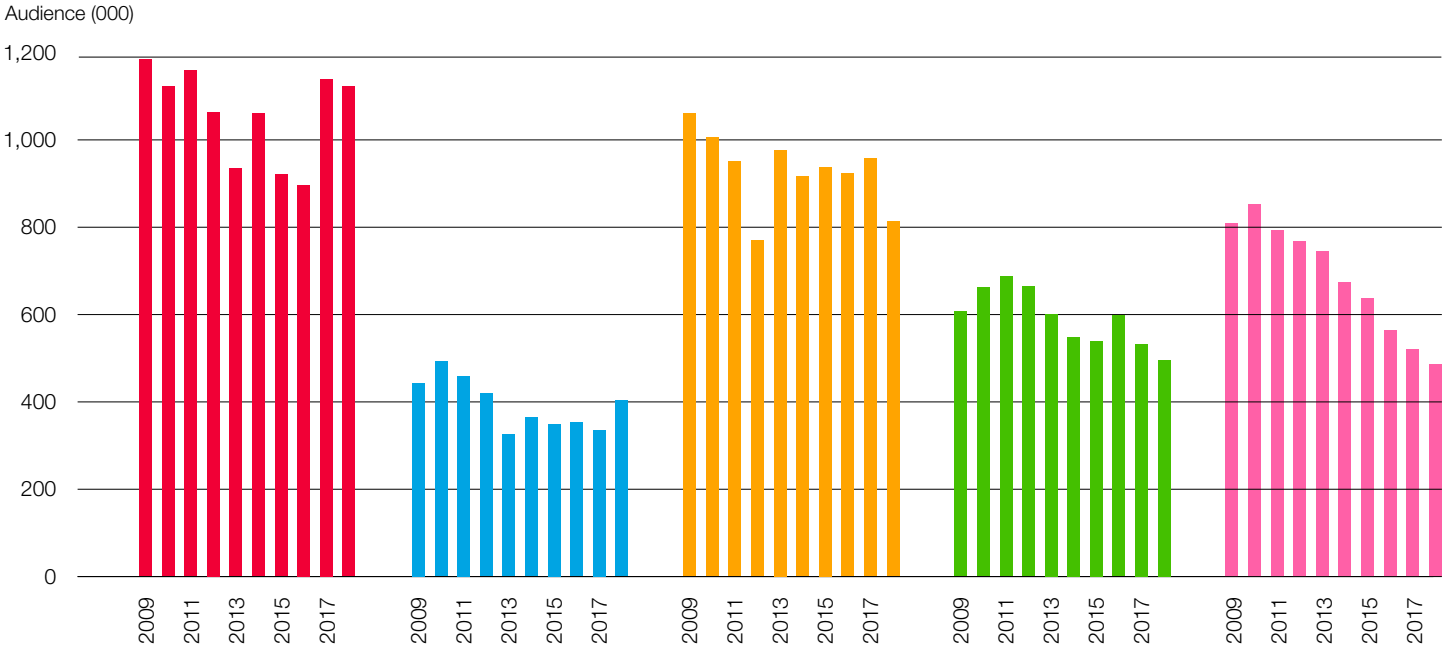
Programming hours: 06:00-27:00 (For reporting purposes the BARB broadcast day runs for 24 hours from 6:00. Times beyond 24:59 are reported using a thirty hour clock.)

Film duration includes commercial breaks and promotions within broadcast on commercial channels.

THE AUDIENCE FOR FILM ON TERRESTRIAL TELEVISION, 2009-2018

Figure 12 shows the average audience for feature film across all programming hours on the five terrestrial channels between 2009 and 2018. The general trend across the channels has been a gradual year-on-year decrease in the average viewership, which is partly attributable to the growth of competition from on-demand services during the period. BBC One and ITV had the highest average film audiences throughout the decade, while BBC Two had the lowest. The average audience for feature film transmissions in 2018 was 1.1 million on BBC One, 800,000 on ITV, 500,000 on both Channel 4 and Channel 5, and 400,000 on BBC Two.

Figure 12 Average audience for film, 2009-2018



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
BBC One	1,183	1,121	1,158	1,063	933	1,059	920	896	1,139	1,122
BBC Two	442	492	458	419	325	364	349	352	335	403
ITV	1,059	1,005	950	769	976	915	937	922	956	812
Channel 4	606	661	686	663	600	548	539	597	532	495
Channel 5	810	852	793	769	745	675	637	565	520	487

Source: BARB, BFI RSU analysis

See notes to Figure 11.

TOP FILMS ON TERRESTRIAL TELEVISION

The most popular film on terrestrial television in 2018 was the 1964 Disney classic *Mary Poppins*, which attracted an average audience of 4.7 million viewers for its Christmas Eve screening on BBC One (Table 9). This is the first time since our records began that a non-network premiere was the most viewed film transmission on terrestrial channels. In total, seven of the top 10 films were premieres, the most popular of which was *Maleficent* which achieved 4.2 million viewers for its New Year's Day transmission on BBC One.

Four films in the top 10 achieved audiences of more than 4 million viewers compared with three in 2017. Five of the top 10 titles in 2018 were UK qualifying films: three were US studio-backed productions and two were UK independent productions.

Table 9 Top 10 films[1] on terrestrial television, 2018

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Mary Poppins	BBC One	USA	1964	4.7
2	Maleficent	BBC One	UK/USA	2014	4.2
3	SPECTRE	ITV	UK/USA	2015	4.1
4	Ant-Man	BBC One	UK/USA	2015	4.1
5	The BFG	BBC One	USA	2016	3.9
6	Brooklyn	BBC One	UK/Can/Ire	2015	3.9
7	Elf	ITV	USA	2003	3.3
8	Florence Foster Jenkins	BBC One	UK/Fra	2016	3.0
9	Home Alone 2: Lost in New York	Channel 4	USA	1992	2.9
10	The Good Dinosaur	BBC One	USA	2015	2.6

Source: BARB, RSU Analysis

[1] Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

Image: *Florence Foster Jenkins* courtesy of Pathé UK

The top 10 most popular UK qualifying films on terrestrial television in 2018 include five titles which also appear in the year's overall top 10 films. The chart is headed by *Maleficent*, one of eight network premieres in the top 10 (Table 10). In recent years this list has been dominated by films from the Harry Potter franchise but the 2018 chart includes only one title from the series, *Harry Potter and the Chamber of Secrets*. There are two independent UK films in the list: *Brooklyn* and *Florence Foster Jenkins*. Both of these titles were backed by BBC Films and both received network premieres on BBC One.

Table 10 Top 10 UK qualifying films[1] on terrestrial television, 2018

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Maleficent	BBC One	UK/USA	2014	4.2
2	SPECTRE	ITV	UK/USA	2015	4.1
3	Ant-Man	BBC One	UK/USA	2015	4.1
4	Brooklyn	BBC One	UK/Can/Ire	2015	3.9
5	Florence Foster Jenkins	BBC One	UK/Fra	2016	3.0
6	Mission: Impossible - Rogue Nation	Channel 4	UK/USA	2015	2.2
7	Star Wars: Episode VII: The Force Awakens	ITV	UK/USA	2015	2.2
8	Harry Potter and the Chamber of Secrets	ITV	UK/USA	2002	2.0
9	Wallace and Gromit: The Curse of the Were-Rabbit	BBC One	UK/USA	2005	2.0
10	Kingsman: The Secret Service	Channel 4	UK/USA	2015	1.9

Source: BARB, RSU analysis

[1] Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

The network premiere of *Brooklyn* on BBC One attracted the highest single average audience for a UK independent film on terrestrial television in 2018, with 3.9 million viewers tuning in for its broadcast in mid-March (Table 11). In total, seven of the top 10 films were network premieres, and five of the top 10 were backed by UK broadcasters (four were BBC Films titles and one was a Film4 title).

Table 11 Top 10 UK independent films[1] on terrestrial television, 2018

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Brooklyn	BBC One	UK/Can/Ire	2015	3.9
2	Florence Foster Jenkins	BBC One	UK/Fra	2016	3.0
3	Dad's Army	ITV	UK/USA#	2016	1.9
4	Eddie the Eagle	Channel 4	UK/USA/Ger#	2016	1.9
5	Spooks: The Greater Good	BBC One	UK	2015	1.8
6	Suffragette	Channel 4	UK/Fra	2015	1.8
7	Philomena	BBC Two	UK/Fra	2013	1.7
8	Paddington	Channel 4	UK/Fra	2014	1.7
9	Chitty Chitty Bang Bang	Channel 5	UK/USA#	1968	1.6
10	Swallows and Amazons	BBC One	UK	2016	1.5

Source: BARB

[1] Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

Film made with independent (non-studio) US support or with the independent arm of a US studio.

FILM ON MULTI-CHANNEL TELEVISION

In 2018, multi-channel television (Freeview/satellite/cable) accounted for 62% of all viewings of film on television. For the purposes of this section, multi-channel television includes all free-to-air and paid (non-film subscription) channels, with the exclusion of the traditional terrestrial channels.

Table 12 shows the number of film transmissions, the average film audience, the top film transmission and the audience for the top film, for channels which broadcast 30 or more feature films in 2018. After dedicated film channels Talking Pictures (3,483 transmissions), TCM (2,992), Film4 (2,804), Sony Max (2,211) and Colors Cineplex (1,898), the greatest numbers of titles were screened by London Live and 5Spike with 1,713 and 1,632 transmissions respectively. However, the largest average audiences for film were generated by ITV2 (368,000) and E4 (258,000).

In total, 5,385 unique film titles were screened on multi-channel television in 2018 across 30,684 slots, compared with 5,147 unique titles across 27,747 slots in 2017.

Table 12 Feature film on multi-channel television, 2018

Channel	Number of films broadcast	Average audience for all films (000)	Top film transmission	Audience for top film (000) *
Talking Pictures	3,483	33	Twice Round the Daffodils	174
TCM	2,992	18	The Goonies	114
Film4	2,804	167	Kingsman: The Secret Service	1,015
Sony MAX	2,211	2	Tiger Zinda Hai	71
Colors Cineplex	1,898	2	Padmaawat	61
London Live	1,713	6	The Medusa Touch	77
5Spike	1,632	71	The Guns of Navarone	353
5STAR	1,511	95	Batman Begins	372
ITV4	1,460	148	Battle of Britain	580
Zee Cinema	1,294	2	Karma (1986)	28
Syfy	1,129	37	Matilda	191
SAB TV	1,020	2	Ek Tha Tiger	46
ITV2	995	368	Jurassic World	1,438
Paramount Network	792	28	War of the Worlds (2005)	208
Star Gold	583	2	Housefull 2	34
Comedy Central	399	75	Pirates of the Caribbean: The Curse of the Black Pearl	226
Horror Channel	366	52	Hannibal Rising	186
E4	323	258	Captain America: The First Avenger	694
Zing	303	2	Hum Saath Saath Hain	14
AMC	294	1	The Duff	28
&TV	187	3	Dil	34
Universal	162	64	How the Grinch Stole Christmas	184
Comedy Central Extra	143	11	Kevin & Perry Go Large	60
ITV3	124	185	The Wizard of Oz	533
Zee TV	116	4	Tamasha	23
Sky One	115	143	The Greatest Showman	1,290

Source: BARB, RSU analysis

Notes:

Excludes channels with <30 separate film titles broadcast during 2018.

* Film with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

As Table 13 shows, *Jurassic World* achieved the year's highest average audience for a single transmission across multi-channel television in 2018, with 1.4 million viewers for its Christmas Day broadcast on ITV2. (The film was also the year's most viewed film overall on the platform with a combined audience of 9.4 million viewers across six transmissions.) As in previous years, titles shown on ITV2 dominate the chart of most popular multi-channel film broadcasts, including four outings from two of the broadcaster's schedule stalwarts, the James Bond and Star Wars franchises.

Five of the top 10 films were UK qualifying features, and all were produced in collaboration with the major US studios.

Table 13 Top 10 films[1] on multi-channel television, 2018

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Jurassic World	ITV2	USA	2015	1.4
2	Elf	ITV2	USA	2003	1.4
3	The Greatest Showman	Sky One	USA	2017	1.3
4	Star Wars: Episode IV - A New Hope	ITV2	UK/USA	1977	1.1
5	SPECTRE	ITV2	UK/USA	2015	1.0
6	Kingsman: The Secret Service	Film4	UK/USA	2014	1.0
7	How the Grinch Stole Christmas	ITV2	USA	2000	1.0
8	Mechanic: Resurrection	Film4	Fra/USA	2016	0.9
9	Skyfall	ITV2	UK/USA	2012	0.9
10	Star Wars: Episode VI - Return of the Jedi	ITV2	UK/USA	1983	0.9

Source: BARB, BFI RSU analysis

[1] Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

In 2018, pay TV film channels accounted for 14% of all viewings of film on television. Table 14 shows the top 10 films, ranked by highest average audience for a single transmission on the additional TV film channels operated by Sky in 2018. These channels broadcast 1,627 unique titles across 36,050 slots during the year, with an average audience of 10,000. In 2017, there were 1,623 unique titles across 44,780 slots with an average audience of 12,000.

All of the top 10 films were Sky Cinema Premiere transmissions. *Jumanji: Welcome to the Jungle* achieved the highest single audience with 1.9 million viewers for a daytime slot in August. There are two UK qualifying films in the list: the UK independent film *Monster Family* and the studio-backed title *Justice League*. As in 2017, the Disney animation *Moana* (which does not feature in the list) gained the largest cumulative audience on pay TV, with 5.7 million viewers over 77 transmissions on Sky Cinema Disney.

Table 14 Top 10 films[1] on pay TV film channels, 2018

	Title	Country of origin	Year of theatrical release	Audience (million)
1	Jumanji: Welcome to the Jungle	USA	2017	1.9
2	The Greatest Showman	USA	2017	1.7
3	Monster Family	UK/Ger	2018	1.7
4	Peter Rabbit	Aus/USA	2018	1.6
5	Despicable Me 3	USA/Fra	2017	1.6
6	Thor: Ragnarok	USA	2017	1.4
7	Kong: Skull Island	USA/Chn	2017	1.4
8	Black Panther	USA	2018	1.2
9	Justice League	UK/USA/Can	2017	1.2
10	The Emoji Movie	USA	2017	1.2

Source: BARB, BFI RSU Analysis

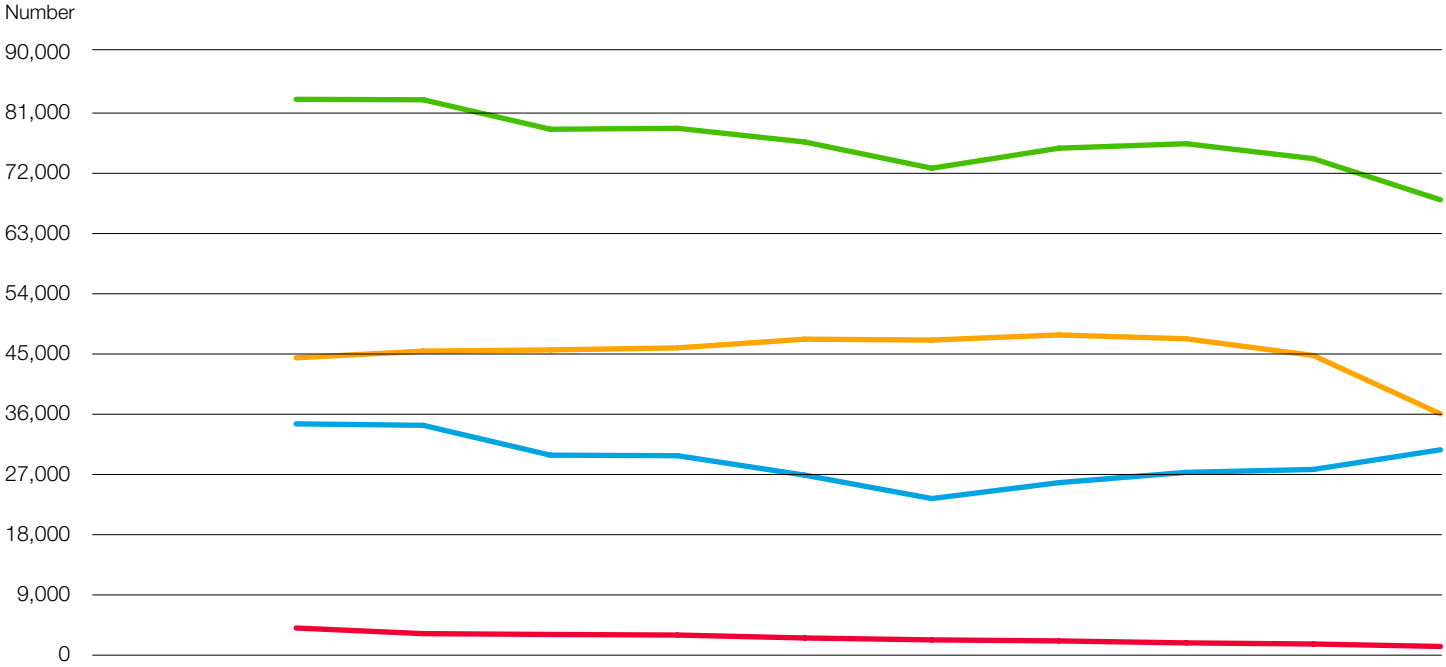
[1] Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

Image: *Jumanji: Welcome to the Jungle* ©2016 CTMG. All Rights Reserved

FILM BROADCASTS AND AUDIENCE FOR FILM ON ALL TELEVISION CHANNELS, 2009-2018

As Figure 13 shows, fewer films were shown on UK television (not including pay-per-view) in 2018 than in any other year in the period, 2009-2018. There were a total of 68,304 film transmissions in 2018, down from 74,191 in 2017, while the number of unique film titles dropped from 7,151 in 2017 to 7,100. The greatest number of unique film titles available to audiences in 2018 was shown on multi-channel television (5,385). Pay TV channels showed 1,623 unique titles while terrestrial channels screened 1,093 titles. (The overall total for 2018 is less than the sum of these categories, as some titles were shown on multiple platforms across the year.)

Figure 13 Total number of film transmissions on television (except pay-per-view), 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Terrestrial	4,055	3,216	3,092	3,004	2,566	2,280	2,128	1,832	1,666	1,298
Pay TV film channels	44,434	45,430	45,611	45,913	47,216	47,081	47,850	47,274	44,778	36,052
Other multi-channel	34,562	34,342	29,883	29,804	26,896	23,402	25,777	27,315	27,747	30,684
Total	**83,051**	**82,988**	**78,586**	**78,721**	**76,678**	**72,763**	**75,755**	**76,421**	**74,191**	**68,034**

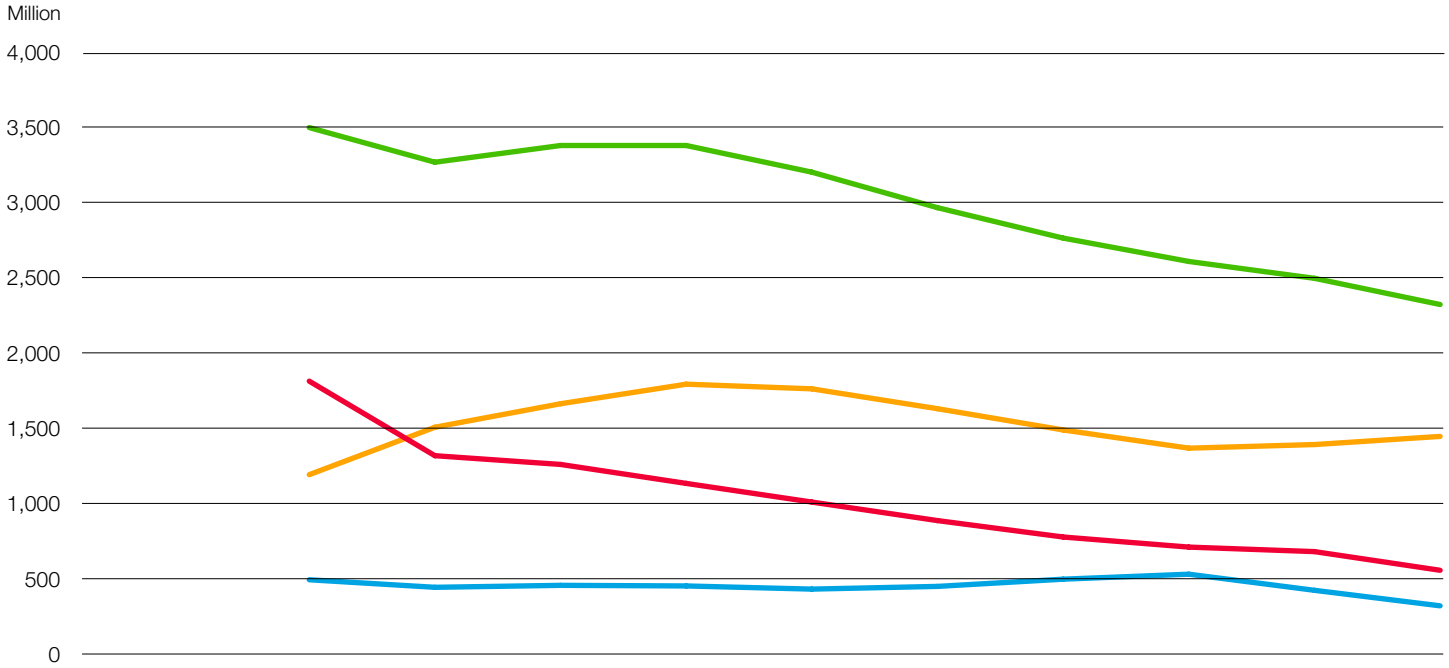
Source: BFI RSU Analysis, BARB

Note: Figures for 2009-2017 have been revised since publication of the 2018 Statistical Yearbook.

In 2018, there were 2.3 billion viewings of film on television in the UK (not including pay-per-view) which represents approximately 53 film viewings per person per year, down from 58 in 2017 (Figure 14). In line with the overall trend for the 10 years shown in the chart, in 2018, audience numbers increased for multi-channel television platforms compared with 2017, but decreased for terrestrial and pay TV channels. Multi-channel film broadcasts attracted the largest audience overall in 2018 (1.4 billion viewers) while pay TV channels dedicated to film had the smallest total audience with 320 million viewers.

Across the 10-year period 2009-2018, the audience for film on television declined by 34%.

Figure 14 Total audience for film on television (except pay-per-view), 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Terrestrial	1,812	1,317	1,259	1,133	1,009	886	777	710	680	556
Pay TV film channels	493	443	456	452	431	449	497	530	423	320
Other multi-channel	1,191	1,506	1,662	1,792	1,761	1,629	1,488	1,367	1,391	1,445
Total	**3,496**	**3,266**	**3,377**	**3,377**	**3,200**	**2,964**	**2,762**	**2,607**	**2,495**	**2,321**

Source: BARB, BFI RSU analysis

Notes:

Audience numbers are based on total viewing sessions of 30 minutes+ of consecutive film watching.

Figures for 2009-2017 have been revised since publication of the 2018 Statistical Yearbook.

Figures may not sum to totals due to rounding.

THE VALUE OF FEATURE FILM TO BROADCASTERS

We estimate the value of feature film to UK broadcasters to have been approximately £894 million in 2018, up slightly from £880 million in 2017 (the 2017 value has been updated since publication of the 2018 Statistical Yearbook). Of this it is estimated that £134 million is attributable to UK films (£142 million in 2017). Television values are based on a model developed by Ampere Analysis. Values are estimated by dividing broadcaster revenues (from subscriptions, advertising spend and licence fee share) by the percentage of content spend attributed to film.

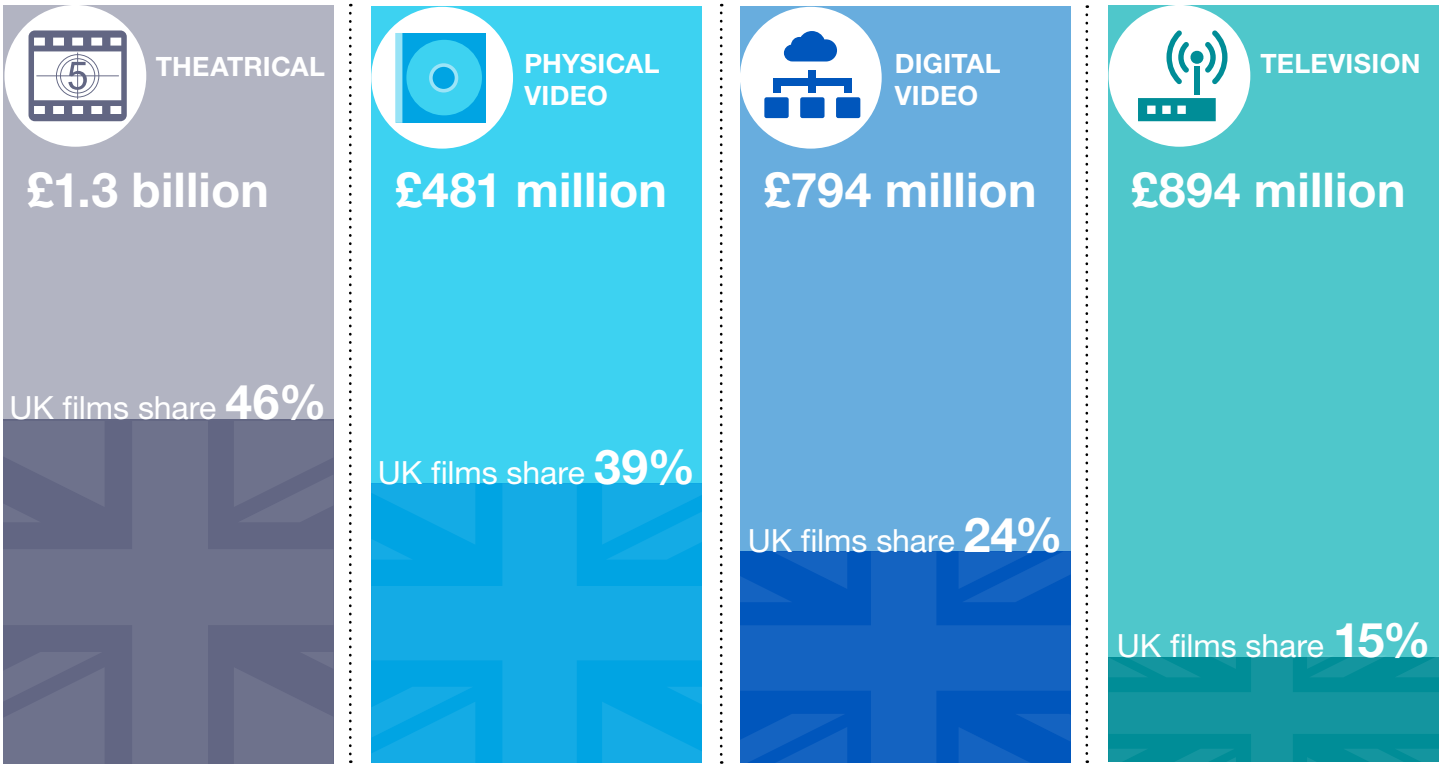
THE UK FILM MARKET AS A WHOLE

Image: *Journey's End* courtesy of Lionsgate Films

Facts in focus

UK FILMED ENTERTAINMENT MARKET REVENUES 2018

Total revenues **£3.5 billion**



FIVE LARGEST FILMED ENTERTAINMENT MARKETS WORLDWIDE 2018[1]

USA	US$32.3 billion
China	US$15.8 billion
Japan	US$7.9 billion
UK	US$4.7 billion
Germany	US$3.4 billion

PROJECTED FIVE LARGEST FILMED ENTERTAINMENT MARKETS WORLDWIDE 2023[1]

USA	US$38.8 billion
China	US$30.3 billion
Japan	US$9.5 billion
UK	US$5.2 billion
India	US$4.3 billion

[1]PwC, *Global Entertainment & Media Outlook* 2019-2023, www.pwc.com/outlook

The UK film market as a whole

UK FILMED ENTERTAINMENT MARKET REVENUES

In 2018, theatrical revenues were the most significant component of the film value chain in the UK. As Table 1 shows, the box office accounted for 37% of total revenues (£1.3 billion) while digital video accounted for 23% (£794 million). Theatrical revenues were the same in 2017 at £1.3 billion (a 38% share of the UK market) while digital video grossed £681 million (20%). Total television revenues represented 26% of the market in 2018 (£894 million), the same share as in 2017 (£880 million) but much of this accrued to the television industry rather than to the suppliers of film. (The pay TV market saw an increase in film-related revenues between 2017 and 2018, while those of terrestrial and multi-channel television declined.) The physical video sector recorded the most significant loss in market share in 2018, falling from 16% in 2017 (£540 million) to just 14% (£481 million).

Gross revenues for UK films in 2018 were estimated to be £1.1 billion, with the share for British films highest in the theatrical market (46%) and lowest in the pay TV market (13%). Overall, the share of revenues attributed to UK films rose from 30% in 2017 to 32% in 2018.

Table 1 UK filmed entertainment market, 2017 and 2018

	2017			2018		
	Total gross value (£ million)	Attributable to UK films (£ million)	UK film as % of total gross	Total gross value (£ million)	Attributable to UK films (£ million)	UK film as % of total gross
Theatrical	1,279	515	40	1,282	591	46
Physical video rental	37	13	35	30	10	33
Physical video retail	503	171	34	451	176	39
Digital video	681	158	23	794	192	24
Pay TV	661	98	15	684	92	13
Terrestrial and multi-channel TV	219	44	18	210	42	20
Total	**3,380**	**999**	**30**	**3,451**	**1,103**	**32**

Source: comScore, BASE, Official Charts Company, Ampere, ONS, IHS, BFI RSU analysis

Notes:

'Theatrical' is the total gross UK theatrical revenue (including VAT) in the calendar years 2017 and 2018 for all films exhibited in the UK. See Film at the cinema chapter. Figures for 2017 have been revised since publication of the 2018 Statistical Yearbook.

'Physical video rental' is the total revenue from physical video rental (DVD, Blu-ray, etc) transactions in the calendar years 2017 and 2018. See Home entertainment chapter.

'Physical video retail' is the total revenue from physical video retail transactions in the calendar years 2017 and 2018. See Home entertainment chapter.

'Digital video' revenues are derived from IHS estimates of the combined size of the television and internet-based markets. UK share is based on an estimate derived from knowledge of UK film share in the pay TV and video markets.

The television values are retail equivalent values calculated from the dataset of films shown on UK television. Calculations are based on a methodology developed by Ampere Analysis: values are estimated by dividing broadcaster revenues (from subscriptions, advertising spend and licence fee share) by the percentage of content spend attributed to film. Television values cover terrestrial, pay TV and other multi-channel TV. See Home entertainment chapter. Figures for 2017 have been revised since publication of the 2018 Statistical Yearbook.

The above values are gross values and include distributor and exhibitor margins, VAT, prints and advertising costs, DVD/video retail margins, broadcaster and multi-channel TV operator margins in addition to net returns to the film production sector and film investors.

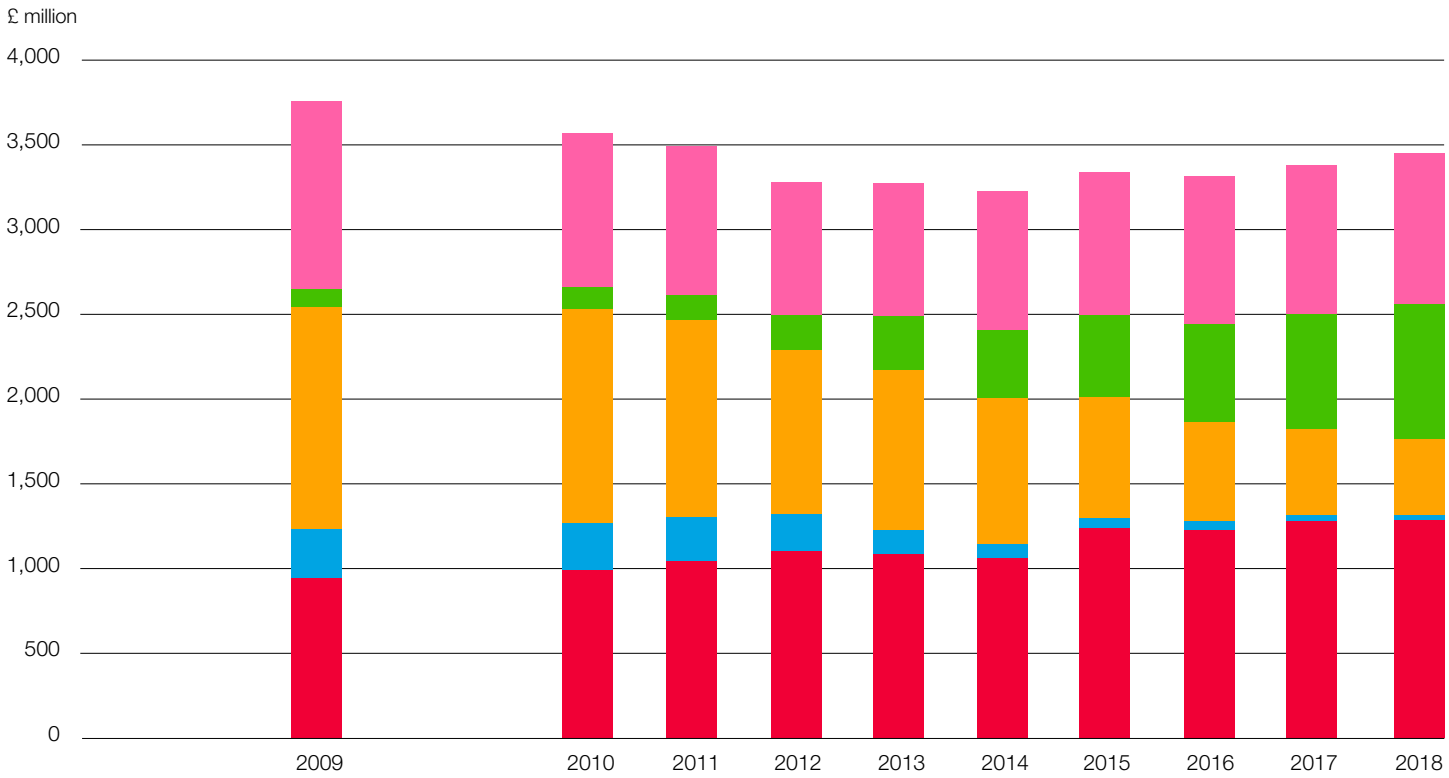
The revenues shown here are revenues earned by film in the UK market, whether UK or foreign films. The table does not include export revenues for the UK film industry. See UK film economy chapter for UK film export revenues.

THE EVOLUTION OF UK FILM REVENUES, 2009-2018

Figure 1 shows aggregate film revenues for the 10-year period 2009-2018. (It should be noted that the values reported for film on television for 2009 and from 2010 onwards have been calculated on the basis of different methodologies so are not directly comparable.)

While total film revenues have fluctuated over the period, the data show a consistent decline in the value of the physical video rental and retail market. The combined value of physical video sales and rentals fell from £1.6 billion in 2009 to less than £0.5 billion in 2018. At the same time, theatrical and on-demand revenues have increased. The rise in the value of the digital video market over the period has been significant. Digital video revenues represented 3% of the overall film value chain in 2009 but accounted for 23% in 2018.

Figure 1 Gross film revenues, all platforms, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Theatrical	944	988	1,040	1,099	1,083	1,058	1,236	1,228	1,279	1,282
Physical video rental	285	278	262	221	146	87	62	48	37	30
Physical video retail	1,311	1,267	1,165	968	940	861	712	589	503	451
Digital video	110	127	142	208	320	397	487	578	681	794
Film on television	1,108	909	882	783	786	821	841	872	880	894
Total	**3,758**	**3,569**	**3,491**	**3,279**	**3,275**	**3,224**	**3,338**	**3,315**	**3,380**	**3,451**

Source: comScore, BASE, Official Charts Company, IHS, Ampere, BFI RSU analysis

Notes:

'Film on television' covers terrestrial, pay TV and other multi-channel TV. On-demand television-based services are included within the digital video total.

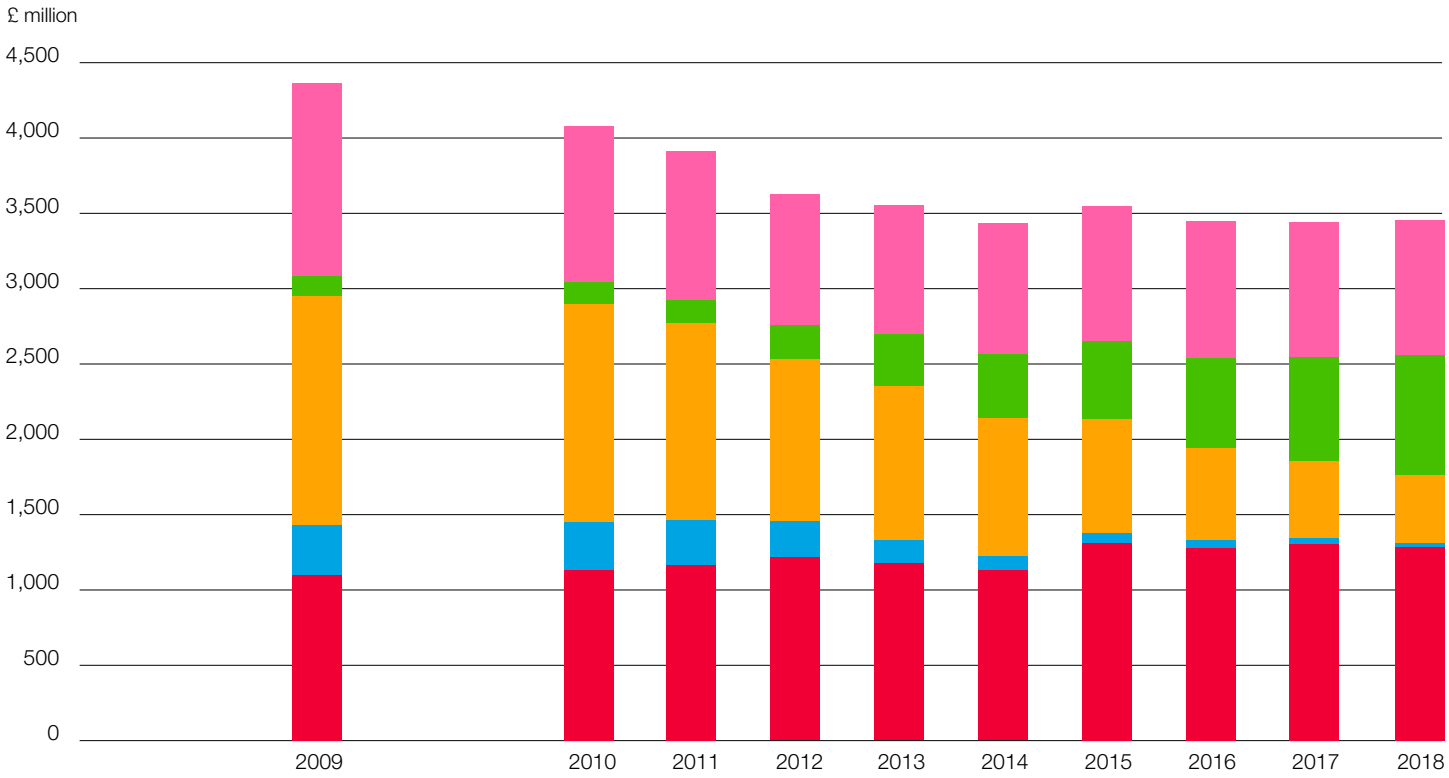
The gap in the trend indicates that data are not entirely comparable as the revenues for film on television for 2009 are calculated on the basis of a different methodology than those from 2010 onwards.

Figures for film on television for the period 2010-2017 have been revised since publication of the 2018 Statistical Yearbook.

Figures may not sum to totals due to rounding.

The revenues shown in Figure 1 are the actual figures; if adjusted for inflation (Figure 2), the decline in value from the start of the period is clear, with the 2018 market down 21% from the peak in 2009. (Revenues in 2018 were 15% lower than in 2010.) In real terms, film revenues have plateaued since 2013.

Figure 2 Gross inflation-adjusted film revenues, all platforms, 2009-2018 (expressed in 2018 pounds)



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Theatrical	1,096	1,129	1,166	1,214	1,174	1,128	1,312	1,277	1,302	1,282
Physical video rental	331	318	294	244	158	93	66	50	38	30
Physical video retail	1,522	1,448	1,307	1,069	1,019	918	756	612	512	451
Digital video	128	145	159	230	347	423	517	601	693	794
Film on television	1,286	1,039	989	865	852	875	892	906	895	894
Total	**4,362**	**4,080**	**3,915**	**3,621**	**3,550**	**3,437**	**3,542**	**3,447**	**3,440**	**3,451**

Source: comScore, BASE, Official Charts Company, IHS, Ampere, BFI RSU analysis

Notes:

Actual revenues deflated by the UK GDP deflator, which can be found https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2019-spring-statement.

See notes to Figure 1.

Figures may not sum to totals due to rounding.

THE UK FILM MARKET IN THE GLOBAL CONTEXT

According to PwC's Global Entertainment & Media Outlook 2019-2023, in 2018 the UK had the fourth largest filmed entertainment market in the world after the USA, China and Japan. The USA accounted for 32% of the world market, with China accounting for 16% and Japan for 8%. The UK accounted for 5% of the market. The next largest countries in terms of market share were Germany and Canada (both with 3.4%) and France (2.8%).

Table 2 Filmed entertainment revenues by country/region, 2018

Country/region	US$ million	%
USA	32,339	32.4
China	15,827	15.8
Japan	7,930	7.9
UK	4,727	4.7
Germany	3,393	3.4
Canada	3,367	3.4
France	2,806	2.8
Other Asia Pacific	2,780	2.8
South Korea	2,615	2.6
Australia	2,577	2.6
India	2,342	2.3
Brazil	1,849	1.9
Mexico	1,705	1.7
Taiwan	1,527	1.5
Other Central & Eastern Europe	1,495	1.5
Middle East & Africa	1,487	1.5
Italy	1,467	1.5
Other Western Europe	1,339	1.3
Other Latin America	1,171	1.2
Russia	1,010	1.0
Spain	918	0.9
Netherlands	847	0.8
Poland	768	0.8
Sweden	752	0.8
UAE	636	0.6
Denmark	599	0.6
Hong Kong	575	0.6
Norway	558	0.6
Belgium	542	0.5
Total	**99,948**	**100.0**

Source: PwC, Global Entertainment & Media Outlook 2019-2023, www.pwc.com/outlook

Notes:

Information contained in this table was taken from the Cinema segment and the Physical Video and Through TV subscription sections of the Traditional TV and Home Video segment of the PwC Global Entertainment & Media Outlook, 2019-2023 www.pwc.com/outlook, however, some calculations and categorisation of regions are our own.

'Cinema' consists of two out-of-home components: consumer spending at the box office for theatrical motion pictures and advertising spend at the cinema, including on-screen advertisements before the movie.

'Traditional TV and Home Video' comprises consumer spending on basic and premium TV subscriptions; consumer spending on public licence fees where applicable; physical home video revenue; and on-demand video services via a TV subscription provider. This revenue is both digital and non-digital. Only revenue from physical home video and revenue from on-demand video services via a TV subscription are used from this segment. ('Physical Video' covers films, TV programming and other premium video content. Revenue comprises sell-through and rental of physical home video. 'Through TV subscription' comprises revenue from both Video on Demand (VoD) and pay-per-view (PPV) services provided by a TV provider – including cable, satellite and telco providers – as part of a TV subscription package, or as an enhancement to that core package.)

Other Asia Pacific comprises Indonesia, Malaysia, New Zealand, Pakistan, Philippines, Singapore, Thailand and Vietnam. Other Central & Eastern Europe comprises Austria, Czech Republic, Hungary, Romania and Turkey. Middle East & Africa comprises Algeria, Bahrain, Egypt, Israel, Jordan, Kenya, Kuwait, Lebanon, Morocco, Nigeria, Oman, Qatar, Saudi Arabia and South Africa. Other Western Europe comprises Finland, Greece, Republic of Ireland and Portugal. Other Latin America comprises Argentina, Chile, Colombia, Peru and Venezuela.Other Latin America comprises Argentina, Chile, Colombia, Peru and Venezuela.

According to PwC forecasts, the USA, China, Japan and UK will remain the world's top four markets for filmed entertainment into 2023, with India rising to fifth place (up 82% between 2018 and 2023) due to substantial growth in its digital and box office revenues. The most sizeable expansion is predicted in China, however, with a 91% increase in market value over the period (Table 3).

Table 3 Filmed entertainment revenues by country/region, forecast for 2023

Country/region	US$ million	%	% predicted growth 2018-2023
USA	38,759	28.3	19.9
China	30,264	22.1	91.2
Japan	9,496	6.9	19.8
UK	5,233	3.8	10.7
India	4,257	3.1	81.8
Canada	4,200	3.1	24.7
Other Asia Pacific	4,190	3.1	50.7
South Korea	3,712	2.7	41.9
Germany	3,503	2.6	3.2
France	3,317	2.4	18.2
Australia	3,255	2.4	26.3
Brazil	2,680	2.0	44.9
Mexico	2,597	1.9	52.3
Middle East & Africa	2,301	1.7	54.7
Other Central & Eastern Europe	2,065	1.5	38.1
Other Latin America	1,959	1.4	67.3
Italy	1,955	1.4	33.3
Taiwan	1,740	1.3	13.9
Other Western Europe	1,684	1.2	25.8
Russia	1,332	1.0	31.8
Spain	1,220	0.9	33.0
Poland	1,146	0.8	49.2
Netherlands	1,104	0.8	30.4
Sweden	973	0.7	29.4
UAE	918	0.7	44.4
Denmark	812	0.6	35.6
Norway	800	0.6	43.3
Hong Kong	760	0.6	32.2
Belgium	712	0.5	31.3
Total	**136,943**	**100.0**	**37.0**

Source: PwC, Global Entertainment & Media Outlook 2019-2023, www.pwc.com/outlook

Notes:

Information contained in this table was taken from the Cinema segment and the Physical Video and Through TV subscription sections of the Traditional TV and Home Video segment of the PwC Global Entertainment & Media Outlook, 2019-2023, www.pwc.com/outlook, however, some calculations and categorisation of regions are our own.

Figures/percentages may not sum to totals due to rounding.

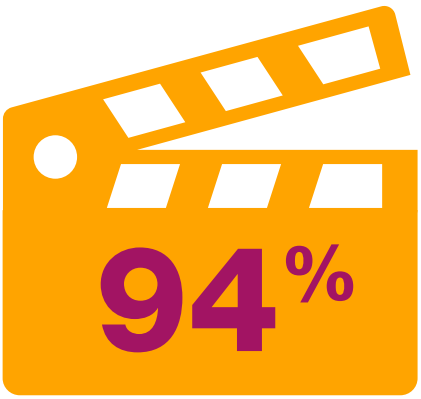
See notes to Table 2.

AUDIENCES

Image: *Robin Hood* courtesy of Lionsgate Films

Facts in focus

AUDIENCE FOR FILM IN THE UK



of UK adults watch a film or movie at least **once** every **six months**

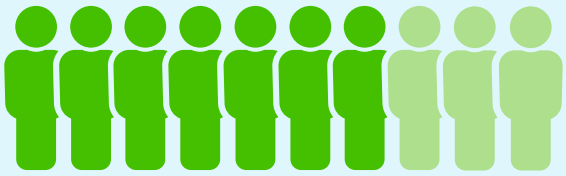
CINEMA AUDIENCE BY AGE

% of average cinema audience

Young cinema-goers outweigh older adults by **2** to **1**

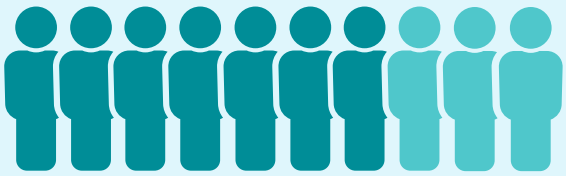
FILM PREFERENCE BY AGE

Youngest skewing title at cinema



7 out of **10** cinema-goers who saw US low-budget horror Truth or Dare were aged 15-24

Oldest skewing title at cinema

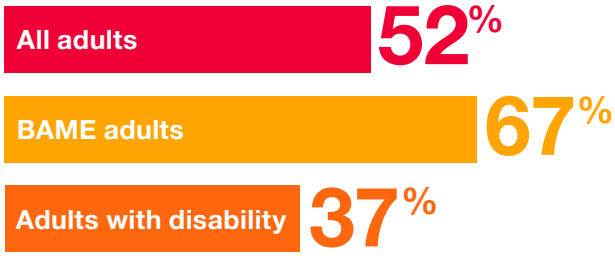


7 out of **10** cinema-goers who saw UK independent film On Chesil Beach were aged 55+

CINEMA AUDIENCE DIVERSITY

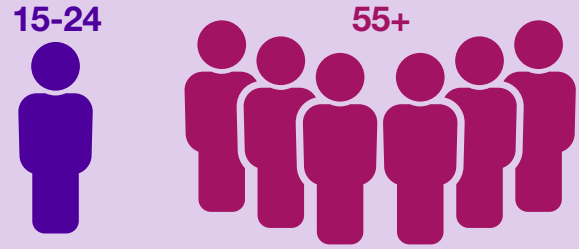
Black and minority ethnic (BAME) adults over-index vs all adults as cinema-goers while adults with a disability under-index

% of group who watch film at the cinema



TELEVISION AUDIENCE FOR FILM BY AGE

% of average television audience for film



Older adults outweigh younger viewers by **6** to **1**

AGE PROFILE FOR FILM AUDIENCES ACROSS PLATFORMS

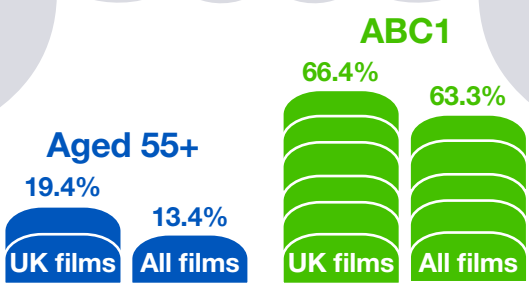
% of audience aged 18-24

Comparing the three main platforms for film, cinema audiences are the youngest, followed by SVoD and television

CINEMA AUDIENCE FOR UK FILMS

UK films at the cinema attract an older and more upmarket audience compared to all films

% of audience



Audiences

DATA ON THE UK FILM AUDIENCE

The audience lies at the heart of a vibrant and successful film economy and culture. However, following a decade of disruption ushered in, chiefly, by the emergence of on-demand distribution platforms, UK audiences are faced with a myriad of choices in terms of how and where to watch film. The immensity – and tyranny – of choice is coupled with fragmentation of the shared experience and increasing polarisation in the types of film available, and viewed, on different platforms. Not only is this driven by the curatorial control of gatekeepers (exhibitors and platform providers), it is also a feature of changing audience tastes and behaviours, particularly those driven by generational differences.

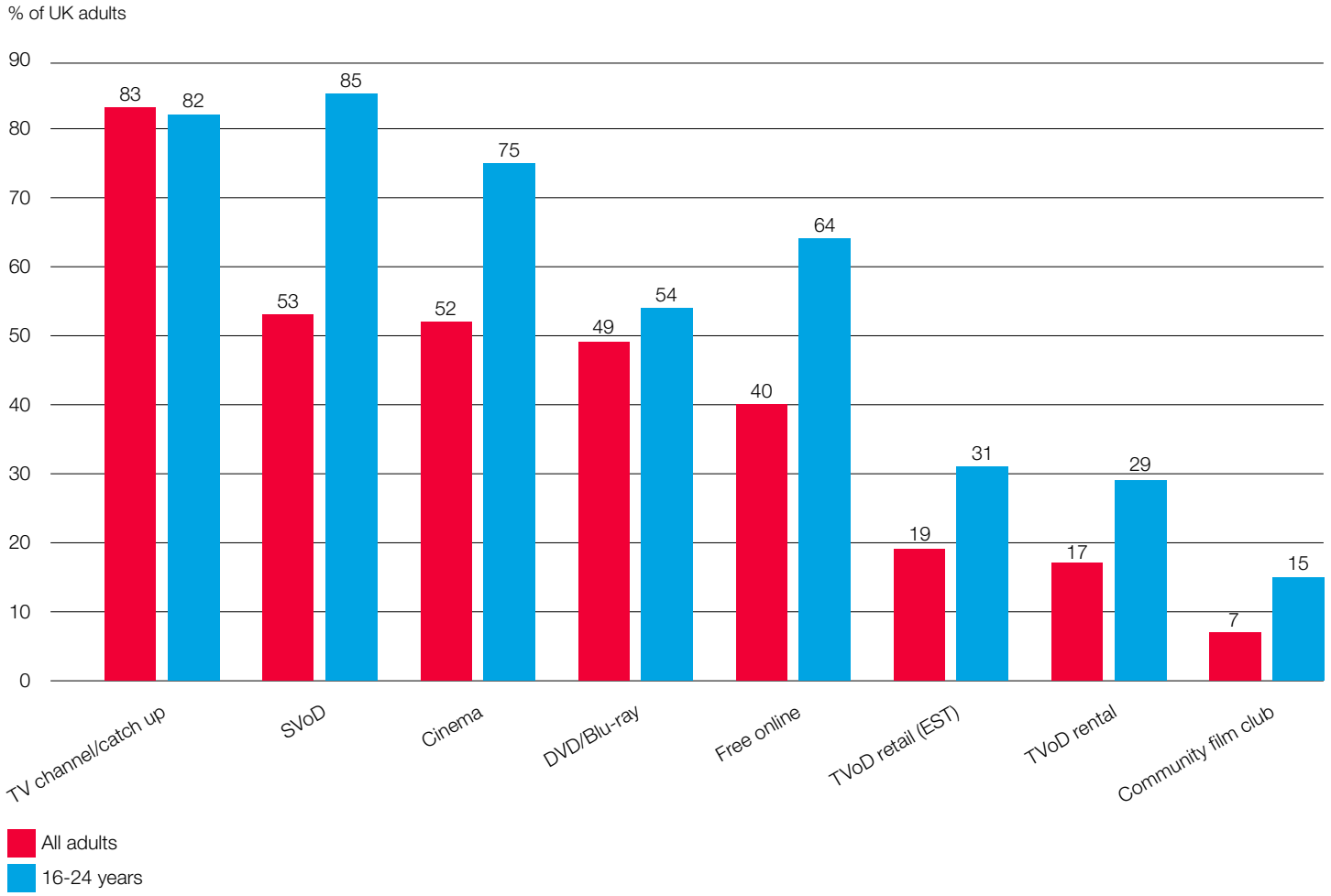
In order to provide a more comprehensive picture of audiences across all film distribution platforms, this year's chapter includes new data from a survey commissioned by the BFI and designed to provide insight on film consumption for a wider selection of demographic groups than currently available from traditional industry sources. We also include data provided by sector specialist agencies which are tracking audience reach and consumption for the newer-to-market subscription streaming services. These services have all shown exponential growth in recent years and this is likely to continue into 2019 and beyond, so these early read-outs are valuable for informing the future as this element of the sector will evolve further with the launch of new services such as Apple TV+, BritBox and Disney+.

AUDIENCES FOR FILM IN THE UK BY PLATFORM

When asked whether they had viewed a film on any platform in the previous six months, 94% of the UK adult population (aged 16+) responded positively. Amongst all adults (Figure 1) the largest reach (83%) was for films shown on television, but the most popular platform amongst 16-24 year olds (85%) was subscription video-on-demand (SVoD), which underscores the strength of these services in attracting the attention of younger adults.

Whilst the data are not directly comparable with those shown in last year's edition of the Yearbook, which were based on a three-month reach, the pattern of reach is virtually unchanged in terms of the relativity between the various platforms available to audiences. It should be noted that these figures represent total reach, so they do not take account of the fact that some audiences may be far more frequent viewers of film on certain platforms.

Figure 1 Audiences for film in the UK by platform



Source: Establishment Survey, 2018 BFI/Populus

Q: In the last six months have you watched a film/movie in any of the following ways? Base: UK adults 16+ (10,495), 16-24yrs (1,179).

AUDIENCES FOR FILM AMONGST OTHER DEMOGRAPHIC GROUPS

This year, we are able to extend our analysis of audience reach with measures amongst a wider selection of demographic groups including some of the protected characteristics, such as disability and sexual orientation.

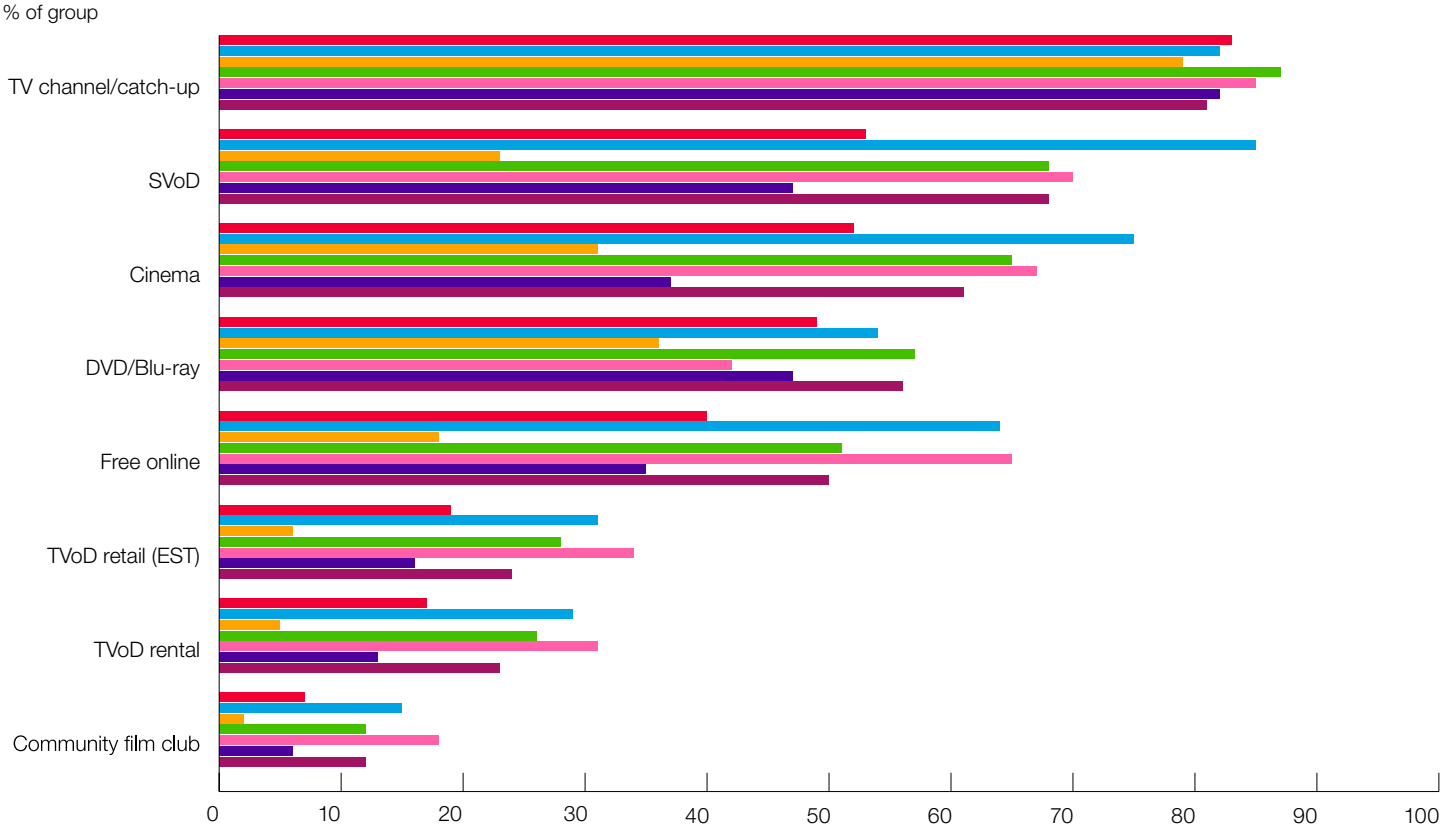
As Figure 2 shows, audiences for film on television show the most consistency across all groups, with very little separating any individual group from the all-adult average. Despite the growth of other platforms, television remains the single most important route by which film is able to reach mass audiences across all demographic groups.

As has already been demonstrated, young adults (16-24) show particular outlier behaviour in their consumption of film. They are seemingly voracious consumers across most platforms; their propensity to watch film on SVoD platforms being well above that of most other groups whilst they also remain the core audience at the cinema, particularly for mainstream content. This data shows that they also seek out film on free online platforms, both legal and unauthorised.

Mirroring the fact that the BAME population in the UK skews towards the younger age groups, there are parallels in the reach for film on most platforms between these two groups (this is also seen in those with children in the household). BAME adults, whilst similar in their film consumption to younger audiences, show above-average reach for film accessed from free online services. This could be a factor determined by the desire of this group to seek out films reflecting their cultural origins or traditions which may be less available via the majority of cinema, television or SVoD providers.

At the other end of the scale are those in older age groups and those with a disability, for which there are parallels. Individuals with a disability are more likely to be in the older age groups, particularly those with physical impairments which might make visiting a cinema and watching a film difficult and/or impossible. Both older adults (65+) and those with a disability under-index vs all adults for watching film at the cinema. However, these groups clearly watch films on television, with reach not far short of that for all adults on this platform, although they are less likely to consume film on digital platforms. Whilst accessibility may not be an impairment to viewing, these groups are less likely to be online literate or confident with the technology required for access.

Figure 2 Audiences for film in the UK by platform by demographic group



	TV channel/ catch-up	SVoD	Cinema	DVD/Blu-ray	Free online	TVoD retail (EST)	TVoD rental	Community film club
All adults	83	53	52	49	40	19	17	7
16-24 yrs	82	85	75	54	64	31	29	15
65+	79	23	31	36	18	6	5	2
Adults with children under 18	87	68	65	57	51	28	26	12
BAME	85	70	67	42	65	34	31	18
Disability	82	47	37	47	35	16	13	6
LGBTQ	81	68	61	56	50	24	23	12

Source: Establishment Survey 2018, BFI/Populus

Q: In the last six months have you watched a film/movie in any of the following ways? Base: UK adults 16+ (10,495), 16-24yrs (1,179), 65yrs+ (2,470), wch<18yrs (2,782), BAME (708), With a disability (2,603), LGBTQ (705).

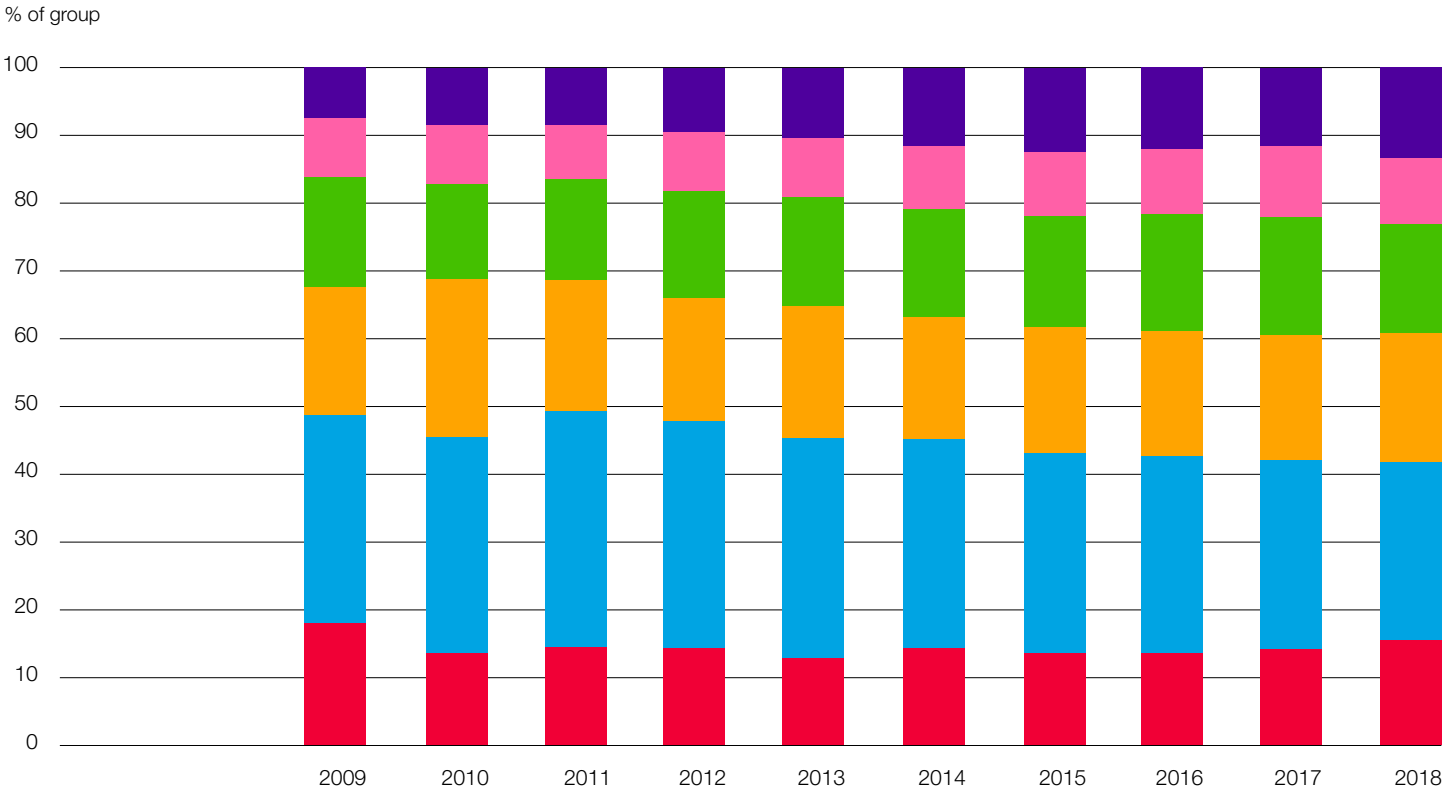
CINEMA AUDIENCE BY AGE

Figure 3 shows the trends by age for cinema admissions between 2009 and 2018. It should be noted that admissions here are based on weighted averages of the audience profiles for all releases reported by the Cinema Advertising Association (CAA) Film Monitor.

The relative proportion of admissions for each category has been broadly similar throughout the period, with the exception of audiences drawn from the 15-24 and 45+ age groups. There has been a small, but steady, downward trend in the share of admissions accounted for by 15-24 year olds, which decreased from a high of 35% in 2011 to a low of 26% in 2018, and a compensating increase in the admissions share of cinema-goers aged 45 or over, which rose from a low of 16% to a high of 23% in the same period. (The 45+ age groups also accounted for 16% of admissions in 2009.)

The rising share for older cinema-goers cannot purely be attributable to an increase in the proportion of this age group in the general population, as the cinema admissions trend has outstripped this. Although there were a number of films released in 2018 that were aimed specifically at an older audience (e.g. *Darkest Hour* and *Finding Your Feet*), there were also films not necessarily targeted at this age group which attracted either a large proportion of older cinema-goers in their audiences or high reach amongst this age group (e.g. a majority of the audience for *Three Billboards Outside Ebbing, Missouri* was aged 45 or over).

Figure 3 Age distribution of cinema audience, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Age 7-14	17.9	13.6	14.6	14.4	12.9	14.4	13.6	13.6	14.3	15.4
Age 15-24	30.7	31.8	34.8	33.5	32.5	30.8	29.4	29.1	27.8	26.4
Age 25-34	19.0	23.3	19.3	18.1	19.4	18.0	18.7	18.4	18.5	18.9
Age 35-44	16.1	14.0	14.8	15.8	16.1	15.9	16.3	17.2	17.3	16.1
Age 45-54	8.8	8.7	8.0	8.7	8.8	9.3	9.5	9.7	10.5	9.8
Age 55+	7.5	8.7	8.3	9.4	10.4	11.5	12.5	12.0	11.5	13.4

Source: CAA Film Monitor, 2018

Notes: 'Cinema audience' in this chart and throughout this chapter refers to film-going occasions. That means, if a person went to the cinema to see 10 films in the year, that person would have contributed 10 film-going occasions to the audience figures above, unless otherwise stated. Repeat visits to the same films are not recorded in Cinema Advertising Association (CAA) Film Monitor.

CAA Film Monitor included 88 film titles (mostly mainstream) of the theatrical releases in 2018. The Film Monitor survey is carried out via a fortnightly omnibus survey of over 1,000 adults and children aged 7+, of those who had been to the cinema in the previous three months. The survey does not cover Northern Ireland.

CINEMA AUDIENCE BY GENDER AND SOCIO-ECONOMIC STATUS

According to CAA Film Monitor data, males slightly over-indexed (51%) in the cinema audience in 2018 (52% in 2017) compared with their representation in the UK population as a whole (49%). Table 1 shows, however, that this is not consistent by age group. While cinema audiences drawn from the 7-14, 15-24 and 25-44 age groups all skewed towards men, amongst audiences aged 35 or over women (55%) outweighed men, and compared with 2017, increased their representation by four percentage points.

The average cinema audience consistently attracts a disproportionate share of individuals from the higher socio-economic grades in all age groups compared with the general population. This is most marked amongst the 35+ audience, 70% of which was comprised of ABC1 cinema-goers in 2018, an increase of three percentage points compared with 2017.

Table 1 Cinema audiences by age and gender/social grade, 2018

	Cinema audiences					UK population
	Age 7-14	Age 15-24	Age 25-44	Age 35+	All 7+	7+
	%	%	%	%	%	%
Males	55	55	54	45	51	49
Females	45	45	46	55	49	51
ABC1	60	57	64	70	63	54
C2DE	40	43	36	30	37	46

Source: CAA Film Monitor, 2018

Image: *Three Billboards Outside Ebbing, Missouri* courtesy of Twentieth Century Fox. All rights reserved

CINEMA AUDIENCE FOR UK FILMS

This section looks at the audience profile for UK films as a subset of all film. Of the 88 films covered by the CAA Film Monitor, 33 were UK qualifying productions, of which 15 were UK independent titles.

As Table 2 shows, the audience profile for UK films is slightly different to that for all film. UK films attracted a higher proportion of their audience from the older age groups, particularly those aged 55 or over, buoyed by films featuring more mature protagonists such as *Darkest Hour*, *Finding Your Feet* and *Three Billboards Outside Ebbing, Missouri*. UK films skewed very slightly more female than all film, but had a more upmarket audience profile than that for all film.

Table 2 Audience profile of UK films compared with all film, 2018

	UK films	All film (including UK films)
	%	%
Age 7-14	13.6	15.4
Age 15-24	22.4	26.4
Age 25-34	17.8	18.9
Age 35-44	15.3	16.1
Age 45-54	11.5	9.8
Age 55+	19.4	13.4
Male	50.6	51.2
Female	49.4	48.8
ABC1	66.4	63.3
C2DE	33.6	36.7
England	83.8	83.5
Scotland	8.0	8.6
Wales	8.2	7.9

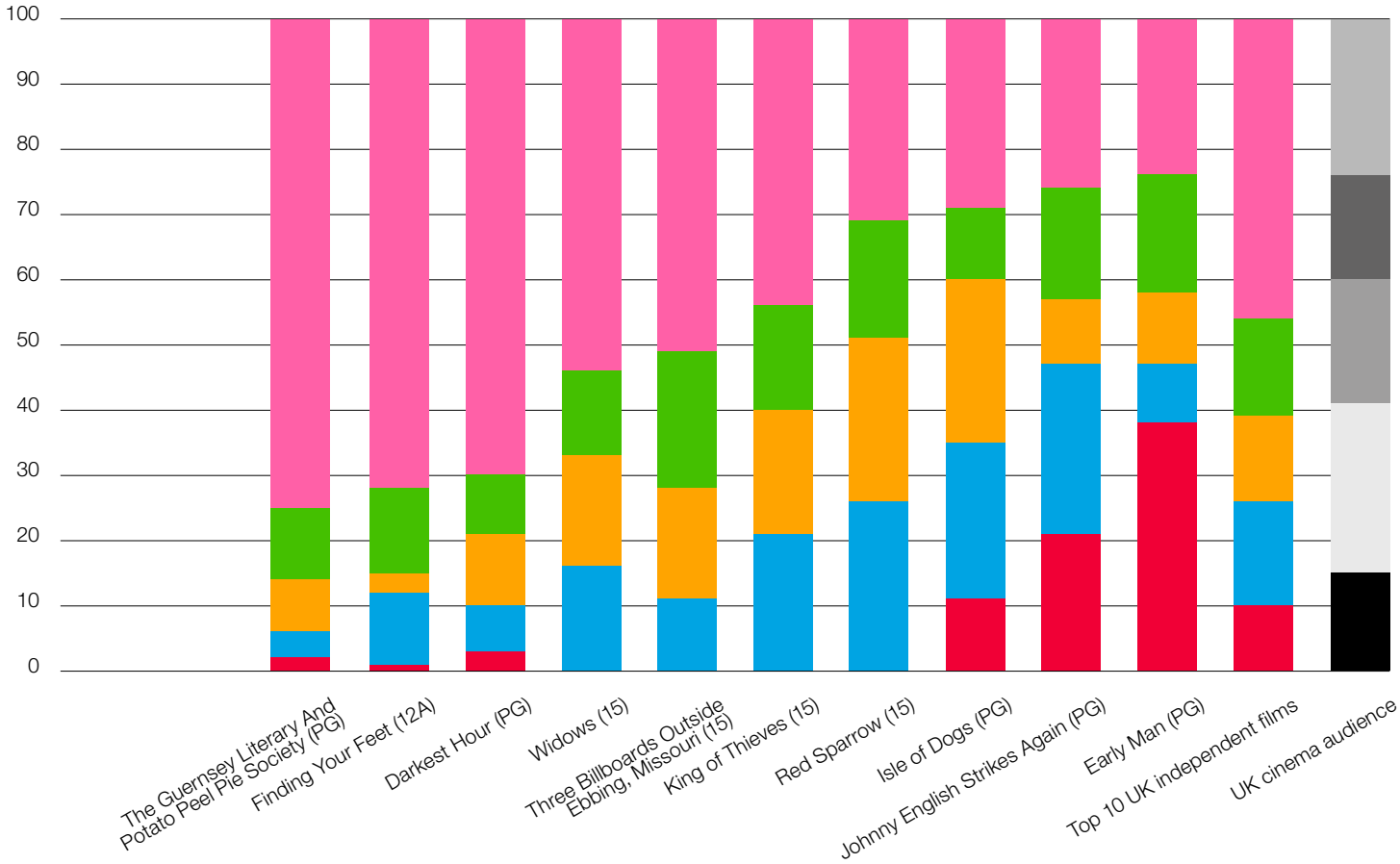
Source: CAA Film Monitor, 2018

Base: all films, 88 titles, n=130,496; UK films, 33 titles, n=58,494.

The top 10 UK independent films released in 2018 show a broad appeal across all age groups, and a rising preference in line with audience age (Figure 4). Over half of the audience for five of the top 10 titles was drawn from cinema-goers aged 45 or over, while this age group made up 70% of the audience for three of these titles: *The Guernsey Literary and Potato Peel Society*, *Finding Your Feet* and *Darkest Hour*. (The 45+ age group accounted for 47% of the combined audience for the top 10 UK independent films.) At the other end of the scale, as might be expected, the Aardman animation *Early Man* attracted a plurality of 7-14 year olds, whilst the comedy and thriller titles *Johnny English Strikes Again*, *Red Sparrow* and *Isle of Dogs* attracted the majority of their audiences from cinema-goers aged 34 or under.

Figure 4 Cinema audience profile by age for the top 10 UK independent film titles, 2018, ranked by % of 45+ age group in audience

% of group in audience

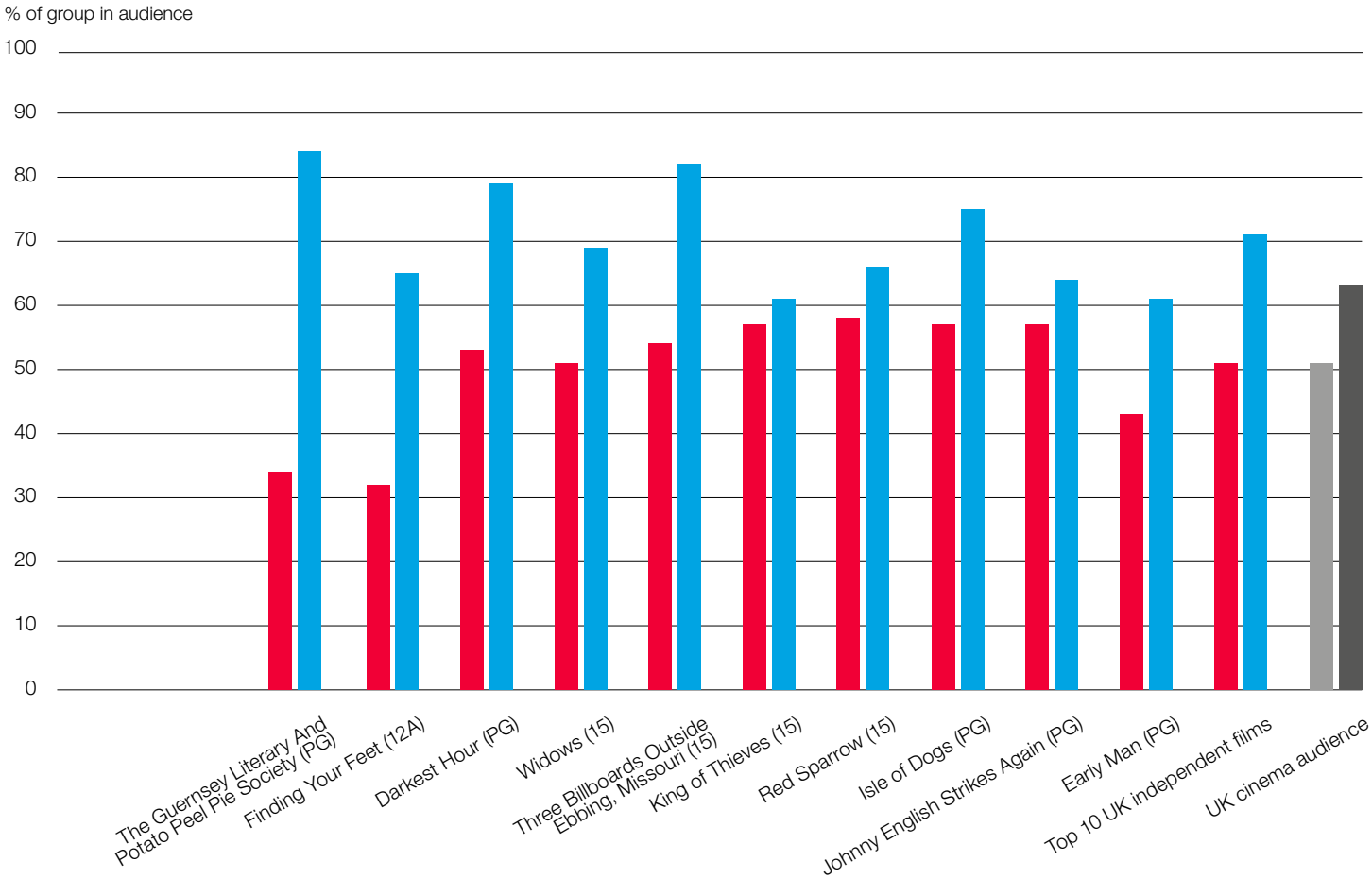


	The Guernsey Literary And Potato Peel Pie Society (PG)	Finding Your Feet (12A)	Darkest Hour (PG)	Widows (15)	Three Billboards Outside Ebbing, Missouri (15)	King of Thieves (15)	Red Sparrow (15)	Isle of Dogs (PG)	Johnny English Strikes Again (PG)	Early Man (PG)	Top 10 UK independent films	UK cinema audience
Age 7-14	2	1	3	-	-	-	-	11	21	38	10	15
Age 15-24	4	11	7	16	11	21	26	24	26	9	16	26
Age 25-34	8	3	11	17	17	19	25	25	10	11	13	19
Age 35-44	11	13	9	13	21	16	18	11	17	18	15	16
Age 45+	75	72	71	55	51	44	30	29	25	24	47	23

Source: CAA Film Monitor, 2018

As Figure 5 shows, a majority of the top 10 UK independent films attracted a higher proportion of males than the average cinema audience in 2018, with only three of the top 10 titles – *The Guernsey Literary and Potato Peel Pie Society*, *Finding Your Feet* and *Early Man* – over-indexing for female audience members. With the exception of *King of Thieves* and *Early Man*, all of the top 10 titles attracted audiences with higher socio-economic status than the overall cinema audience.

Figure 5 Cinema audience profile by gender and socio-economic status for the top 10 UK independent film titles, 2018, ranked by profile of audience aged 45+



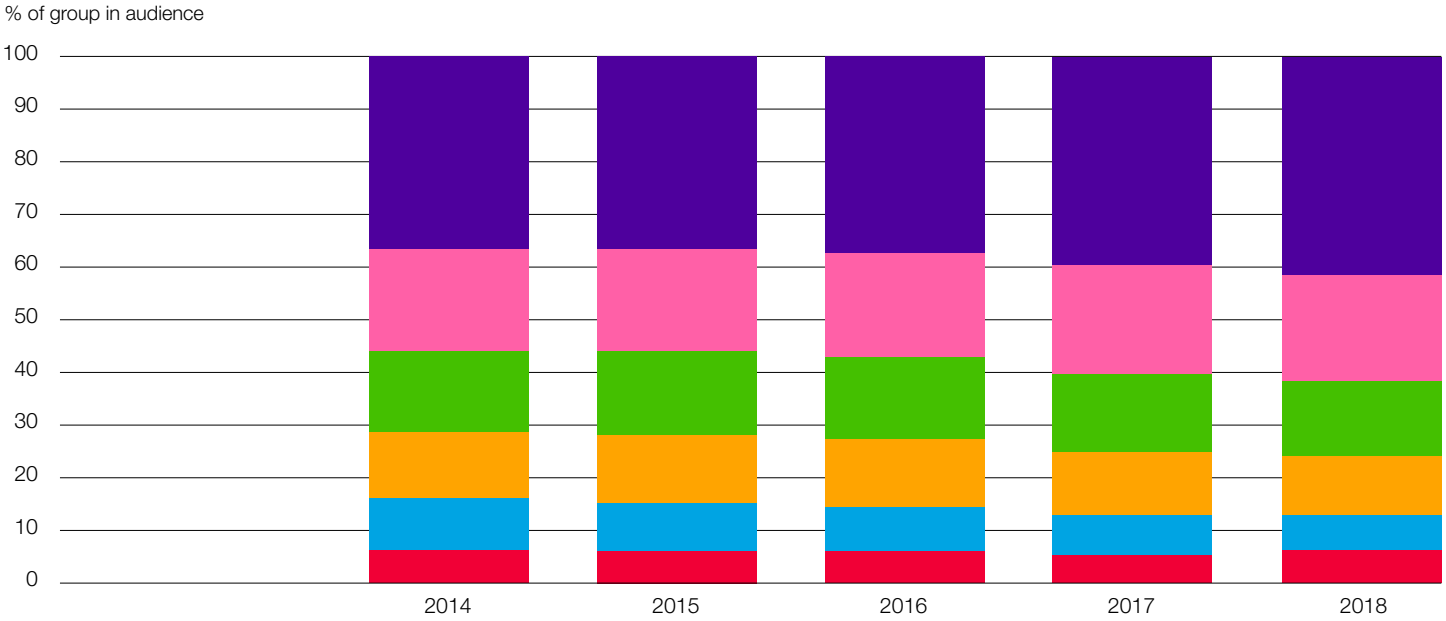
	The Guernsey Literary And Potato Peel Pie Society (PG)	Finding Your Feet (12A)	Darkest Hour (PG)	Widows (15)	Three Billboards Outside Ebbing, Missouri (15)	King of Thieves (15)	Red Sparrow (15)	Isle of Dogs (PG)	Johnny English Strikes Again (PG)	Early Man (PG)	Top 10 UK independent films	UK cinema audience
Male	34	32	53	51	54	57	58	57	57	43	51	51
ABC1	84	65	79	69	82	61	66	75	64	61	71	63

Source: CAA Film Monitor, 2018

AUDIENCES FOR FILM ON TELEVISION

The age distribution of audiences for films watched on television differs to that of cinema audiences. Generally speaking, individuals who watch films on television tend to be in the older age groups, with more than half the audience aged 45 or over. As with cinema-goers, there is evidence that the television audience is growing older through time, both for film and across all broadcast television, again at a faster rate than within the UK population as a whole. As Figure 6 shows, the proportion of older (45+) viewers increased by 10% between 2014 and 2018, whilst the share of 15-24 year olds decreased by 32% during the same period (consistently shrinking by around 9% each year).

Figure 6 Age distribution of television audiences for film, all channels, 2014-2018



	2014	2015	2016	2017	2018
Age 7-14	6.1	6.2	5.9	5.2	6.2
Age 15-24	10.0	9.1	8.5	7.6	6.8
Age 25-34	12.5	12.8	12.8	12.1	11.2
Age 35-44	15.3	16.0	15.6	14.8	14.2
Age 45-54	19.5	19.4	19.8	20.6	20.0
Age 55+	36.6	37.6	37.4	39.6	41.5

Source: BARB/TechEdge, All individuals 7yrs+, Total TV, filtered on 'cinema film' genre

Note: Television audiences are collated from BARB data and cover all films classified by BARB as 'cinema films', which include made-for-TV films, shown on any channel, and which achieved an average audience of over 250,000. The audience profile is measured at title level, so if a film is shown more than once on a single channel, the audience for that title is averaged across all showings. If a film is shown on multiple channels e.g. CBBC and BBC One, then the average is taken for all transmissions per channel (not aggregated across all showings).

FILM PREFERENCES BY AGE

Tables 3-8 show the top 10 films with the highest average % of group in the total audience, for six different age groups, for all films released in cinemas in 2018 and captured in the CAA Film Monitor. This is compared with the equivalent for all films transmitted on any television channel (including pay TV). This means that the tables do not represent the films seen by the largest number of viewers within each age group, but rather the films whose audience, regardless of size, delivered the highest proportion of each age group.

As Table 3 shows, family films and animated features appealed most to 7-14 year olds across both the film and television lists. Interestingly, 15 of the films with the largest profile of 7-14 year olds are either sequels or based on existing book or television series, suggesting that film viewers in this age group (or perhaps their parents or guardians) are particularly attracted to familiarity. The in-cinema title with the greatest appeal to this group was the comedy sequel *Goosebumps 2: Haunted Halloween*, while the top-indexing film on television was the fourth title in the Diary of a Wimpy Kid film series.

Table 3 Films with a significant above-average audience profile in the 7-14 age group, 2018 top films in the cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Goosebumps 2: Haunted Halloween	59	Diary of a Wimpy Kid: The Long Haul (Sky Cinema Premiere)	47
Teen Titans Go! To the Movies	45	Hop (Sky Cinema Family)	42
Ferdinand	43	The Lego Ninjago Movie (Sky Cinema Premiere)	38
Hotel Transylvania 3: A Monster Vacation	42	Diary of a Wimpy Kid (Channel 4)	30
Coco	40	Spy Kids (ITV2)	29
Early Man (UK)	38	Sony Smurf Shorts (ITV2)	28
Smallfoot	37	Evan Almighty (ITV2)	28
A Wrinkle in Time	37	The Smurfs (ITV2)	27
Nativity Rocks! (UK)	33	The Lego Movie (5STAR)	25
Peter Rabbit	33	How the Grinch Stole Christmas (ITV)	25
7-14yrs average profile of all films	15	7-14yrs average profile of all films on TV	6
7-14yrs in survey population	10	7-14yrs in total TV audience	4

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

The 15-24 year old age group made up 26% of the average cinema audience in 2018 compared with only 7% of the audience for film on television. Titles offering thrills and spills typically dominate the list of in-cinema films that appeal most to this group. The release with the greatest appeal in 2018 was the low-budget horror *Truth or Dare*. (As in 2017, the most popular in-cinema title in this age group was produced by horror maven Jason Blum which also, as in the previous year, was one of three Blum projects to feature in the top 10 in-cinema titles.) The most popular films watched on television among this group were a broader mix with action, adventure, comedy and romance titles making up the majority of the top 10 list.

The proportion of the audience from this age group skews very much higher for the top in-cinema film with seven out of 10 viewers aged 15-24 compared with one in four for the top skewing television title.

Table 4 Films with a significant above-average audience profile in the 15-24 age group, 2018 top films in the cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Truth or Dare	71	The Hunger Games (E4)	26
The Nun	66	Step Up 3 (ITV2)	26
Insidious: The Last Key	64	2 Fast 2 Furious (ITV2)	26
Hereditary	59	Step Up 2: The Streets (ITV2)	25
Blockers	58	Ted (E4)	24
The First Purge	53	The Mortal Instruments: City of Bones (E4)	24
Love, Simon	50	Rough Night (Sky Cinema Premiere)	24
Den of Thieves	48	Ted (ITV2)	23
A Quiet Place	46	Rise of the Planet of the Apes (E4)	22
The Spy Who Dumped Me	45	Fast & Furious 8 (Sky Cinema Premiere)	22
15-24yrs average profile of all films	26	15-24yrs average profile of all films on TV	7
15-24yrs in survey population	14	15-24yrs in total TV audience	5

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

Films over-indexing at the cinema for the 25-34 year old age group show a wide variety of tastes with action, comedy, drama, horror and thriller titles all featuring in the top 10 list. The genre mix of over-indexing films on television during the year was smaller, with romantic and action comedies being the most popular. Interestingly, a number of the comedy titles centred on issues pertinent to the lives of this age group – relationships, children and setting up home. Popular films on television also included a number of titles suitable for watching with young children.

Table 5 Films with a significant above-average audience profile in the 25-34 age group, 2018 top films on cinema and television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Game Night	35	Cheaper by the Dozen (E4)	37
A Simple Favour	32	Moana (Sky Cinema Disney)	35
Fifty Shades Freed	31	Grown Ups 2 (5STAR)	35
A Quiet Place	31	Bad Neighbours 2 (Channel 4)	34
Den of Thieves	31	Captain Underpants: The First Epic Movie (Sky Cinema Premiere)	34
BlacKkKlansman	29	22 Jump Street (ITV2)	34
Molly's Game	29	Baywatch (Sky Cinema Premiere)	33
Venom (UK)	28	The Wolf of Wall Street (Film4)	32
Deadpool 2	28	Life as We Know It (Channel 5)	32
The First Purge	26	American Reunion (ITV2)	31
25-34yrs average profile of all films	19	25-34yrs average profile of all films on TV	11
25-34yrs in survey population	14	25-34yrs in total TV audience	9

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

The preferences of the 35-44 year old age group were clearly split between titles they watch as a family and those which they themselves have chosen. This is particularly true of films watched in the cinema where high-indexing titles included both animated children's film *Sherlock Gnomes* and erotic drama *Fifty Shades Freed*. On television, the 35-44 year old film audience showed a greater preference for recent films (all shown on Sky Cinema Premiere) than the other age groups, many of which were titles from familiar franchises.

Table 6 Films with a significant above-average audience profile in the 35-44 age group, 2018 top films in cinema and television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Life of the Party	34	Back to the Future Part II (E4)	34
Duck Duck Goose (UK)	30	Captain Underpants: The First Epic Movie (Sky Cinema Premiere)	34
Sherlock Gnomes (UK)	28	Rio 2 (E4)	32
The Equalizer 2	25	The Hangover Part III (Channel 5)	32
I Feel Pretty	25	Forrest Gump (Sky One)	32
The Commuter (UK)	25	Step Up 4: Miami Heat (E4)	31
Smallfoot	24	CHiPs: Law and Disorder (Sky Cinema Premiere)	30
Show Dogs (UK)	24	Transformers: The Last Knight (Sky Cinema Premiere)	29
Fifty Shades Freed	24	Rocky III (ITV4)	29
Rampage	23	Ghost in the Shell (Sky Cinema Premiere)	29
35-44yrs average profile of all films	16	35-44yrs average profile of all films on TV	14
35-44yrs in survey population	15	35-44yrs in total TV audience	11

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

Four films appear in the list of in-cinema films which over-index for both the 45-54 age group (Table 7) and the 55+ age group (Table 8) - *Darkest Hour*, *Widows*, *The Children Act* and *Book Club* - three of which are UK titles. Overall, older cinema-goers show a strong preference for British films with six of the 10 films in the 45-54 age group list and eight in the 55+ age group list being UK titles.

The data indicate that 45-54 year olds may have the broadest taste of all groups in terms of cinema-going: the top 10 list for in-cinema titles for this age demographic is the least skewed, with the highest indexing titles *Bohemian Rhapsody* and *Darkest Hour*, attracting less than two in 10 audience members from this group. The top 10 over-indexing films on television for the 45-54 age group are split evenly between more modern films (i.e. made in the previous 10 years) and older titles.

Table 7 Films with a significant above-average audience profile in the 45-54 age group, 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Bohemian Rhapsody (UK)	18	Alan Partridge: Alpha Papa (UK) (BBC Two)	40
Darkest Hour (UK)	18	Terminator 2: Judgement Day (ITV)	39
Widows (UK)	17	Scouts Guide to the Zombie Apocalypse (Film4)	37
A Star Is Born	17	Brotherhood (UK) (Film4)	37
The Children Act (UK)	17	The Lord of the Rings: The Two Towers (ITV)	37
Nativity Rocks! (UK)	16	Joy (2015) (Film4)	35
The Predator `	16	Poltergeist (2015) (5STAR)	35
I, Tonya	15	The Amazing Spider-Man (ITV)	35
Mamma Mia! Here We Go Again (UK)	15	The Mummy Returns (ITV)	35
Book Club	15	The Lord of the Rings: The Fellowship of the Ring (ITV)	34
45-54yrs average profile of all films	10	45-54yrs average profile of all films on TV	20
45-54yrs in survey population	12	45-54yrs in total TV audience	17

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

The average age of over-indexing films on television increases substantially for the 55+ age group. The oldest film appearing in previous lists was from 1982 (*Rocky III*, 35-44 age group), whereas the majority of the films in the television list for the 55+ age group were released theatrically before the 1970s. The list features only two films from the current century: *Goldstone* (released in 2016) and the 2004 version of *The Alamo*.

Table 8 Films with a significant above-average audience profile in the 55+ age group, 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
On Chesil Beach (UK)	68	The Heroes of Telemark (UK) (BBC Four)	87
The Guernsey Literary and Potato Peel Pie Society (UK)	65	The Green Berets (ITV4)	87
Finding Your Feet (UK)	63	Laura (1944) (BBC Two)	87
The Children Act (UK)	54	I Was Monty's Double (UK) (BBC Two)	87
The Post	53	The Desert Fox (BBC Two)	87
Darkest Hour (UK)	53	Call Me Madam (BBC Two)	86
Phantom Thread (UK)	43	The Alamo (2004) (Channel 5)	85
Three Billboards Outside Ebbing, Missouri (UK)	39	Goldstone (BBC Four)	85
Widows (UK)	38	Tobruk (ITV4)	85
Book Club	37	Chisum (ITV4)	84
55+yrs average profile of all films	13	55+yrs average profile of all films on TV	42
55+yrs in survey population	35	55+yrs in total TV audience	54

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

FILM PREFERENCES BY GENDER

Tables 9 and 10 show the top 10 films with the highest average % of group in the total audience (aged 7+) by gender for all films released in cinemas in 2018 – and captured in the CAA Film Monitor – compared with the equivalent for all films transmitted on television. Whilst males slightly over-index in the cinema audience (51%) compared with the UK population, women over-index in the television audience overall (55%), but not for films shown on television where they represent the population (51%).

There were distinct differences in film preferences by gender. As in previous years, films attracting a predominantly female audience, both at the cinema and on television, included comedies and dramas with strong female protagonists alongside family friendly fare (Table 9). The top two titles over-indexing for women at the cinema in 2018 were the US comedy *Book Club*, which explores the impact of reading the erotic novel *Fifty Shades of Grey* on a group of older readers, and *Fifty Shades Freed*, the final film adaptation of the book trilogy. The only two titles across both lists not led by female characters were *Hachi: A Dog's Tale*, a tear-jerker starring Richard Gere, and *Nativity Rocks!*, the fourth instalment of the ongoing Nativity series. Males continued to over-index in the audience for action-driven genres both in the cinema and on television (Table 10). One of the few genre outliers across either top-indexing list for males was the comedy *The Diary of a Teenage Girl* shown on Film4, for which just under seven in 10 viewers were male.

Overall, female audiences showed a slightly stronger preference for British films in 2018, with six UK titles across both top-indexing lists compared with four for male audiences.

Table 9 Films with a significant above-average audience profile amongst females (7yrs+), 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Book Club	80	Coming Home For Christmas (2013) (Channel 5)	84
Fifty Shades Freed	79	Walking On Sunshine (UK) (Channel 5)	80
Mamma Mia! Here We Go Again (UK)	77	The Parent Trap (1998) (5STAR)	78
Nativity Rocks! (UK)	75	Woman on the Edge (Channel 5)	77
A Simple Favour	71	Locked Away (2010) (Channel 5)	76
I Feel Pretty	69	The Big Wedding (Channel 5)	76
The Spy Who Dumped Me	69	Mamma Mia! (UK) (ITV)	75
Mary Poppins Returns (UK)	68	My Big Fat Greek Wedding 2 (Channel 5)	75
Finding Your Feet (UK)	68	Hachi: A Dog's Tale (Channel 4)	74
A Wrinkle in Time	68	The Devil Wears Prada (Channel 4)	74
Female (7yrs+) average profile of all films	49	Female (7yrs+) average profile of all films on TV	51
Female (7yrs+) in survey population	51	Female (7yrs+) in total TV audience	55

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

Table 10 Films with a significant above-average audience profile amongst males (7yrs+), 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
Sicario 2: Soldado	84	The Last Samurai (2003) (5Spike)	73
Tag	77	Transporter 2 (E4)	73
The Predator `	74	Waterloo (BBC Two)	72
Den of Thieves	73	A Fistful of Dollars (ITV4)	72
Ant-Man and the Wasp	73	Heartbreak Ridge (ITV4)	71
Venom (UK)	71	Khartoum (UK) (ITV4)	70
Creed II	71	Dumb And Dumber To (Film4)	70
Solo: A Star Wars Story (UK)	70	The Outlaw Josey Wales (ITV4)	70
Pacific Rim: Uprising (UK)	70	Chisum (ITV4)	70
The Equalizer 2	68	The Diary of a Teenage Girl (Film4)	69
Male (7yrs+) average profile of all films	51	Male (7yrs+) average profile of all films on TV	49
Male (7yrs+) in survey population	49	Male (7yrs+) in total TV audience	45

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

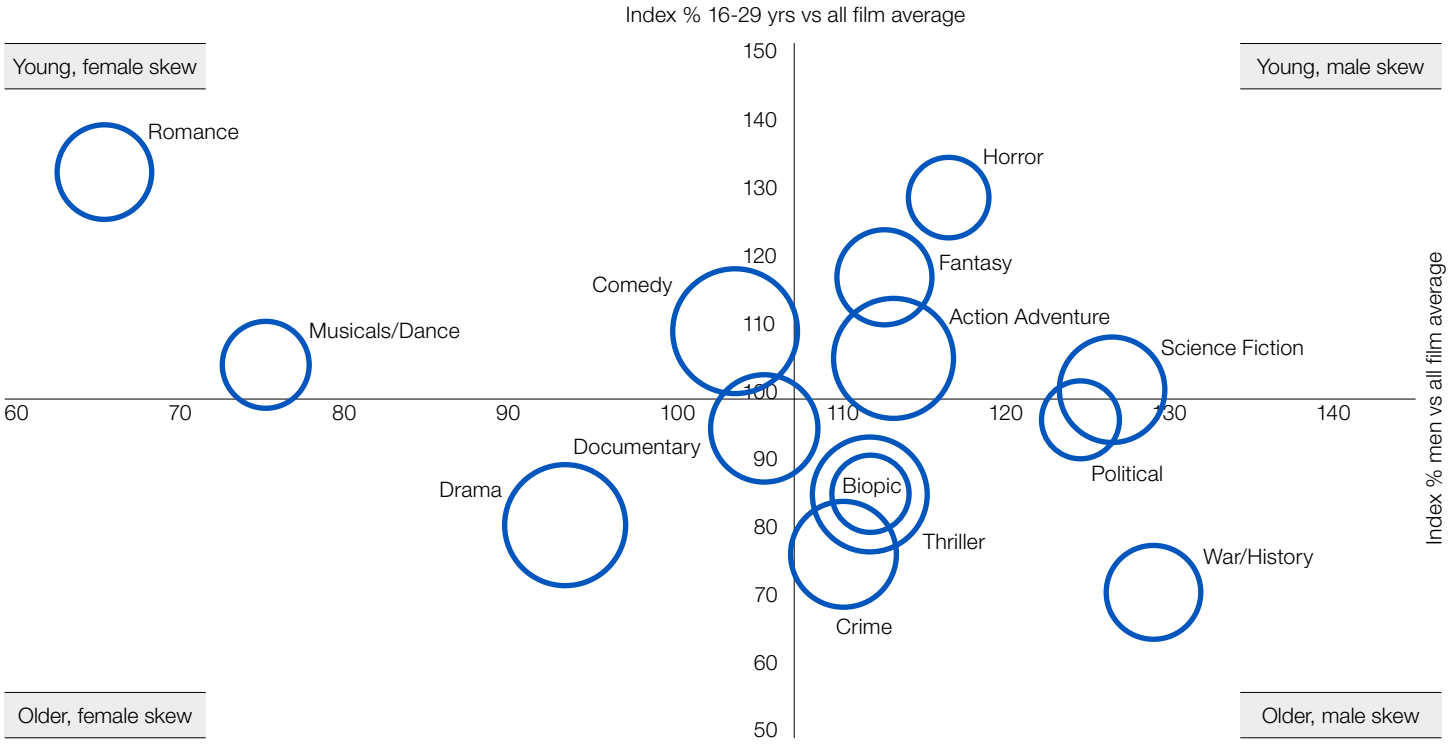
GENRE PREFERENCES BY AGE AND GENDER

The analysis of preference by age and gender in the previous tables hints at some marked differences in film taste within and between different audience groups. Figure 7 combines these groups along with a measure of reach (size of bubble) to indicate both genre preferences in terms of demographics and overall size of audience. (It should be noted that the genre categories used here differ slightly from the categories assigned to the theatrical market in the first chapter of the Yearbook, Film at the cinema.)

The comedy and action/adventure genres attracted the largest audiences and appear close to the middle of the chart indicating that they appeal equally to all age groups and both genders. The documentary genre is also close to the middle, although the more specific genres such as political and biopic have smaller audiences and tend to skew to older men.

Young audiences have very definite genre tastes with romance far and away the preference of young women whilst young men are most likely to make up the audience for horror films.

Figure 7 Audience mapping by genre – age and gender, 2018



Source: Nations and Regions Survey 2019, BFI/YouGov, Base: All UK Online adults (10,497). Size of bubble equals annual genre reach.
Q: Have you watched any of the following genres of films at the cinema, at home or elsewhere over the past 12 months? Please select all that apply.

FILM PREFERENCES BY SOCIO-ECONOMIC GROUP

Tables 11 and 12 show the top 10 films with the highest average % of group in the total audience by socio-economic grade for all films released in cinemas in 2018 – and captured in the CAA Film Monitor – compared with the equivalent for all films transmitted on television.

The cinema audience overall tends to skew towards ABC1 viewers compared with the UK population, whereas the profile of film audiences on television is little different to the average total television audience, which skews more to the C2DE socio-economic grade.

ABC1 viewers are significantly more likely to watch critically acclaimed cinema releases compared with C2DE viewers. Critical scores – aggregated by website Metacritic.com and converted into a weighted average out of 100 – for the top 10 over-indexing films at the cinema for the ABC1 audience in 2018 range from 62 for *The Children Act* (adapted from his own novel by Ian McEwan) to 94 for *Lady Bird* (Greta Gerwig's solo directorial debut). This is in contrast to the top 10 in-cinema titles which over-indexed for C2DE viewers, which ranged from a score of 31 for *Fifty Shades Freed* to 69 for the children's television big screen outing *Teen Titans Go! To the Movies*. The same is broadly true for the lists of over-indexing films on television.

ABC1 audiences showed a marked preference for UK films with a total of 10 UK titles appearing across both lists compared with only four UK titles for C2DE audiences.

Table 11 Films with a significant above-average audience profile amongst ABC1 viewers (7yrs+), 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
The Guernsey Literary and Potato Peel Pie Society (UK)	84	The Equalizer (Sky Cinema Greats)	76
Lady Bird	83	American Made (Sky Cinema Premiere)	74
Three Billboards Outside Ebbing, Missouri (UK)	82	Brideshead Revisited (UK) (BBC Two)	71
First Man	80	Truly Madly Deeply (UK) (BBC Two)	71
Darkest Hour (UK)	79	King Lear (2018) (UK) (BBC Two)	70
The Shape of Water	79	The King's Speech (UK) (BBC One)	69
BlacKkKlansman	78	Alan Partridge: Alpha Papa (UK) (BBC Two)	69
The Post	78	An Education (UK) (BBC Four)	68
A Star Is Born	77	Love & Friendship (BBC Two)	68
The Children Act (UK)	76	Captain Underpants: The First Epic Movie (Sky Cinema Premiere)	67
ABC1 (7yrs+) average profile of all films	63	ABC1 (7yrs+) average profile of all films on TV	47
ABC1 (7yrs+) in survey population	54	ABC1 (7yrs+) in total TV audience	46

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

Table 12 Films with a significant above-average audience profile amongst C2DE viewers (7yrs+), 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
The First Purge	57	The Karate Kid (2010) (Film4)	89
Fifty Shades Freed	56	Jeremiah Johnson (ITV4)	88
Insidious: The Last Key	53	Insidious (Film4)	82
Den of Thieves	50	Jane Got a Gun (Film4)	82
The Commuter (UK)	50	Dracula Untold (UK) (Film4)	82
Life of the Party	50	Sony Smurf Shorts (ITV2)	81
Teen Titans Go! To the Movies	49	Death Wish V: The Face of Death (ITV4)	80
Robin Hood (UK)	48	Rio 2 (E4)	80
Goosebumps 2: Haunted Halloween	47	The Dirty Dozen (UK) (5Spike)	78
Truth or Dare	47	Ransom (ITV4)	78
C2DE (7yrs+) average profile of all films	37	C2DE (7yrs+) average profile of all films on TV	53
C2DE (7yrs+) in survey population	46	C2DE (7yrs+) in total TV audience	54

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

FILM PREFERENCES BY NATION

Tables 13-15 show the top 10 films with the highest average % of group in the total audience by nation for all films released in cinemas in 2018 – and captured in the CAA Film Monitor – compared with the equivalent for all films transmitted on television. The Film Monitor survey does not include Northern Ireland.

British films feature in every top 10 cinema and television list for England, Scotland and Wales. As in 2017, English audiences showed the greatest preference for UK films at the cinema while Scottish audiences showed the greatest preference for UK films on television.

As Table 13 shows, four of the top 10 films at the cinema attracting above-average English audiences were UK films, three of which – *On Chesil Beach*, *Phantom Thread* and *The Guernsey Literary and Potato Peel Pie Society* – were independent UK titles. The only UK title to appear in the television list was the independent UK film *The Danish Girl*. Action and drama were the most popular genres for both in-cinema titles and those viewed on television. While dramas with strong elements of romance such as *On Chesil Beach* and *Step Up 4: Miami Heat* were popular across both lists, on television English viewers also favoured dramas with a strong action element such as *Braven* and *Volcano*.

Drama titles were also popular with cinema and television film audiences in Scotland but there was a marked preference for crime dramas such as *BlacKkKlansman* and *Three Billboards Outside Ebbing, Missouri* in the cinema list and a preference for comedy dramas such as *The Devil Wears Prada* and *The Bishop's Wife* in the television list (Table 14). Edinburgh-set musical *Sunshine on Leith*, which appears in the list of over-indexing titles on television for the second consecutive year, was the top indexing film among Scottish viewers across both lists. All four UK titles in the Scottish lists were independent UK films.

In Wales, family friendly titles were the most likely to over-index for both cinema and television audiences, particularly in the form of animations or comedies (Table 15). The most over-indexed title in the cinema list, however, was the romantic drama *A Star Is Born*. On television, the highest indexing films were the romantic comedy *Overboard* and the animation *Happy Feet Two*. Of the four UK titles in the Welsh lists, two – *Early Man* and *Show Dogs* – were independent UK films.

Table 13 Films with a significant above-average audience profile amongst 7+ age group in England, 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
On Chesil Beach (UK)	92	Step Up 4: Miami Heat (E4)	97
Den of Thieves	91	Hop (Sky Cinema Family)	97
Phantom Thread (UK)	91	Rush Hour (ITV4)	97
Rampage	91	Braven (Sky Cinema Premiere)	96
Ready Player One (UK)	90	Die Hard with a Vengeance (BBC One)	95
The Guernsey Literary and Potato Peel Pie Society (UK)	89	The Danish Girl (UK) (ITV)	95
Creed II	88	Night at the Museum: Secret of the Tomb (Film4)	95
Ocean's 8	88	Tomorrowland: A World Beyond (BBC Two)	95
The Post	88	Rocky III (ITV)	94
Aquaman	88	Volcano (E4)	94
England (7yrs+) average profile of all films	84	England (7yrs+) average profile of all films on TV	84
England (7yrs+) in survey population	83	England (7yrs+) in total TV audience	83

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

Table 14 Films with a significant above-average audience profile amongst 7+ age group in Scotland, 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
BlacKkKlansman	18	Sunshine on Leith (UK) (Channel 4)	26
Three Billboards Outside Ebbing, Missouri (UK)	16	Tropic Thunder (BBC One)	24
The Spy Who Dumped Me	15	The Devil Wears Prada (Film4)	22
Sicario 2: Soldado	15	Mystery Road (BBC Two)	22
Maze Runner: The Death Cure	15	The Bishop's Wife (BBC Four)	22
Widows (UK)	15	Having You (UK) (BBC One)	20
Love, Simon	15	Miracle on 34th Street (1947) (Channel 4)	19
Life of the Party	14	Cheaper By The Dozen 2 (Channel 4)	19
The House with a Clock in Its Walls	14	The Best of Me (Channel 5)	19
Hereditary	14	Die Hard 2: Die Harder (E4)	19
Scotland (7yrs+) average profile of all films	9	Scotland (7yrs+) average profile of all films on TV	8
Scotland (7yrs+) in survey population	8	Scotland (7yrs+) in total TV audience	9

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

Table 15 Films with a significant above-average audience profile amongst 7+ age group in Wales, 2018 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV (TV channel)	% of audience in age group
A Star Is Born	16	Overboard (ITV)	21
Early Man (UK)	15	Happy Feet Two (ITV)	21
Bohemian Rhapsody (UK)	14	Rocky II (ITV)	17
Smallfoot	14	Diary of a Wimpy Kid: The Long Haul (Sky Cinema Premiere)	17
Show Dogs (UK)	13	The Goonies (1985) (5STAR)	16
Tag	13	On Her Majesty's Secret Service (UK) (ITV4)	15
Adrift	12	The Witch (Film4)	13
Coco	12	Daddy's Home (Film4)	13
Hotel Transylvania 3: A Monster Vacation	12	The Net (E4)	13
Ant-Man and the Wasp	11	The Mummy (ITV)	13
Wales (7yrs+) average profile of all films	8	Wales (7yrs+) average profile of all films on TV	5
Wales (7yrs+) in survey population	9	Wales (7yrs+) in total TV audience	5

Source: CAA Film Monitor, 2018, BARB/TechEdge
See notes to Figures 3 and 6.

Image: *BlacKkKlansman* ©2018 Focus Features. Courtesy of Universal Studios Licensing LLC

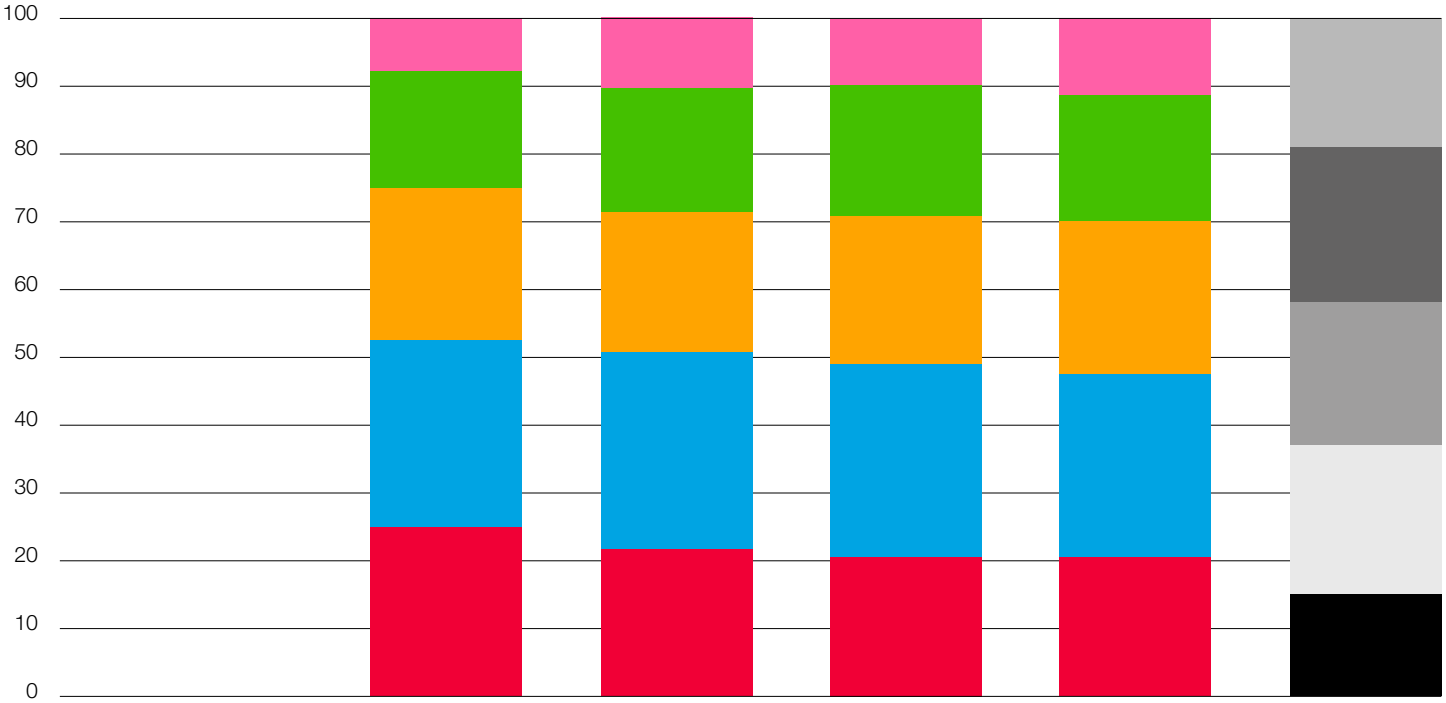
SUBSCRIPTION VIDEO ON DEMAND

There has been a rapid take-up of SVoD services in the UK in recent years, with over 12 million households having access to one or more these services in 2018 (see the Home Entertainment chapter). Early adopters of new technologies tend to be young and male, and this was certainly true in the initial days of SVoD. As Figure 8 demonstrates, whilst the age profile of SVoD users has gradually moved to be more representative of the UK population, users still skew young in comparison with the general population. In 2018, users aged 18-34 made up 47% of the SVoD audience compared with 37% for the UK as a whole.

In terms of socio-economic status, the overall SVoD audience skews slightly more affluent than the general population. The chart does show, however, that women have increased their adoption of SVoD since 2015 when they made up 47% of the SVoD audience; in 2018, the overall audience was gender balanced.

Figure 8 UK SVoD audience profile by age, 2015-2018

% of group in audience



	2015	2016	2017	2018	UK population 2018*
Age 18-24	24.8	21.6	20.6	20.5	14.9
Age 25-34	27.6	29.1	28.5	26.9	22.0
Age 35-44	22.4	20.6	21.8	22.6	21.1
Age 45-54	17.3	18.3	19.3	18.6	23.0
Age 55-64	7.9	10.5	9.8	11.4	19.0
Male	53.0	50.3	51.2	50.0	49.9
ABC1	59.4	62.6	60.8	59.8	56.5

Source: Ampere Analysis, Consumer Surveys 2015-2018, UK adults (18-64). Base: 2015 (330), 2016 (788), 2017 (2,244), 2018 (2,000)

Notes: This profile is for 'all users' and includes those that also watch television programmes as well as the films available on these services.

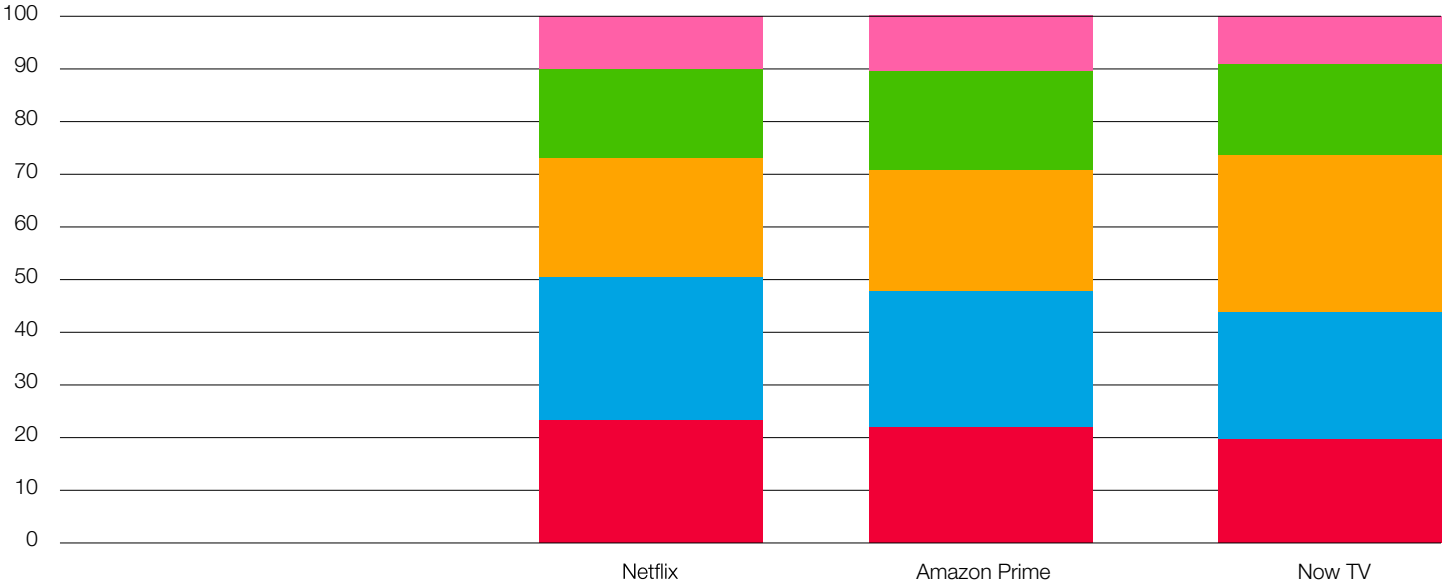
* UK population based on sample breakdown weighted to represent 18-64 year olds.

USER PROFILE FOR SELECTED SVOD SERVICES

Whilst there is a growing number of subscription on-demand and streaming services available to UK audiences, the market is dominated by three main providers, Netflix, Amazon Prime Video and Now TV. (Information on reach for these services is shown in the Digital video section of the Home Entertainment chapter.) The audience profile of users is fairly similar for all three services, with only small differences between them (Figure 9). Netflix has the youngest profile with 50.5% of its users aged under 35 and, although its user base still skews to the more affluent socio-economic grades, has the smallest share of ABC1 users of the top three SVoD providers.

Figure 9 User profile of selected SVoD services in the UK by age, 2018

% of group in audience



	Netflix	Amazon Prime	Now TV
Age 18-24	23.2	21.9	19.7
Age 25-34	27.3	25.9	24.1
Age 35-44	22.5	22.9	29.8
Age 45-54	17.0	18.9	17.3
Age 55-64	10.0	10.5	9.1
Men	47.6	49.8	47.9
ABC1	60.5	64.8	61.2

Source: Ampere Analysis, Consumer Survey 2018, UK adults (18-64). Base: (2,000)

Notes: This is the profile of all users, not just those that watch film.

Amazon Prime Video only includes subscribers who use the platform to watch videos, as opposed to those who solely subscribe to Amazon Prime for other non-video services.

FILM PREFERENCES ON SVOD PLATFORMS

Tables 16-20 show the top 10 titles with the highest average % of group in the total audience by gender and age group for films available to stream on UK SVoD services as a whole in 2018. The tables do not represent the films seen by the largest number of viewers within the gender or age group, but rather the films whose audience, regardless of size, delivered the highest proportion of each demographic.

Differences in preference by gender for films streamed through SVoD platforms mirror those of audiences for films shown at the cinema or on television. Female viewers over-index in the audience for films with strong female characters, romances and family friendly films, while male viewers over-index in the audience for action-driven titles. Interestingly, according to GfK data, the high-school set romantic comedy, *The Kissing Booth* (a Netflix production touted by the platform as one of its most watched originals in 2018) recorded no male audience members at all in the UK.

Table 16 Top 10 films with a significant above-average audience amongst females, films on SVoD, 2018

Title	Females as % of audience
The Kissing Booth*	100
Bridget Jones's Baby (UK)	97
The Princess Switch*	95
To All the Boys I Loved Before*	93
Nativity! (UK)	90
The Holiday	90
The Secret Life of Pets	89
The Girl on the Train	87
Bad Moms	87
Bridesmaids	87
Average % of SVoD audience for film	52

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)
Notes: Titles in italics have small base sizes. * Indicates title is a Netflix original.

Table 17 Top 10 films with a significant above-average audience amongst males, films on SVoD, 2018

Title	Males as % of audience
Star Trek Into Darkness	72
Rogue One: A Star Wars Story (UK)	63
Outlaw King* (UK)	63
Annihilation* (UK)	63
The Hunger Games: Catching Fire	61
Iron Man 3	61
Batman v Superman: Dawn of Justice	59
Star Wars: Episode VII - The Force Awakens (UK)	59
Captain America: The Winter Soldier	56
The Commuter (UK)	52
Average % of SVoD audience for film	48

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)
Notes: Titles in italics have small base sizes. * Indicates title is a Netflix original.

Reflecting the average age profile for SVoD services as a whole, Tables 18-20 show that most films generally attract a high proportion of those in the 18-34 age group. Preference by age also shows that younger audiences consume a greater number of Netflix original movies than those aged 35 or over, whose viewing choice is largely dominated by familiar titles. Interestingly, the Netflix originals over-indexing for 18-34 year olds were all romantic comedies, a key genre in the platform's commissioning strategy. Sequels to all three of the originals in the list – *To All the Boys I Loved Before*, *The Kissing Booth* and *The Princess Switch* – are scheduled for release on the platform in either 2019 or 2020. (All three titles also feature in the top 10 over-indexing films for female viewers.) The most viewed film on streaming platforms in 2018 overall, the Netflix original *Bright*, does not feature in any of these lists, indicating that it appealed across all groups.

Both older age groups showed a preference for UK films, with five UK titles in the top 10 for 35-54 year olds and four in the top 10 for the 55+ age group. The inclusion of the independent UK film *Paddington 2* in the 55+ age group top 10 is an interesting example of the ability of SVoD platforms to attract a different profile of audience from that delivered by a cinema release: 30% of the SVoD audience for *Paddington 2* was aged 55+, compared to 24% of its cinema audience in 2017.

Table 18 Top 10 films with a significant above-average audience in the 18-34 age group, films on SVoD, 2018

Title	18-34s as % of audience
To All the Boys I Loved Before*	91
The Kissing Booth*	81
White Chicks	75
Shrek	74
The Secret Life of Pets	70
Captain America: The Winter Soldier	69
The Princess Switch*	68
Iron Man 3	65
Fast & Furious 6 (UK)	64
Step Brothers	64
Average % of SVoD audience for film	49

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)

Notes: Titles in italics have small base sizes. * Indicates title is a Netflix original.

Table 19 Top 10 films with a significant above-average audience in the 35-54 age group, films on SVoD, 2018

Title	35-54s as % of audience
Jaws	74
Rogue One: A Star Wars Story (UK)	70
Moana	64
Jack Ryan: Shadow Recruit	62
The Lord of the Rings: The Fellowship of the Ring	60
The Girl on the Train	60
Charlie and the Chocolate Factory (UK)	58
Bridget Jones's Baby (UK)	58
Annihilation* (UK)	58
Nativity! (UK)	57
Average % of SVoD audience for film	34

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)
Notes: Titles in italics have small base sizes. * Indicates title is a Netflix original.

Table 20 Top 10 films with a significant above-average audience in the 55+ age group, films on SVoD, 2018

Title	55+s as % of audience
Star Trek Into Darkness	36
Outlaw King* (UK)	34
The Commuter (UK)	33
Star Wars: Episode VII - The Force Awakens (UK)	31
Paddington 2 (UK)	30
The Circle	30
John Wick	30
La La Land	28
Jack Ryan: Shadow Recruit	24
The Girl on the Train	23
Average % of SVoD audience for film	17

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)
Notes: Titles in italics have small base sizes. * Indicates title is a Netflix original.

Image: *La La Land* courtesy of Lionsgate Films

AUDIENCE PROFILE COMPARATIVE ANALYSIS

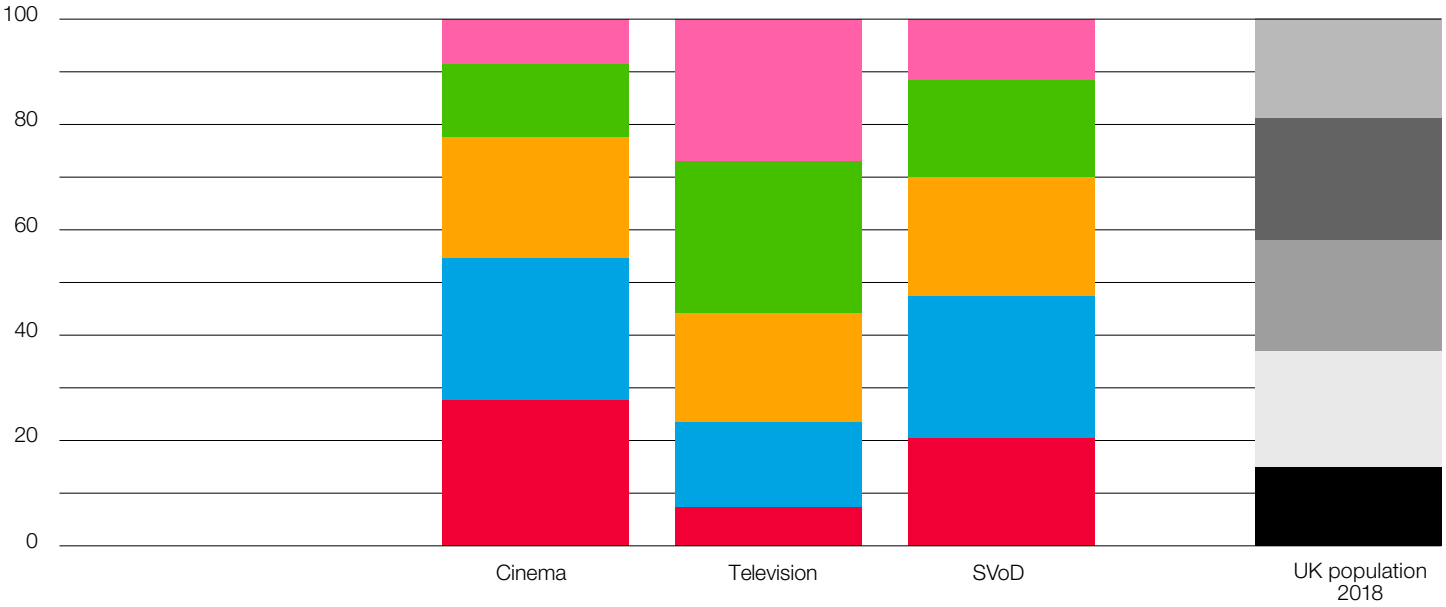
This chapter has focused on comparing demographic profiles and preferences of the audience for the three most used platforms that show film. However, due to the different methodologies used to collect the data and the different sampling criteria, it is difficult to draw any real comparisons between them. Figure 10 attempts to remove those differences by looking at a common core sample of 18-64 year olds. It should be noted that this is not single source data so we are unable to create overlaps in, for example, those who use all three platforms for watching film. In addition, the data for the SVoD services are for all content watched on these platforms, including television series and non-feature documentaries, so is not exclusively based on a 'film-only' audience.

Cinema delivers the youngest skewing audience profile, with 28% aged between 18-24 and each older age bracket steadily decreasing to just 8.5% aged between 55-64. The age profile for television is almost a mirror image of this, with 27% of the audience aged 55-64, increasing to 29% aged 45-54, and only 7% aged 18-24. This does not mean that young audiences are necessarily abandoning the small screen experience, as they over-index in the SVoD audience and access these services in the main by using a television set.

In terms of gender, all three platforms attract an audience not substantially different from the UK population as a whole, and which splits broadly equally between males and females. In socio-economic terms, television under-represents ABC1 viewers, in contrast to SVoD which attracts a more upmarket audience.

Figure 10 Comparative UK audience profiles: cinema, television and SVoD, 2018

% of group in audience



	Cinema	Television	SVoD	UK population 2018
Age 18-24	27.7	7.4	20.5	14.9
Age 25-34	26.9	16.2	26.9	22.0
Age 35-44	22.9	20.6	22.6	21.1
Age 45-54	14.0	29.0	18.6	23.0
Age 55-64	8.5	26.9	11.4	19.0
Male*	48.8	48.6	50.0	49.9
ABC1*	54.9	47.5	59.8	56.5

Source: CAA, BARB/TechEdge, Ampere Analysis, BFI analysis

Notes: CAA data based on all films released in 2018 and captured in the CAA's Film Monitor research. Titles (88), Base (19,270).

BARB/TechEdge data filtered on all titles transmitted on all BARB subscribed channels in 2018. Titles (7,323), UK adults (18-64), Base (6,668).

Ampere Analysis Consumer Survey 2018, Audience profile for all UK SVoD services. UK adults (18-64), Base (2,000).

* Based on adults aged 18-64.

SCREEN SECTOR CERTIFICATION AND PRODUCTION

Image: *Black Earth Rising* ©Forgiving Earth Ltd 2018

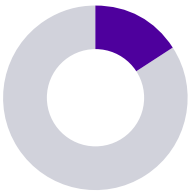
Facts in focus

FEATURE FILM PRODUCTION ACTIVITY IN THE UK IN 2018

53 inward investment films

UK spend
£1.6 billion

150 domestic UK films



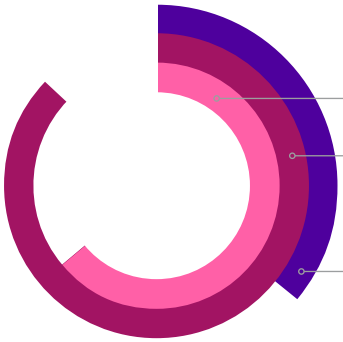
UK spend
£313 million

19 Co-productions

UK spend
£23 million

TOTAL UK SPEND OF FEATURE FILMS IN 2018

UK SPEND OF FEATURE FILMS AS % OF TOTAL PRODUCTION BUDGET

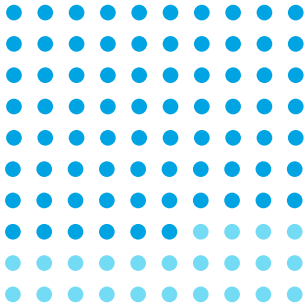


64% Inward investment films

87% Domestic UK films

36% Co-productions

BIG BUDGET PRODUCTIONS



21 feature films with budgets of £30 million or over accounted for

76% of total UK production spend

FILM PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

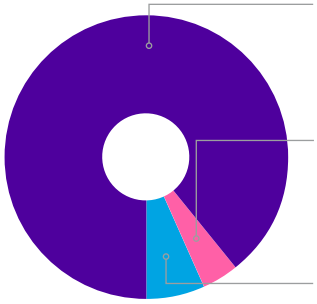
291
film projects
£2.6 billion
(estimated total budget)

2017

348
film projects
£3.4 billion
(estimated total budget)

2018

PRODUCTION VALUE OF UK QUALIFYING TELEVISION PROGRAMMES IN 2018



127 high-end television (HETV) projects, **UK spend £1.2 billion**

36 animated television projects, **UK spend £55 million**

60 children's television projects, **UK spend £88 million**

TELEVISION PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

2017
£1bn
estimated total budget

2018
£1.4bn
estimated total budget

99 television projects received final certification in **2018**, compared with **104 projects in 2017**

VIDEO GAME PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

212 video games
£278 million (estimated total budget)
2017

195 video games
£264 million (estimated total budget)
2018

Screen sector certification and production

QUALIFYING AS AN OFFICIAL BRITISH PRODUCTION

Film

To access UK film tax relief or be eligible for other public support, such as Lottery funding, a film must be certified as British. To qualify as British, a production must pass the cultural test for film (under Schedule 1 of the Films Act 1985) or be certified as an official co-production under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production. The cultural test has been in place since 2007, but was revised in 2014 to bring it in line with the more recent creative sector cultural tests.

The Secretary of State for Digital, Culture, Media and Sport is responsible for approving the issuing of interim and final certificates on the basis of recommendations made by the BFI Certification Unit. Projects seeking qualification under the cultural test may apply for interim certification either during production or when the project is complete, or may apply directly for final certification once the production has been completed and final documents submitted. Projects seeking qualification as official co-productions must apply for interim approval at least four weeks before principal photography begins and for final certification once the project is complete.

To qualify as British under the revised cultural test, films have to receive a requisite number of points based on UK or European Economic Area (EEA) cultural elements for content, contribution, hubs and practitioners. A wide range of films qualified as British under the cultural test in 2018, including *Colette, Isle of Dogs* and *Solo: A Star Wars Story.*

To qualify as British under one of the UK's official co-production agreements, films must be jointly certified by the appropriate authorities in each co-producing country. Each party co-producer is required to meet the criteria of the specific co-production agreement, which includes the creative, technical, artistic and financial input from each co-producer. Once certified, a film counts as a national film in each of the territories and may qualify for public support in that territory.

At the end of 2018, the UK had 12 active bilateral treaties in place, with Australia, Brazil, Canada, China, France, India, Israel, Jamaica, Morocco, New Zealand, the Occupied Palestinian Territories and South Africa. Official UK co-productions can also be certified under the European Convention on Cinematographic Co-production which allows for both bilateral and multilateral film co-productions. (In February 2019, the UK became a signatory to the revised Convention which enables European signatories to co-produce with partners outside of Europe without having to use bilateral co-production treaties. This will come into force following ratification by Parliament.) Films which received final co-production certification in 2018 included *The Devil Outside, Mary Magdalene* and *Mary Shelley*.

Television programmes

In 2013, the UK government introduced tax reliefs for high-end television (HETV) and animation programmes with the aim of boosting production investment in these creative sectors. (The cultural test for HETV programmes was revised in 2015.) Tax relief for children's television production was introduced in April 2015. To qualify as an official British HETV, animation or children's television production, projects must pass either the relevant cultural test (under Part 15A of the Corporation Tax Act 2009, as amended) or be certified as an official co-production under one of the UK's bilateral co-production agreements which allow television co-production. At the end of 2018, these were with Australia, Brazil, Canada, China, Israel, New Zealand, the Occupied Palestinian Territories and South Africa.

High-end television programmes receiving final certification in 2018 included *Black Earth Rising* (8 episodes), *Game of Thrones* – Series 7 (7 episodes) and *King Lear* (film for television). Animation and children's television programmes qualifying as officially British in the year included *Antur Natur Cyw* – Series 1 (10 episodes), *Horrible Histories* – Series 7 (15 episodes) and *Thunderbirds Are Go* – Series 2 (26 episodes).

Video games

In 2014, the UK government extended creative sector tax reliefs to include video games development. To qualify as officially British a video game must pass the relevant cultural test (under Schedules 17 and 18 of the Finance Act 2013). Official co-production treaties do not apply to the video games sector.

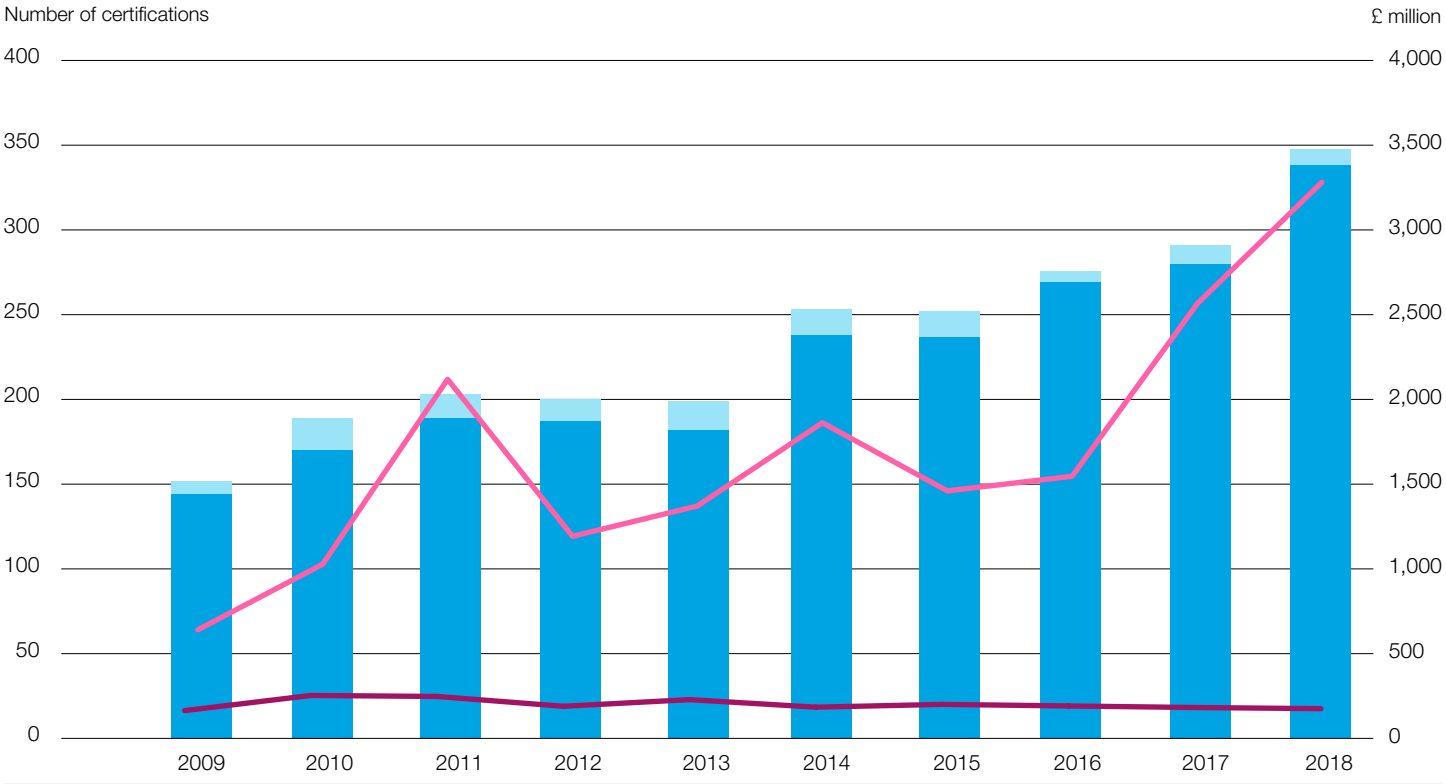
Video games awarded final certification in 2018 included *Forza Horizon 3*, *Hold the World with David Attenborough* and *Yooka-Laylee.*

FILMS WITH FINAL CERTIFICATION, 2009-2018

Due in part to a competitive tax regime, the number of UK films receiving final certification has risen substantially over the 10-year period, 2009-2018. As Figure 1 shows, the number of finally certified films in 2018 (348) is more than double the total in 2009 (152). There has also been a significant upward trend in the overall production budget associated with these films, which rose from £653 million in 2009 to £3.4 billion in 2018. This increase, particularly from 2017 onwards, is due primarily to a rise in the numbers of very high budget studio-backed films qualifying as British.

The numbers and overall budgets of co-productions with final certification remained low throughout the period. (While the dominant financing model for UK films in the first half of the 2000s, the volume of co-production activity in the UK fell dramatically after 2007 following a tightening in co-production certification requirements and the introduction of a new film production tax relief based on a film's UK spend rather than the entirety of the production budget.) Fewer than 20 co-productions were awarded final certification in any given year over the period.

Figure 1 Number and production budget of films with final certification, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Number of final certifications										
Cultural test	144	170	189	187	182	238	237	269	280	338
Co-production	8	19	14	13	17	15	15	7	11	10
Total	**152**	**189**	**203**	**200**	**199**	**253**	**252**	**276**	**291**	**348**
Production budget (£ million)										
Cultural test	604.8	1,001.7	2,118.3	1,169.7	1,353.3	1,856.0	1,443.9	1,532.7	2,573.4	3,308.7
Co-production	48.0	137.4	131.4	73.5	112.7	68.2	84.6	75.4	66.2	59.4
Total	**652.8**	**1,139.1**	**2,249.7**	**1,243.2**	**1,466.0**	**1,924.2**	**1,528.5**	**1,608.1**	**2,639.5**	**3,368.1**

Source: DCMS, BFI

Notes:

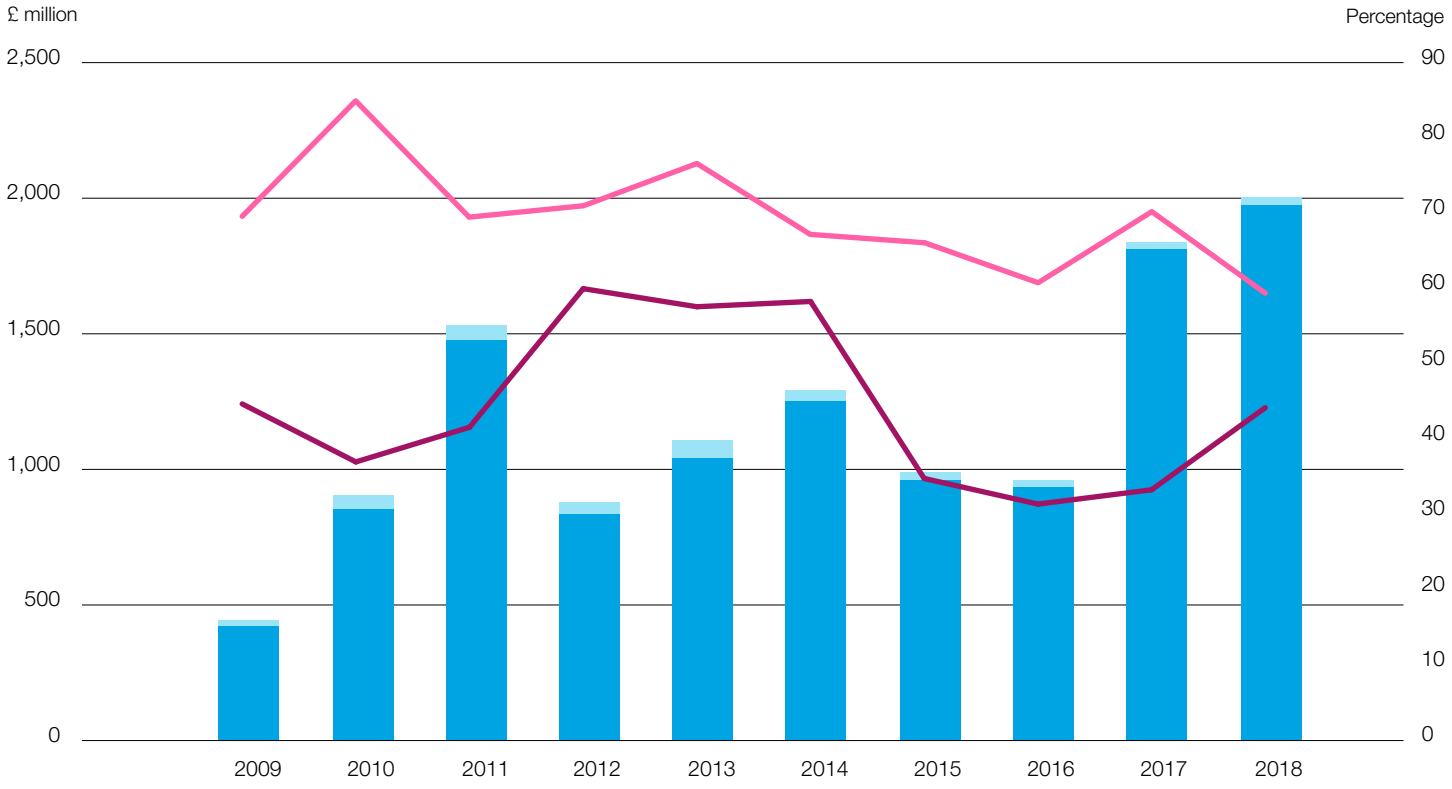
Total production budget is the sum of production activity in the UK and production activity outside the UK for cultural test films and total investment for co-productions.

Data updated since publication of the 2018 Statistical Yearbook.

Figure 2 shows the levels of UK spend associated with films receiving final certification between 2009 and 2018. (Although the latest cultural test amendments allow wider European Economic Area cultural elements for content to be taken into account when a film is applying for certification as British, tax relief is only awarded to expenditure which is used or consumed in the UK.) While the level of overall UK spend has varied in the past 10 years, there has been a significant increase from 2017, with 2018 recording a record high of £2 billion. The rise in overall UK production value is mainly due to the increase in the number of big budget films being certified under the cultural test.

As a percentage of total production budget, the UK spend of cultural test films has seen a downward trend from a high of 85% in 2010 to a low of 60% in 2018. The trends for co-productions are more unpredictable due to the small numbers of productions. In 2018, co-productions accounted for only 2% of the overall UK spend of films with final certification, compared with 5% in 2009.

Figure 2 UK spend of films with final certification and UK spend as % of total budget, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
UK spend										
Cultural test	422.9	853.8	1,478.5	834.2	1,041.2	1,252.8	959	936.3	1,813.6	1,975.5
Co-production	21.6	51.3	55.0	44.3	65.3	40.0	29.7	23.9	22.2	26.4
Total	**444.6**	**905.1**	**1,533.5**	**878.5**	**1,106.5**	**1,292.8**	**988.7**	**960.2**	**1,835.8**	**2,001.9**
UK spend as % of total production budget										
Cultural test	69.9	85.2	69.8	71.3	76.9	67.5	66.4	61.1	70.5	59.7
Co-production	45.0	37.3	41.9	60.3	57.9	58.6	35.1	31.7	33.6	44.5

Source: DCMS, BFI

Notes:

See note to Figure 1.

'UK spend' is the 'value of the production activities in the UK' for cultural test films and 'UK expenditure' for co-productions (bilateral and European Convention). UK spend for co-productions may include some expenditure on UK goods and services which took place outside the UK.

Data updated since publication of the 2018 Statistical Yearbook.

BUDGET DISTRIBUTION OF FILMS WITH FINAL CERTIFICATION, 2009-2018

Table 1 shows the median budgets of films receiving final certification between 2009 and 2018. In 2009, the median budget for cultural test films was £1 million but since then, as the number of these films has increased, the median budget has fallen steeply, plateauing at £300,000-£500,000 from 2010 onwards. The median budget for co-productions has been more varied over the period, peaking in 2009 at £6.3 million and with a low of £2.8 million in 2012. This variability is a result of the relatively small volume of co-production activity, as with low numbers the median is more susceptible to the effects of individual budgets. In 2018, the median budget for co-productions was £4.1 million, the fifth highest figure of the period.

Table 1 Median budgets of films with final certification, 2009-2018

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cultural test (£ million)	1.0	0.5	0.5	0.4	0.4	0.4	0.4	0.3	0.3	0.3
Co-production (£ million)	6.3	4.4	3.8	2.8	3.7	4.0	3.8	4.8	5.7	4.1

Source: DCMS, BFI

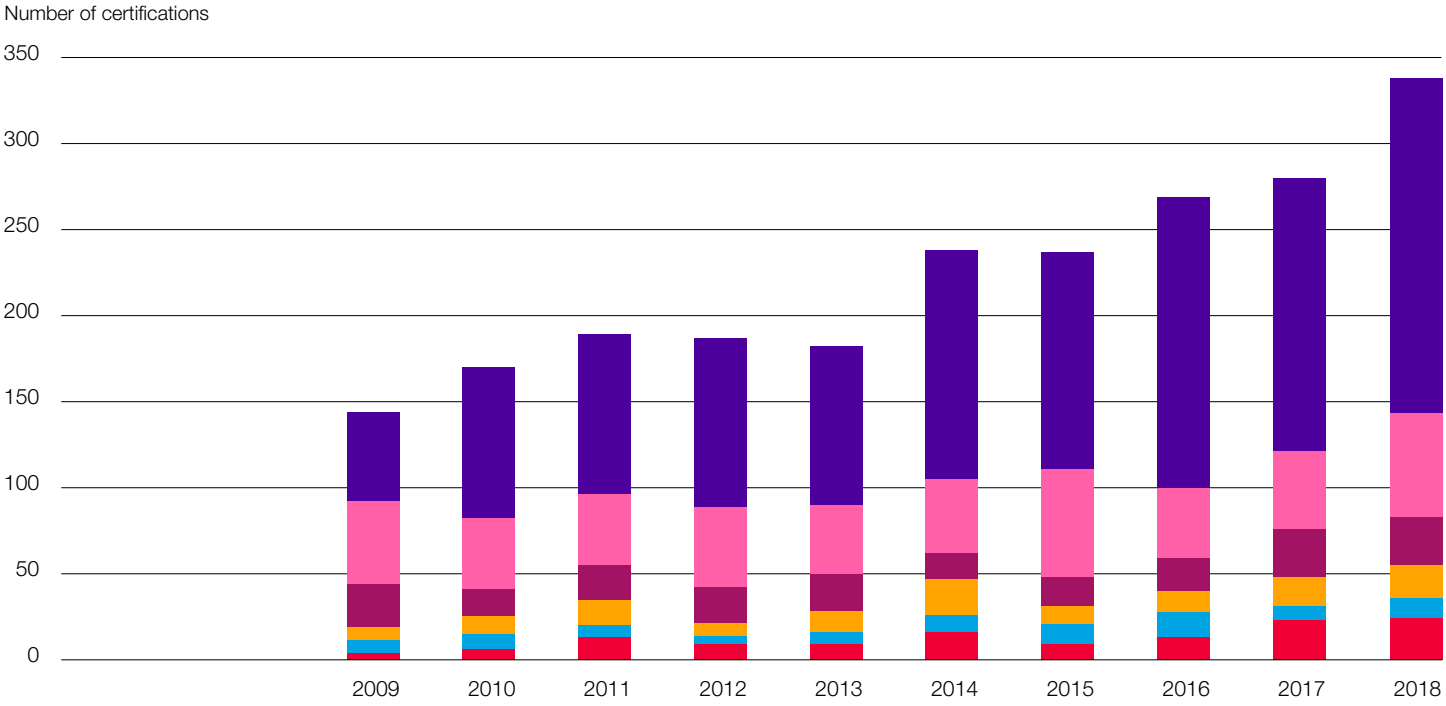
See note to Figure 1.

Image: *Mary Shelley* courtesy of Curzon Artificial Eye

Figure 3 shows that the reason for the decrease in the median budget for cultural test films between 2009 and 2018 is the growth in the number of very low budget (under £500,000) productions being awarded final certification. It should be noted that this does not reflect an increase in the overall numbers of very low budget films being produced in the UK (see Production section, Figure 7) but rather a rise in the numbers of completed projects in this budget category being submitted for certification. At the same time, the total number of high budget (over £10 million) films with final certification has also increased over the period, particularly coinciding with the recent changes to qualifying spend thresholds in the tax relief rules. From 2009-2013 an average of 15 high budget films received final certification each year, but since 2014 the average has been 28. In 2018, 36 high budget films received final certification, the highest number of the period.

As the annual numbers of film productions certified under the UK's co-production treaties during the period were low, figures are not disclosed to maintain confidentiality.

Figure 3 Films with final cultural test certification by budget band, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
≥ £30 million	4	6	13	9	9	16	9	13	23	24
£10-£29.9 million	7	9	7	5	7	10	12	15	8	12
£5-£9.9 million	8	10	15	7	12	21	10	12	17	19
£2-£4.9 million	25	16	20	21	22	15	17	19	28	28
£0.5-£1.9 million	48	41	41	47	40	43	63	41	45	60
<£0.5 million	52	88	93	98	92	133	126	169	159	195
Total	**144**	**170**	**189**	**187**	**182**	**238**	**237**	**269**	**280**	**338**

Source: DCMS, BFI

Note: Data updated since publication of the 2018 Statistical Yearbook.

Table 2 shows the distribution of budgets for all films certified under the cultural test in the 10-year period. The 6% of films with budgets of £30 million or over accounted for 78% of the aggregate budget, while the 75% of films with budgets of under £2 million accounted for only 4% of the aggregate budget.

Table 2 Films with final cultural test certification, distribution by budget band, 2009-2018

Budget band	Number	% number	Total budget (£ million)	% budget
≥ £30 million	126	5.6	13,237.3	78.0
£10-£29.9 million	92	4.1	1,442.9	8.5
£5-£9.9 million	131	5.9	948.6	5.6
£2-£4.9 million	211	9.4	674.1	4.0
£0.5-£1.9 million	469	21.0	471.5	2.8
<£0.5 million	1,205	53.9	188.3	1.1
Total	**2,234**	**100.0**	**16,962.6**	**100.0**

Source: DCMS, BFI

Note: Figures/percentages may not sum to totals due to rounding.

The budget distribution for co-productions with final certification between 2009 and 2018 is much more even than for cultural test films (Table 3). The majority of the aggregate budget (66%) is associated with films in the £5-29.9 million range, whereas films budgeted at £30 million or over only account for 14% of the total budget, compared with 78% for cultural test films. The table also highlights the small proportion of films with budgets of less than £500,000 (6%) compared with cultural test films (54%).

Table 3 Films with final co-production certification, distribution by budget band, 2009-2018

Budget band	Number	% number	Total budget (£ million)	% budget
≥ £30 million	3	2.3	120.1	14.0
£10-£29.9 million	20	15.5	326.7	38.1
£5-£9.9 million	33	25.6	240.0	28.0
£2-£4.9 million	39	30.2	136.2	15.9
£0.5-£1.9 million	26	20.2	31.5	3.7
<£0.5 million	8	6.2	2.2	0.3
Total	**129**	**100.0**	**856.6**	**100.0**

Source: DCMS, BFI

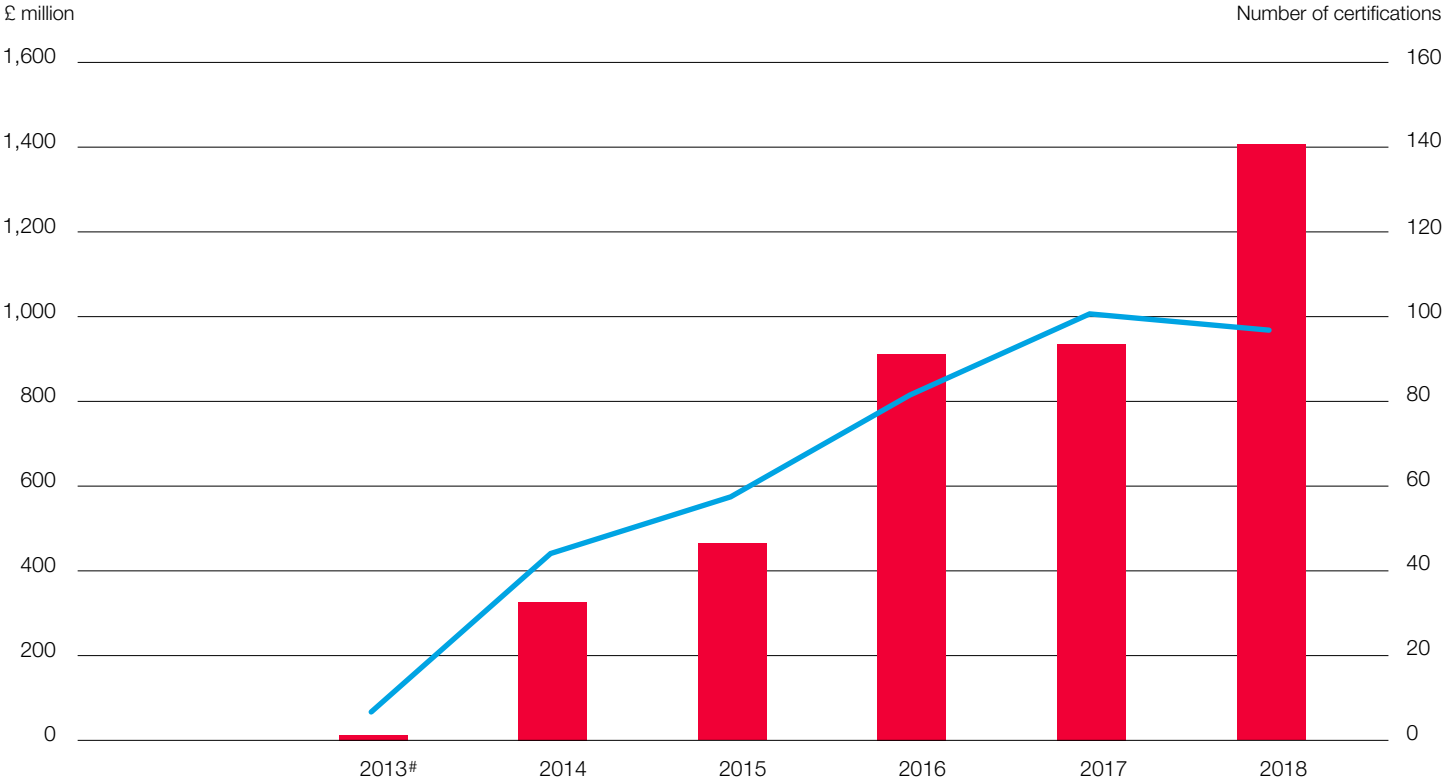
Note: Figures/percentages may not sum to totals due to rounding.

HIGH-END TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2013-2018

The number of HETV productions receiving final certification as British under the cultural test increased each year between 2013 and 2017, but fell slightly in 2018 (Figure 4). In that year, 99 qualifying HETV productions received final certification, down from 103 projects in 2017. However, the total budget associated with these projects increased from £935 million in 2017 to £1.4 billion, the highest figure recorded since the introduction of the tax relief in 2013.

As the annual numbers of HETV productions certified under the UK's co-production treaties have been consistently low over the period, figures are not disclosed to maintain confidentiality.

Figure 4 Total budget and number of HETV productions* with final cultural test certifications, 2013-2018



	2013#	2014	2015	2016	2017	2018
Total budget (£ million)	13.2	326.9	464.7	911.5	935.1	1,406.3
Number of certifications	5	44	58	83	103	99

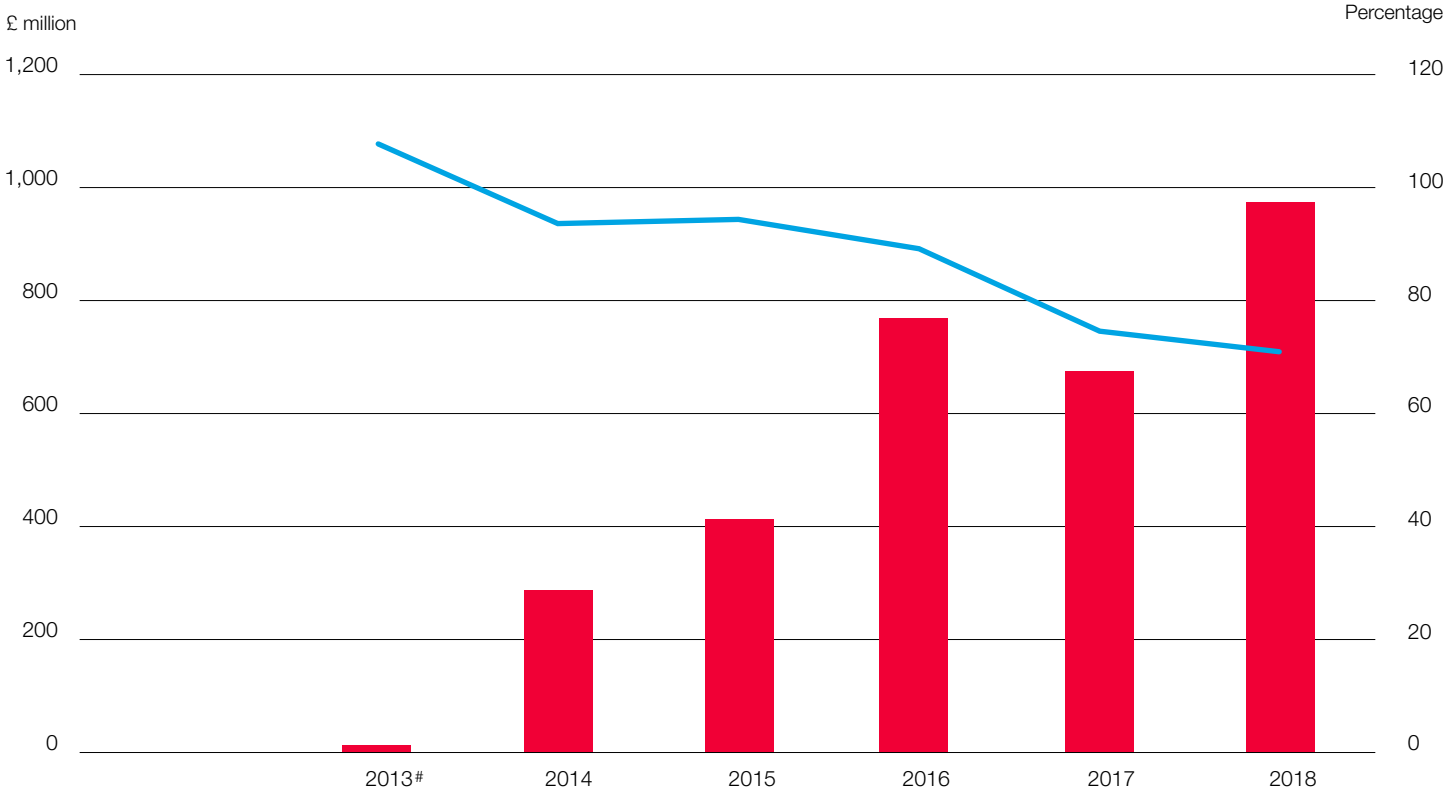
Source: DCMS, BFI

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

Figure 5 shows the total annual UK spend associated with HETV projects certified under the cultural test between 2013 and 2018. There has been an overall upward trend in the level of spend, with an increase from £13 million in 2013 to a record high of £975 million in 2018. As a percentage of total budget, however, the UK spend has decreased, indicating a rise in the number of HETV productions which make use of foreign locations and facilities. UK spend as a percentage of total budget fell from 100% in 2013 to just over 69% in 2018.

Figure 5 UK spend of HETV productions* with final cultural test certifications and UK spend as % of total budget, 2013-2018



	2013#	2014	2015	2016	2017	2018
UK spend (£ million)	13.2	288.2	412.7	768.9	675.5	974.6
UK spend as % of total budget	100.0	88.2	88.8	84.4	72.2	69.3

Source: DCMS, BFI

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

For the majority of the period (2013-2017), the average median budget per minute of HETV productions receiving final certification under the cultural test was around £22,000 (Table 4). In 2018, the median budget per minute reached a high of £25,721.

Table 4 Median budgets of HETV productions* with final cultural test certification, 2013-2018

Year	Median budget per minute (£)
2013#	15,786
2014	21,757
2015	21,203
2016	22,818
2017	22,764
2018	25,721

Source: DCMS, BFI

The median is the middle value, i.e. there are equal numbers of productions above and below the median.

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

Data updated since publication of the 2018 Statistical Yearbook.

ANIMATION TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2014-2018

As Table 5 shows, a total of 57 animation television productions received final certification as British under the cultural test in 2018, up from 39 productions in 2017 and the highest number of the period 2014-2018. (Data for 2013 is not shown to avoid disclosing budget details of individual productions.) The combined total budget for animations certified under the cultural test in 2018 was £76 million, up from £50 million in 2017, but below the highest year of the period, 2015, when the overall budget was £86 million. The associated UK production value increased from £43 million in 2017 to £53 million, second only to the £62 million reported for 2015. In 2018, the UK spend for these projects as a percentage of total budget was 69%, the second lowest share of the period.

As the annual numbers of animation television productions receiving final certification under the UK's co-production treaties have been low throughout the period, figures are not disclosed to maintain confidentiality.

The median budget per minute for animation television projects certified under the cultural test has averaged around £7,000 over the period. In 2018, the median budget per minute was £7,426.

Table 5 Animation television productions* with final cultural test certifications, 2014-2018

	2014	2015	2016	2017	2018
Number	14	51	38	39	57
Total budget (£ million)	21.5	86.4	62.2	50.2	76.0
UK spend (£ million)	10.5	62.2	44.5	42.8	52.5
UK spend as % of total budget	49.0	72.0	71.5	85.4	69.1
Median budget per minute (£)	7,327	7,000	8,548	3,836	7,426

Source: DCMS, BFI

Notes:

The median is the middle value, i.e. there are equal numbers of productions above and below the median.

* A production can be a single programme or a television series.

Data updated since publication of the 2018 Statistical Yearbook.

CHILDREN'S TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2016-2018

The volume and value of children's television productions with final cultural test certification have increased substantially since 2016 (Table 6). There were 87 final certifications in 2018 compared with 36 in 2016, while the total budget increased from £25 million in 2016 to £89 million. The UK spend associated with these projects saw similar increases, rising from £25 million to £86 million between 2016 and 2018. The UK spend as a percentage of total budget was higher for children's television projects than the other production categories in this analysis; in 2018 it was 97%. (Data for 2015 is not shown to avoid disclosing budget details of individual productions.)

As the annual numbers of children's television projects certified under the UK's co-production treaties in the period have been low, figures are not disclosed to maintain confidentiality.

The median budget per minute for children's television projects certified under the cultural test has shown less variance over the period than the other production categories. In 2018, the median budget per minute was £2,028.

Table 6 Children's television productions* with final cultural test certifications, 2016-2018

	2016	2017	2018
Number	36	65	87
Total budget (£ million)	25.4	49.9	89.1
UK spend (£ million)	25.0	46.2	86.2
UK spend as % of total budget	98.5	92.6	96.8
Median budget per minute (£)	1,952	1,793	2,028

Source: DCMS, BFI

Notes:

The median is the middle value, i.e. there are equal numbers of productions above and below the median.

* A production can be a single programme or a television series.

Data updated since publication of the 2018 Statistical Yearbook.

VIDEO GAMES FINAL CERTIFICATIONS, 2015-2018

A total of 195 video game projects received final certification as British in 2018, compared with 212 in 2017 (Table 7). The total budget for these projects was £264 million, down from £278 million in 2017, and the associated UK production value was £202 million, down from £249 million in 2017. The UK spend as a percentage of total budget for qualifying video games projects was 76.5% in 2018, down from 90% in both 2016 and 2017. (Data for 2014 is not shown to avoid disclosing budget details of individual projects.) Video games can only qualify as British for the purpose of the relief through the cultural test.

The median budget for video games with final certification in 2018 was £180,490, the highest of the period.

Table 7 Video games with final cultural test certification, 2015-2018

	2015	2016	2017	2018
Number	116	189	212	195
Total budget (£ million)	265.6	224.5	277.5	263.9
UK spend (£ million)	180.9	202.2	248.8	201.9
UK spend as % of total budget	68.1	90.1	89.7	76.5
Median budget (£)	110,902	171,584	142,425	180,490

Source: DCMS, BFI

Notes:

The median is the middle value, i.e. there are equal numbers of video game projects above and below the median.

Data updated since publication of the 2018 Statistical Yearbook

SCREEN SECTOR PRODUCTION IN THE UK

The remainder of this chapter looks at the value and volume of all feature film and UK qualifying television and video games production activity undertaken between 2009 and 2018. The data for individual years is not analogous with the certification statistics in the previous section as the latter cover only UK qualifying screen sector productions, and which may have begun principal photography (or in the case of video games, development) in years prior to the one in which final certification was awarded.

THE VALUE OF UK FILM PRODUCTION

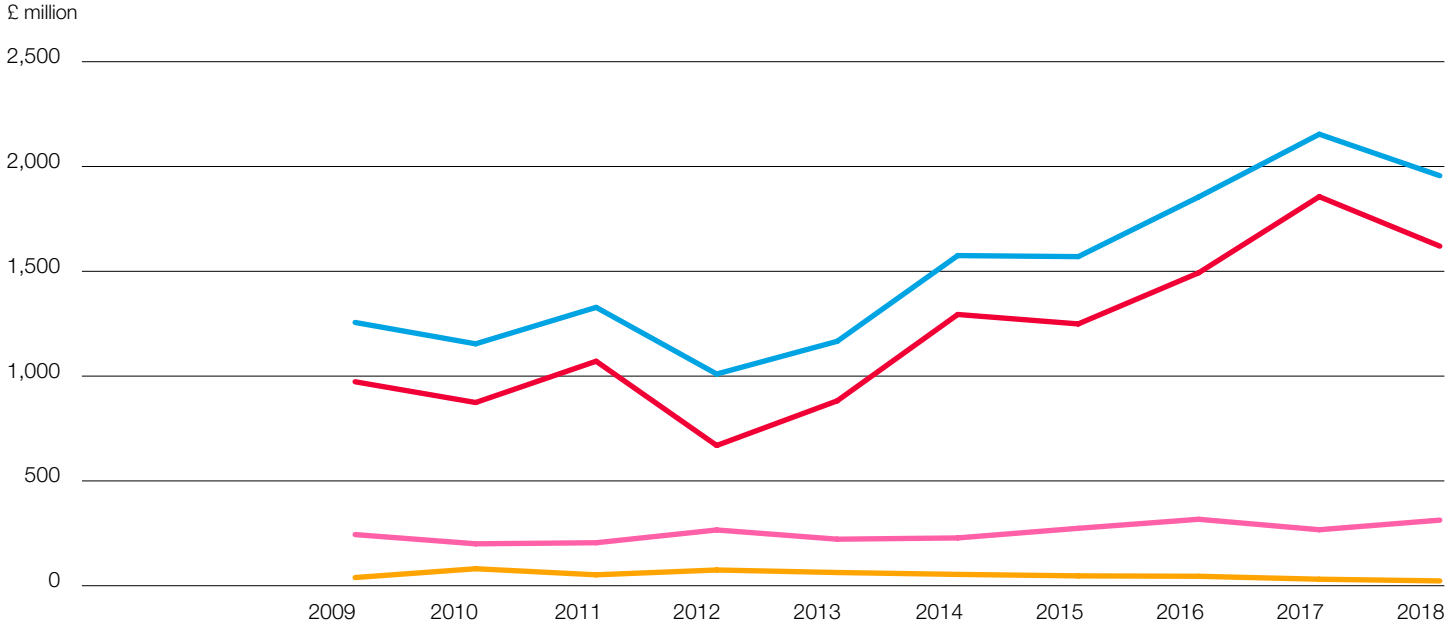
As Figure 6 shows, the aggregate UK spend of features that commenced principal photography in 2018 was £1.96 billion, second only to the record high of £2.15 billion achieved in 2017. (As there is often a delay in acquiring full data on production activity in the UK, the 2018 value of £1.96 billion is expected to be revised upwards; see notes to Figure 6.) 2018 was the fifth consecutive year to see record or near-record values for UK film production activity. The high figures of these years coincide with the extended tax relief for film introduced by the UK government in 2014.

The increase in UK film production spend since 2014 is due primarily to a surge in inward investment films. In 2018, these films contributed £1.6 billion towards the total UK production value, a decrease of 13% from £1.9 billion in 2017, but still the second highest figure on record. The proportion of overall UK spend attributed to inward features was 83%, down from 86% in 2017. Some of the big budget films contributing to this share were *Artemis Fowl, Fast & Furious Presents: Hobbs & Shaw* and *Star Wars: The Rise of Skywalker.*

Domestic UK features, including *Blinded by the Light*, *Radioactive* and *SAS: Red Notice*, had a UK production value of £313 million, up from £267 million in 2017, and the second highest value on record. The UK spend of official and un-official co-productions was £23 million, down from £31 million in 2017. Co-productions commencing principal photography in the year included *The Nest, Dirt Music* and the first non-documentary feature produced under the UK/China co-production treaty, *Special Couple*.

Image: *Artemis Fowl* ©2019 Disney Enterprises, Inc. All Rights Reserved

Figure 6 UK spend of feature films produced in the UK, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Inward investment	973	874	1,071	669	882	1,294	1,249	1,493	1,856	1,620
Domestic UK	244	200	205	266	222	228	274	317	267	313
Co-production	39	81	52	75	63	54	47	45	31	23
Total	**1,256**	**1,154**	**1,328**	**1,010**	**1,166**	**1,575**	**1,570**	**1,855**	**2,154**	**1,956**

Source: BFI

Notes:

Data are rounded to the nearest £1m so may not sum exactly to the totals shown and include only the UK spend associated with productions shot or post-produced partly or wholly in the UK.

Spend is allocated to the year in which principal photography started or to the year in which the visual effects were undertaken in the case of VFX-only films.

Inward investment feature films include inward co-productions and VFX-only films.

Includes films with budgets of under £500,000.

Data updated since publication of the 2018 Statistical Yearbook.

Due to the time lag in obtaining compete information on annual production activity, figures for 2018 are likely to be amended upwards in future publications. The delay is demonstrated in the updated figure for total UK spend in 2017, which in the 2018 Yearbook was reported as £2,002 million. This value has now increased to £2,154 million.

Figures may not sum to totals due to rounding,

Definitions:

An inward investment film is one which is substantially financed and controlled from outside the UK and which is attracted to the UK by script requirements (e.g. locations) and/or the UK's filmmaking infrastructure and/or UK film tax relief.

A domestic (indigenous) UK feature is a film made by a UK production company that is produced wholly or partly in the UK.

A co-production is a film made by companies from more than one country, often under the terms of a bilateral co-production treaty or the European Convention on Cinematographic Co-production.

Table 8 shows the split between UK studio-backed films and UK and foreign independent films made partly or wholly in the UK. In 2018, UK studio-backed films accounted for 67% (£1.3 billion) of overall production spend in the UK, an increase from 66% (£1.4 billon) in 2017. The 10-year average share for UK studio-backed film production spend is 68%.

Table 8 UK spend of UK studio-backed* and independent films produced in the UK, 2009-2018, £ million**

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
UK studio-backed films	955	845	1,039	669	770	1,015	1,042	1,014	1,428	1,304
Independent films	344	311	321	341	396	559	528	841	726	652
Total	**1,256**	**1,154**	**1,328**	**1,010**	**1,166**	**1,575**	**1,570**	**1,855**	**2,154**	**1,956**
% UK studio-backed films	76.0	73.2	78.2	66.2	66.0	64.5	66.4	54.7	66.3	66.7

Source: BFI

Notes:

* 'Studio-backed' means a UK film wholly or partly financed and controlled by a US studio but featuring UK cast, crew, locations, facilities, post-production and often UK sourced material.

** Films produced without creative or financial input from the major US studio companies. 'Independent' films here include both UK qualifying independent productions and non-UK independent productions.

The categories in this table differ to those in previous years when data for 'UK independent films' and 'non-UK films' were included separately.

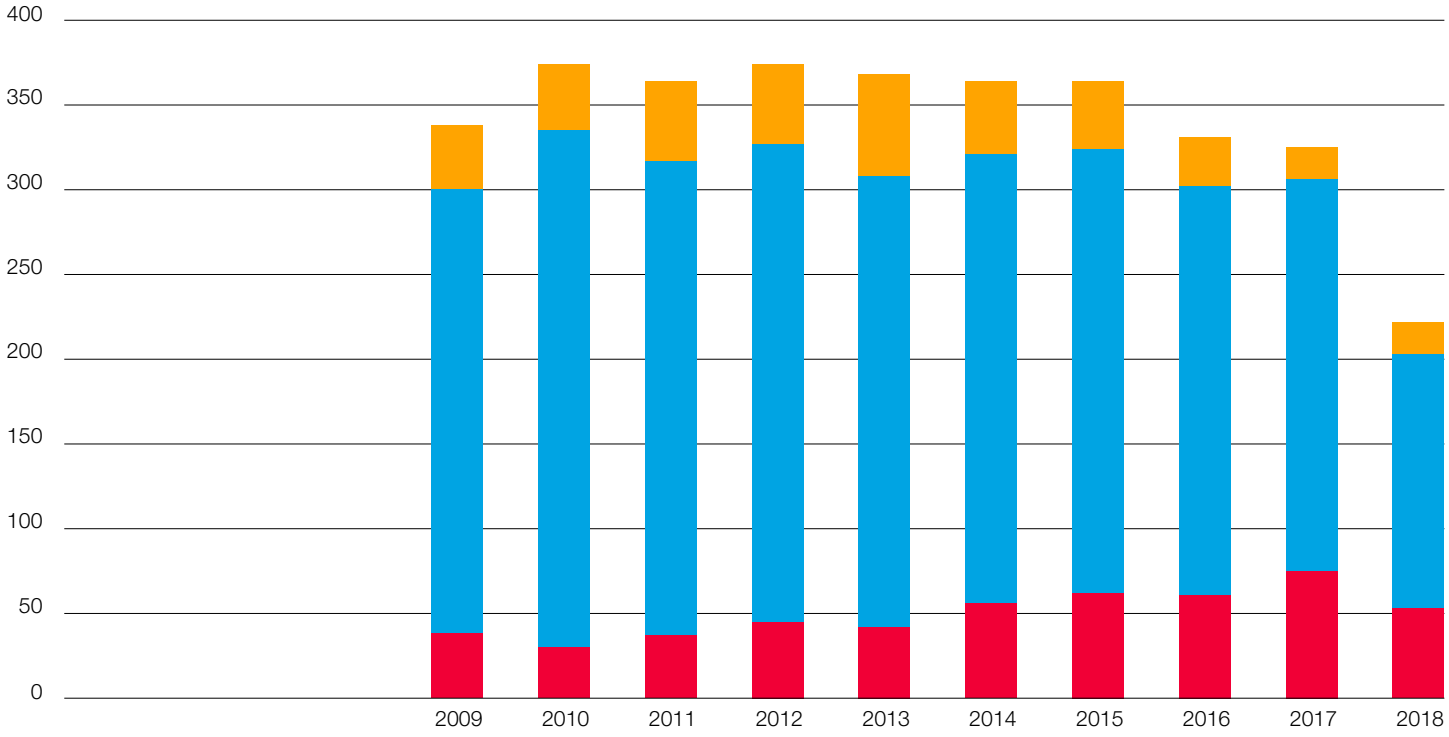
Data updated/recategorised since publication of the 2018 Statistical Yearbook.

THE VOLUME OF UK FILM PRODUCTION

In 2018, 222 films were produced wholly or in part in the UK, down from 325 in 2017. Of these, 19 were co-productions, 150 were domestic UK features (of which 64 had budgets of less than £500,000) and 53 were inward investment films (Figure 7). The biggest fall was in domestic UK films with budgets under £500,000, which decreased from 145 in 2017. However, as previously noted, there is often a delay in acquiring full data on production activity in the UK, particularly in the case of low and micro-budget features, so the number for 2018 is likely to be revised upwards.

Looking at the years prior to 2018, the impact of the extended tax relief for film introduced in 2014 is evident, with the number of inward investment films shooting in the UK increasing from an annual average of 37 (2009-2013) to 64 (2014-2017). The chart also highlights a continuing decline in the numbers of co-productions (for a number of years in the decade previous to the period covered in the chart, co-productions represented over half of all productions in the UK). The number of co-productions commencing photography has fallen from an annual average of 46 (2009-2013) to 33 (2014-2017). The volume of domestic productions has remained relatively steady throughout the period, although there has been a decline in the number of films with budgets of less than £500,000.

Figure 7 Number of feature films produced in the UK, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Inward investment	38	30	37	45	42	56	62	61	75	53
Domestic UK	262	305	280	282	266	265	262	241	231	150
Of which budget ≥ £500,000	90	77	91	77	71	83	93	91	86	86
Of which budget < £500,000	172	228	189	205	195	182	169	150	145	64
Co-production	38	39	47	47	60	43	40	29	19	19
Of which majority and parity co-production	13	25	24	25	34	17	17	9	7	4
Of which minority co-production	25	14	23	22	26	26	23	20	12	15
Total	**338**	**374**	**364**	**374**	**368**	**364**	**364**	**331**	**325**	**222**

Source: BFI RSU

Notes:

Inward investment includes inward investment co-productions and a small number of visual effects (VFX) only titles.

Data updated since publication of the 2018 Statistical Yearbook.

Includes both official and unofficial co-productions.

Definitions:

Majority co-production means a co-production in which the UK investment is the largest single national investment (not necessarily an absolute majority).

Parity co-production means a co-production in which the UK and at least one other country contributed equal largest investments.

Minority co-production means a co-production in which at least one other country made a larger investment than the UK.

Table 9 shows that UK and foreign independent films represented over 91% of all films produced in the UK in 2018, slightly lower than the 94% recorded for 2017. The number of UK studio-backed films (19) was the second highest of the period. (These films account for the majority of UK production spend.) Although the number of independent films (203) looks lower than in recent years, due to the delay in acquiring full data on low and micro-budget feature film activity this is likely to be revised upwards over time.

Table 9 Numbers of UK studio-backed* and independent** films produced in the UK, 2009-2018

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
UK studio-backed films	16	14	13	17	17	16	21	12	18	19
Independent films	322	360	351	357	351	348	343	319	307	203
Total	**338**	**374**	**364**	**374**	**368**	**364**	**364**	**331**	**325**	**222**
% UK studio-backed films	4.7	3.7	3.6	4.5	4.6	4.4	5.8	3.6	5.5	8.6

Source: BFI

* 'Studio-backed' means a UK film wholly or partly financed and controlled by a US studio but featuring UK cast, crew, locations, facilities, post-production and often UK source material.

** Films produced without creative or financial input from the major US studio companies. 'Independent films' here include both UK qualifying independent productions and non-UK independent productions.

The categories in this table differ to those in previous years when data for 'UK independent films' and 'non-UK films' were included separately.

Data updated/recategorised since publication of the 2018 Statistical Yearbook.

FILM PRODUCTIONS BY GENRE, 2016-2018

Table 10 and Figure 8 show a breakdown of UK film production by genre for the years 2016-2018. The documentary and drama genres accounted for the largest proportion of films, at 23% and 17.5% respectively, but only 1% and 7% of total UK spend. These were followed by comedy, which accounted for 10% of productions and 5% of UK spend, and thriller and horror, with 9% each of productions and 2% and 1% of respective UK spend. The biggest spending genre was action which accounted for 44% (£2.6 billion) of overall UK spend but only 8% of films.

Table 10 Genre of film production in the UK, 2016-2018 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend	% of total UK spend
Action	68	7.7	4,837.6	49.4	2,641.3	44.3
Drama	154	17.5	664.7	6.8	405.0	6.8
Biopic	45	5.1	449.0	4.6	332.9	5.6
Comedy	89	10.1	423.1	4.3	323.7	5.4
Family	8	0.9	424.9	4.3	322.8	5.4
Adventure	14	1.6	538.8	5.5	315.5	5.3
Animation	13	1.5	461.0	4.7	296.5	5.0
Musical	9	1.0	324.9	3.3	249.5	4.2
Sci-fi	21	2.4	366.8	3.7	219.5	3.7
Fantasy	11	1.3	255.5	2.6	193.9	3.3
Romance	39	4.4	258.4	2.6	179.9	3.0
Crime	36	4.1	289.5	3.0	177.3	3.0
Thriller	77	8.8	266.7	2.7	137.0	2.3
Documentary	199	22.7	106.9	1.1	84.1	1.4
Horror	77	8.8	70.4	0.7	52.6	0.9
War	8	0.9	29.0	0.3	23.9	0.4
Mystery	10	1.1	17.0	0.2	10.2	0.2
Total	**878**	**100.0**	**9,783.0**	**100.0**	**5,965.0**	**100.0**

Source: BFI

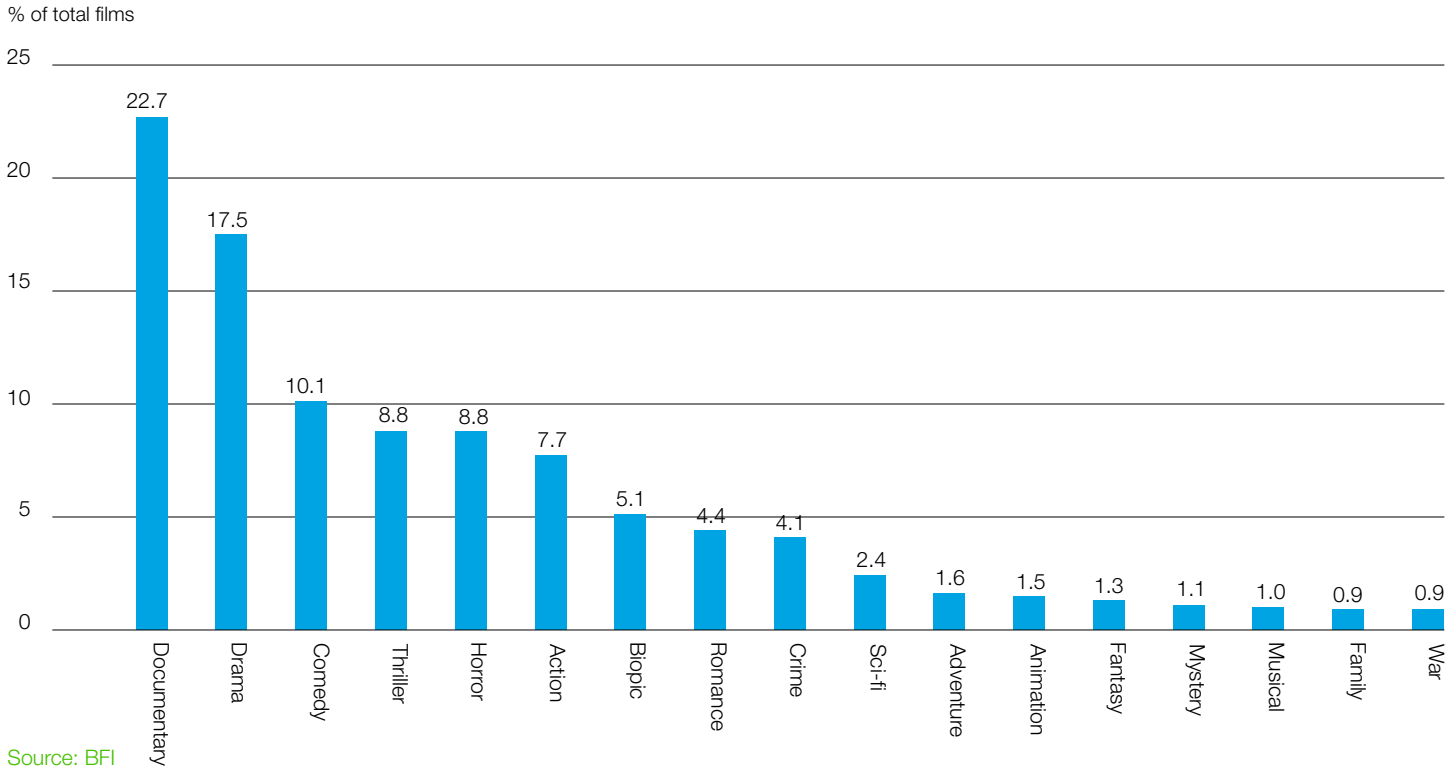
Notes:

The data have been presented for a three-year period to show as many genres as possible without disclosing the budgets of individual films.

'Mystery' is a new addition to the genre categories.

Figures/percentages may not sum to totals due to rounding.

Figure 8 Genre of UK film production, 2016-2018



Source: BFI

Table 11 shows the top 10 genres by share of UK spend for domestic UK films and inward investment/co-production titles. The data indicate a more even distribution of genres for domestic UK films compared with inward investment/co-production films. The top three genres by share of UK spend for domestic UK films – drama, comedy and biopic – accounted for 45.5% of total UK production value for these films while a single genre for inward investment/co-production films – action – accounted for 51% of the UK production value for this category.

Table 11 Top 10 genres for domestic UK and inward investment/co-production films, 2016-2018 (ranked by % UK spend)

Domestic UK		
Genre	**% of films**	**% of UK spend**
Drama	17.4	17.5
Comedy	10.0	16.2
Biopic	3.1	11.8
Documentary	28.8	8.0
Action	4.8	7.6
Family	0.8	7.5
Thriller	9.3	7.4
Animation	0.8	5.0
Crime	4.0	4.8
Total top 10	**78.9**	**85.6**
Total other genres	**21.1**	**14.4**
Total films = 622		

Inward investment & co-production		
Genre	**% of films**	**% of UK spend**
Action	14.8	50.8
Adventure	2.7	6.1
Family	1.2	5.0
Animation	3.1	5.0
Drama	18.0	4.9
Musical	1.6	4.6
Biopic	10.2	4.5
Sci-fi	2.7	3.9
Fantasy	1.6	3.7
Total top 10	**55.9**	**88.6**
Total other genres	**44.1**	**11.4**
Total films = 256		

Source: BFI

Notes:

The data have been limited to the top 10 ranking genres due to disclosure reasons.

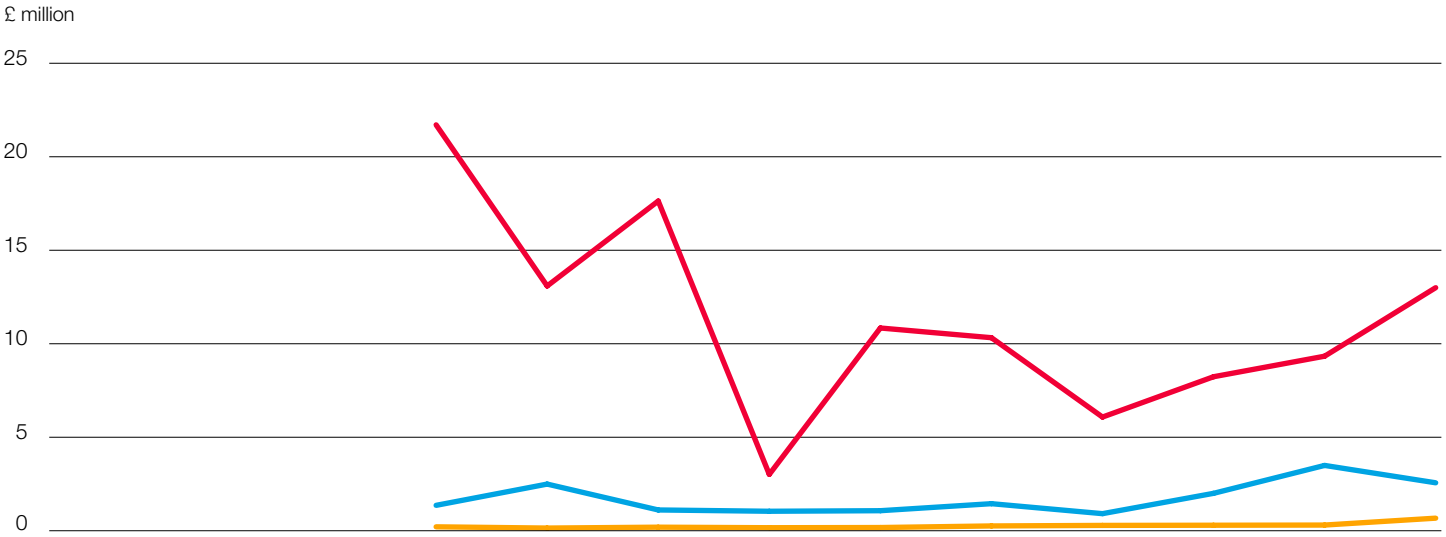
See notes to Table 10.

Image: *Fast & Furious Presents: Hobbs & Shaw* ©2019 Universal Pictures. Courtesy of Universal Studios Licensing LLC

BUDGET TRENDS

The median budget for domestic features in 2018 was £690,000, a significant increase from £300,000 in 2017 (Figure 9). It should be noted, however, that the 2018 median is likely to be revised downwards, due to the delay in acquiring budget data for low and micro-budget productions. The median budget for inward investment features was £13 million, up from £9.3 million in 2017, while for co-productions the median budget was £2.6 million, down from a period high of £3.5 million in 2017.

Figure 9 Median feature film budgets, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Inward investment	21.72	13.09	17.64	3.00	10.84	10.32	6.07	8.23	9.33	13.00
Domestic UK	0.20	0.13	0.18	0.15	0.16	0.25	0.28	0.29	0.30	0.69
Co-production	1.35	2.50	1.10	1.03	1.06	1.44	0.90	2.00	3.51	2.57

Source: BFI

Notes:

Median budget is the middle value of budgets (i.e. there are equal numbers of films above and below the median). The median in this case is a better measure of central tendency than the mean, as it avoids the upward skew of a small number of high budget productions.

Includes films with budgets of less than £500,000.

Data in this table are shown to two decimal places to gain a clearer picture of change over the period for domestic UK films.

Data updated since publication of the 2018 Statistical Yearbook.

SIZE DISTRIBUTION OF BUDGETS

The budget size distribution for the three main categories of films made in 2018 is shown in Tables 12 to 14.

As Table 12 shows, the 20 inward investment features with budgets of £30 million or over (38% of all inward features) accounted for 89% of the total budget for this category. There were 16 inward features with budgets of less than £5 million (30% of inward features), which accounted for 2% of the total budget for these films.

Table 12 Size distribution of budgets, inward investment features, 2018

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£30 million	20	2,256.0	89.3
£10-£29.9 million	10	168.2	6.7
£5-£9.9 million	7	52.5	2.1
£2-£4.9 million	14	47.7	1.9
<£2 million	2	2.5	0.1
Total	**53**	**2,526.9**	**100.0**

Source: BFI

Note: Figures/percentages may not sum to totals due to rounding

Forty per cent of domestic UK features (60) had budgets of less than £500,000 in 2018, while 17 productions (11% of domestic UK projects) had budgets of £5 million or over (Table 13). The domestic UK films in the highest budget band accounted for 58% of this category's aggregate budget, while those in the lowest budget band accounted for 4%.

Table 13 Size distribution of budgets, domestic UK features, 2018

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	17	208.0	57.8
£2-£4.9 million	30	92.3	25.6
£0.5-£1.9 million	43	46.2	12.8
<£0.5 million	60	13.5	3.7
Total	**150**	**360.0**	**100.0**

Source: BFI

Note: Figures/percentages may not sum to totals due to rounding.

The majority (68%) of co-productions filmed in the UK in 2018 had budgets of between £2 million and £10 million, but the four co-productions in the £5-£10 million range accounted for almost half (48%) of the total budget (Table 14). Co-productions with budgets of under £500,000 accounted for less than 1% of the aggregate budget.

Table 14 Size distribution of budgets, co-productions, 2018

Budget band	Number	Total budget in band (£ million)	% of total budget
£5-£10 million	4	30.6	47.5
£2-£4.9 million	9	28.0	43.4
£0.5-£1.9 million	6	5.4	8.3
<£0.5 million		0.5	0.8
Total	**19**	**64.4**	**100.0**

Source: BFI

Notes:

The number of co-productions with budgets under £2 million has been aggregated for disclosure reasons, due to the low numbers in the individual budget bands.

Figures may not sum to totals due to rounding.

BIG BUDGET PRODUCTIONS, 2009-2018

The importance to the UK film economy of a small number of big budget productions – usually inward investment films – is demonstrated in Table 15. Between 2014 and 2018 an average of 22 big budget films were produced annually, and they accounted for an average of 76% of UK production spend. This compares to an average of 15 big budget films produced annually from 2009 to 2013, with an average share of UK spend of 71%. In 2018, the 21 films with budgets of £30 million or over accounted for 76% of UK production spend, slightly down from 80% in 2017, but still the third highest share of UK spend attributed to this budget category since our records began. The majority (20) of these films were inward investment features.

Table 15 Big budget films' contribution to UK spend, 2009-2018

	Number of films with budgets ≥£30 million	Value of associated UK spend (£ million)	Total UK spend (£ million)	Big budget film % of UK spend
2009	17	887.4	1,256.1	70.6
2010	13	846.9	1,154.3	73.4
2011	17	1,009.8	1,327.7	76.0
2012	10	634.3	1,009.6	62.8
2013	16	817.0	1,165.9	70.1
2014	20	1,157.1	1,574.7	73.5
2015	16	1,119.4	1,570.2	71.3
2016	25	1,453.1	1,840.3	79.0
2017	29	1,719.2	2,157.8	79.7
2018	21	1,484.1	1,956.0	75.9

Source: BFI

Notes:

Figures may not sum to totals due to rounding.

Data updated since publication of the 2018 Statistical Yearbook.

UK SPEND AS PERCENTAGE OF TOTAL PRODUCTION BUDGET

Table 16 shows UK spend as a percentage of total production budget for inward investment films, domestic UK films and co-productions over the past decade. UK domestic films have consistently had the highest proportion of UK spend while co-productions have had the lowest. The greatest variation in UK spend as a percentage of total budget, however, is seen in inward investment productions. In 2018, the UK spend of domestic films was 87% of total budget, for inward investment films it was 64%, and for co-productions it was 36%.

Table 16 UK spend as percentage of total production budget, 2009-2018

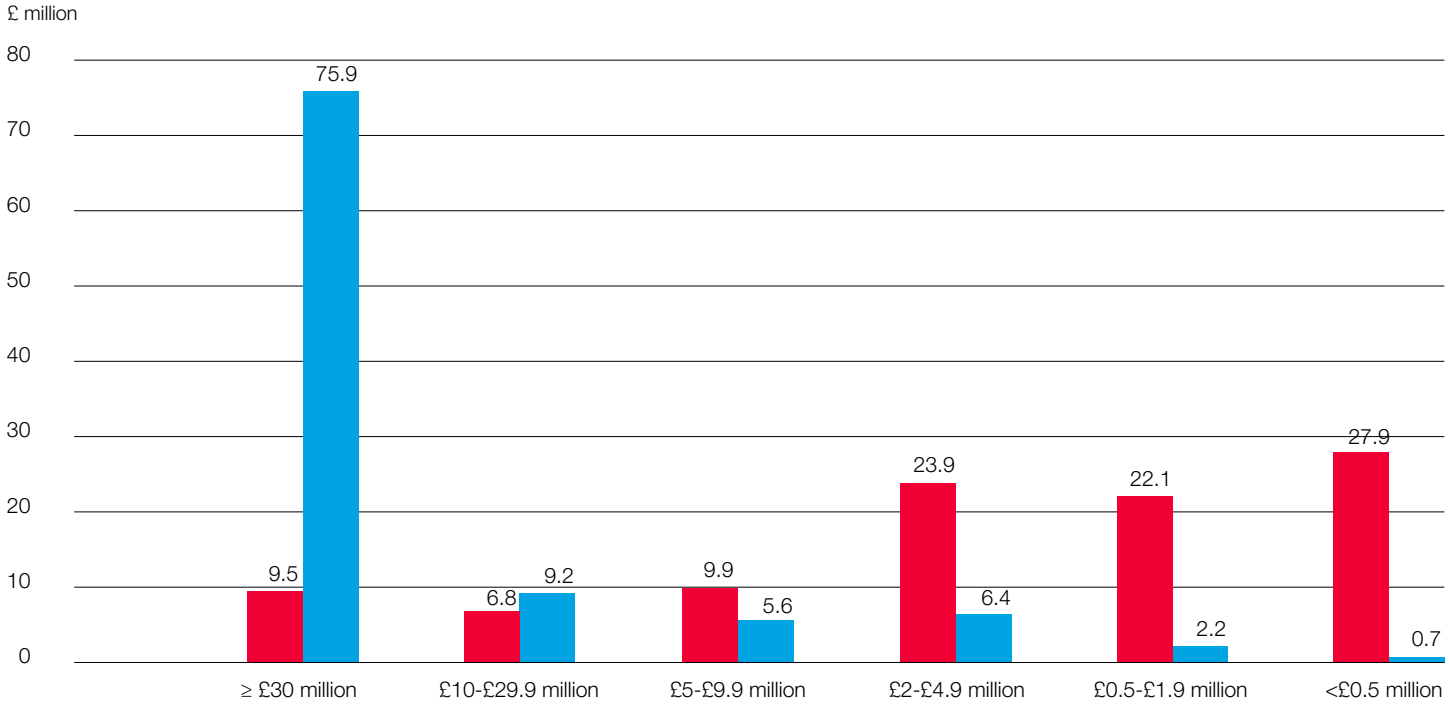
	Inward investment	Domestic UK	Co-production
2009	53.0	81.5	43.5
2010	71.9	89.9	42.1
2011	55.9	86.7	36.0
2012	64.0	88.7	46.0
2013	68.8	85.6	45.2
2014	57.2	78.8	34.1
2015	60.1	89.0	40.2
2016	61.0	79.7	33.5
2017	53.6	85.9	39.4
2018	64.1	86.8	36.2

Source: BFI

Note: Data updated since publication of the 2018 Statistical Yearbook.

Figure 10 underlines that a small proportion (9.5%) of titles with a UK spend of £30 million or over are responsible for the majority (76%) of UK production spend. Conversely, the 28% of films with a UK spend of less than £500,000 represent less than 1% of production investment in the UK.

Figure 10 Percentage of productions and UK spend by category of UK spend, 2018



Source: BFI

% of productions % of UK spend

DOMESTIC UK PRODUCTIONS BY TERRITORY OF SHOOT

Table 17 shows that the majority of domestic UK productions beginning principal photography in 2018 (110 out of 150) were shot exclusively in the UK, while 40 were shot partly or wholly outside the country. The non-UK spend of domestic productions in 2018 as a proportion of their total budget was 13% (the same as in 2017).

Table 17 Domestic UK productions by territory of shoot, 2018

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	110	249.8	1.6	0.7
UK and other	27	74.2	20.5	27.6
Other only	13	36.0	25.2	70.0
Total domestic UK films	**150**	**360.0**	**47.0**	**13.2**

Source: BFI

Note: Figures may not sum to totals due to rounding.

Table 18 shows the number of shoots by territory for domestic UK films in 2018. Because some films were shot in two or more territories, the total number of shoots is greater than the total number of films. Outside of the UK, the most popular production territories were the USA, France, Germany and Hungary. The territories in the table range from Europe and North America to the Middle East and Asia, reflecting the wide range of stories being told by UK filmmakers.

Table 18 Domestic UK productions, shoots by territory or region, 2018

Territory of shoot	Number of shoots
UK	137
USA	13
France	6
Germany	4
Hungary	4
Spain	3
China	2
India	2
Republic of Ireland	2
Japan	2
Lebanon	2
Netherlands	2
Other Europe	3
Other	12
Total shoots	**194**

Source: BFI

CO-PRODUCTIONS BY TERRITORY OF SHOOT

In contrast to UK domestic productions, co-productions were usually shot partly or wholly abroad (Table 19). Only two out of 19 films, with a total budget of £3.3 million, were shot wholly in the UK. Non-UK spend accounted for 64% of the total budget of co-productions in 2018.

Table 19 Co-productions by territory of shoot, 2018

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	2	3.3	0.4	12.7
UK and other	10	41.5	26.6	64.0
Other only	7	19.6	14.1	71.8
Total	**19**	**64.4**	**41.1**	**63.8**

Source: BFI

The territory distribution of co-production shoots is shown in Table 20. The majority of shoots were in the UK or elsewhere in Europe. Of the non-European shoots, four were in Australia and two were in Afghanistan.

Table 20 Co-productions, shoots by territory or region, 2018

Territory of shoot	Number of shoots
UK	14
Republic of Ireland	6
Australia	4
Poland	4
Afghanistan	2
Other Europe	7
Other	4
Total shoots	**41**

Source: BFI

PRODUCTION COMPANY ACTIVITY LEVELS

UK film production in 2018 was dispersed among a large number of production companies, as shown in Table 21. The BFI Research and Statistics Unit recorded 372 production companies associated with films shot in the UK or co-productions involving the UK in the year, a decrease from 421 in 2017. Of these, 335 companies (90%) were associated with a single feature. These were a mixture of distinct production companies and special purpose vehicles (i.e. companies set up to make a single film).

Table 21 Film production company activity, 2018

Number of features per company	Number of companies
5	1
4	1
3	5
2	30
1	335
Total	**372**

Source: BFI RSU

Note: Includes all production categories.

THE VALUE AND VOLUME OF HIGH-END TELEVISION PRODUCTION

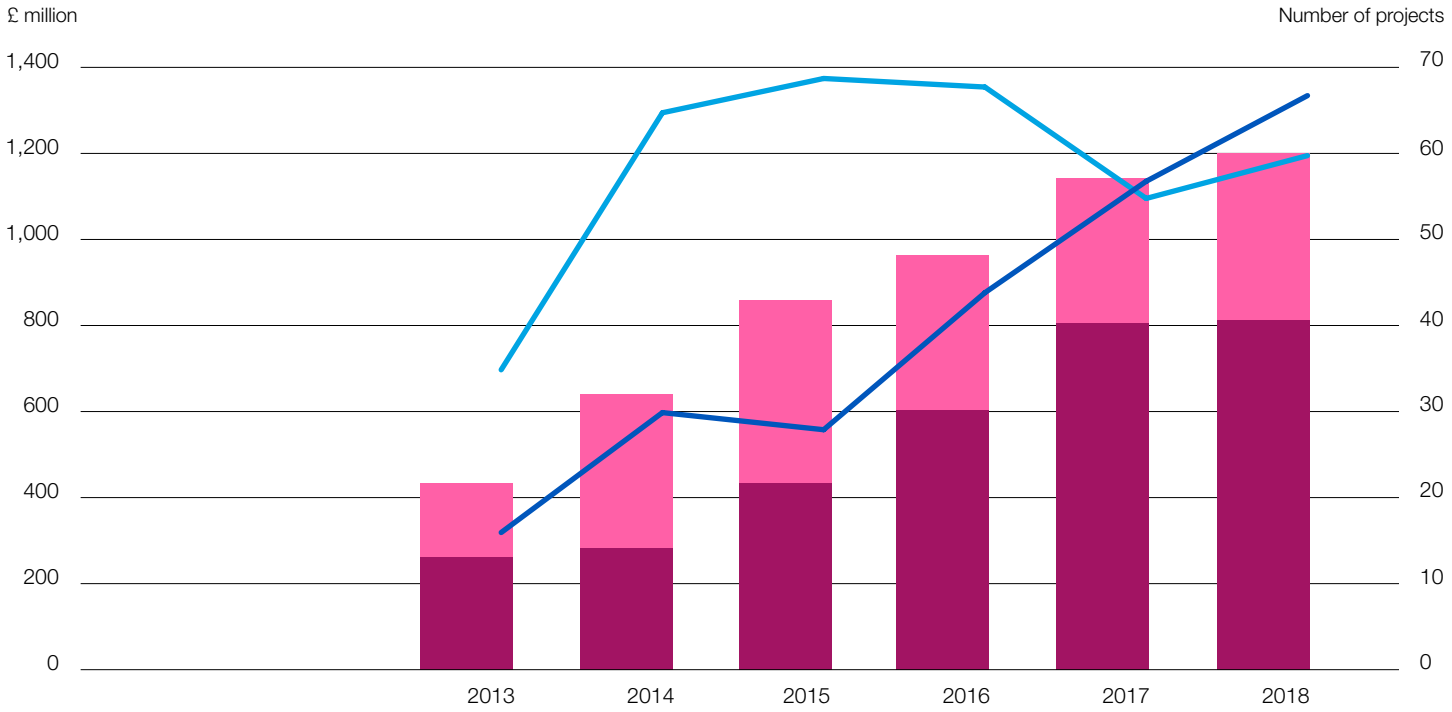
Figure 11 shows the number of UK qualifying HETV programmes produced between 2013 and 2018 and their associated UK spend. (It should be noted that, as the tax relief for HETV production came into force on 1 April 2013, the data for that year represents production activity for only part of the year.)

The UK production value associated with UK qualifying HETV programmes has been on an upward trend since the introduction of the tax relief. UK production spend was £1.2 billion in 2018, up 5% compared with 2017 and an increase of 87% on 2014 (the first full year of data). For all years except 2014, co-productions and inward investment projects generated the majority of UK production spend. In 2018, this category represented 68% of the total UK spend. Co-productions and inward investment projects contributed £811 million to the total UK production value in 2018, up from £805 million in 2017, while domestic UK productions contributed £388 million, up from £338 million in 2017.

For most of the period, the total number of qualifying HETV projects produced in the UK increased year on year. Of the 127 projects produced in 2018, 67 were co-production or inward investment projects and 60 were domestic UK projects. This was the second year that the number of non-domestic productions was greater than the number of domestic productions but, as with feature films, the figures for recent years are likely to be revised as more detailed information on production activity becomes available.

Co-production and inward investment HETV productions shooting in the UK in 2018 included *Four Wedding and a Funeral* (10 episodes), *His Dark Materials* – Series 1 (10 episodes) and *Killing Eve* – Series 2 (8 episodes). Domestic UK productions included *Curfew* (8 episodes), *Unforgotten* – Series 3 (6 episodes) and *Years and Years* (6 episodes).

Figure 11 UK spend and number of UK qualifying HETV productions*, 2013-2018



	2013	2014	2015	2016	2017	2018
UK spend domestic UK (£ million)	172.8	357.8	426.4	360.5	337.5	388.2
UK spend co-production & inward investment (£ million)	261.0	282.2	432.5	602.9	805.0	811.3
Total UK spend (£ million)	**433.8**	**640.0**	**858.9**	**963.4**	**1,142.4**	**1,199.5**
Number of domestic UK projects	35	65	69	68	55	60
Number of co-production & inward investment projects	16	30	28	44	57	67
Total number of projects	**51**	**95**	**97**	**112**	**112**	**127**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.

Data for co-production and inward investment projects have been combined to avoid disclosing budget data for individual titles.

The data for 2013 cover the period April – December.

Data updated since publication of the 2018 Statistical Yearbook.

SVOD-BACKED HIGH-END TELEVISION PRODUCTION

As the previous chart has shown, the rise in value of UK qualifying HETV productions between 2013 and 2018 is due largely to an increase in international commissions. A key driver of this growth is the surge in demand for digital original series for first-run showing on SVoD platforms. To gauge the impact of this new funding stream on the UK HETV production sector, Table 22 shows the number of UK qualifying HETV projects produced or co-produced by the two leading stand-alone streaming platforms - Netflix and Amazon Prime - from 2015-2018, and their associated UK spend. The table includes data for both original SVoD productions (used here to describe projects fully funded by the platforms) and co-partnered productions (co-productions with traditional broadcasters and other investors).

While the overall numbers of productions backed by these two platforms has remained relatively small throughout the period, the UK production value associated with these projects has been significant, with a total investment of £684 million for 2015-2018. The UK spend of HETV SVoD-backed productions was £205 million in 2018, down 19% compared with 2017 but an increase of 149% on 2015. As a share of overall UK spend for qualifying HETV productions, the production value of SVoD-backed projects increased from 10% in 2015 to 17% in 2018 (with 2017 recording a peak of 22%).

In 2018 SVoD-backed HETV productions include the Amazon Prime original series, *Hanna* (8 episodes), the Netflix original series *Sex Education* (8 episodes), and the fifth series of *Peaky Blinders*, a Netflix/BBC co-production (6 episodes).

Table 22 Value and volume of SVoD-backed HETV productions*, 2015-2018

	2015	2016	2017	2018
UK spend of original SVoD HETV projects (£ million)	66.3	125.7	115	141.9
UK spend of SVoD co-partnered HETV projects (£ million)	15.7	17.0	139.2	62.8
Total UK spend of SVoD-backed projects (£ million)	**82.2**	**142.7**	**254.2**	**204.7**
Total UK spend of all HETV projects (£ million)	**858.9**	**963.4**	**1,142.4**	**1,199.5**
SVoD-backed UK spend as % of total	9.6	14.8	22.3	17.1
Number of original SVoD HETV projects	c	c	9	c
Number of SVoD co-partnered HETV projects	c	c	8	c
Total number of SVoD-backed projects	**5**	**9**	**17**	**14**
Total number of HETV projects	**97**	**112**	**112**	**127**
SVoD-backed projects as % of total	5.2	8.0	15.2	11.0

Source: BFI SVoD companies: Netflix and Amazon

Notes:

* A production can be a single programme or a television series.

An original SVoD production is one exclusively financed by the SVoD platform.

A co-partnered SVoD production is a co-production with other broadcasters/investors.

'c' indicates the data have been suppressed due to low numbers to avoid disclosing details of individual projects.

Image: *Killing Eve* ©Sid Gentle Films 2018

GENRE OF HIGH-END TELEVISION PRODUCTIONS

Table 23 shows a breakdown of 2018 UK qualifying HETV productions by genre. (It should be borne in mind that unlike the section on feature film production genres, comparisons here can be between single television programmes and series rather than stand-alone productions). Drama was the most popular genre for HETV projects accounting for 37 productions (29% of the total) and a UK spend of £338 million (28% of the total). Comedy and crime were the next most popular genres in terms of volume of production with respective shares of 19% and 17% of the total, while thriller and crime accounted for the second and third largest shares of associated UK spend with 18% and 15% of the total UK production value.

Table 23 Genre of UK qualifying HETV productions*, 2018 (ranked by UK spend)

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	37	29.1	471.0	27.5	337.9	28.2
Thriller	18	14.2	293.9	17.2	210.7	17.6
Crime	21	16.5	236.3	13.8	184.9	15.4
Comedy	24	18.9	130.6	7.6	104.2	8.7
Fantasy	3	2.4	179.7	10.5	99.2	8.3
Action	6	4.7	172.3	10.1	91.2	7.6
Romance	3	2.4	69.4	4.1	60.9	5.1
Sci-fi	3	2.4	45.0	2.6	34.7	2.9
Biopic	5	3.9	38.2	2.2	33.5	2.8
Documentary	4	3.1	36.0	2.1	13.7	1.1
Other	3	2.4	40.2	2.4	28.6	2.3
Total	**127**	**100.0**	**1,712.6**	**100.0**	**1,199.5**	**100.0**

Source: BFI

Notes:

* A production can be a single programme or a television series.

The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.

Other includes Adventure, Family, Horror, Musical, Mystery, and War. Data is combined to avoid disclosing budget details of individual projects.

Figures/percentages may not sum to totals due to rounding.

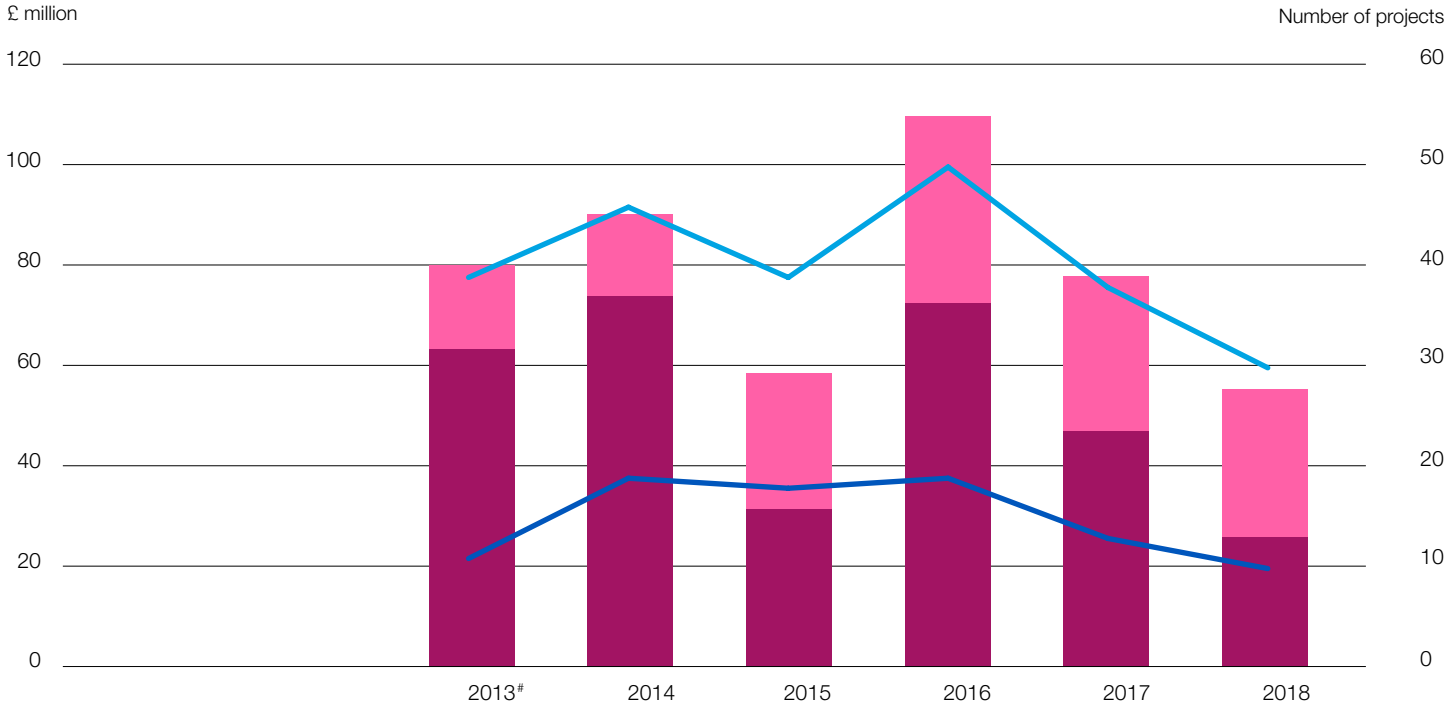
THE VALUE AND VOLUME OF ANIMATED TELEVISION PRODUCTION

Figure 12 shows the number of UK qualifying animation television programmes produced between 2013 and 2018 and their associated UK spend. (As the tax relief for this type of production came into force on 1 April 2013, the data for that year represents production activity for only part of the year.)

In 2018, the total UK production spend for UK qualifying animation programmes was £55 million, down 29% compared with 2017 (£78 million) and a 50% decline on the period high achieved in 2016 (£110 million). It should be noted, however, that these figures are likely to be revised upwards as more data become available. Domestic projects accounted for the majority of UK production value for qualifying animations each year throughout the period with the exception of 2018, when the share of overall UK spend was 47%.

A total of 36 UK qualifying animation projects began production in 2018, down from 47 in 2017, and the lowest figure of the period. There were 28 domestic UK projects and eight co-production and inward investment projects. UK domestic titles going into production in the year included *Bing* – Series 4 (27 episodes). *Clangers* – Series 3 (26 episodes) and *Horrid Henry* – Series 5 (42 episodes), while co-production and inward investment titles included *Chip and Potato* (40 episodes), *Norm of the Forest* (52 episodes) and *The Totems* – Series 1 (52 episodes).

Figure 12 UK spend and number of UK qualifying animated television productions*, 2013-2018



	2013#	2014	2015	2016	2017	2018
UK spend domestic UK (£ million)	63.2	73.9	31.3	72.4	47.0	25.9
UK spend co-production & inward investment (£ million)	16.7	16.3	27.1	37.3	30.7	29.4
Total UK spend (£ million)	**79.8**	**90.2**	**58.4**	**109.7**	**77.8**	**55.3**
Number of domestic UK projects	37	44	37	48	36	28
Number of co-production & inward investment projects	9	17	16	17	11	8
Total number of projects	**46**	**61**	**53**	**65**	**47**	**36**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced.

Data for co-production and inward investment projects have been combined to avoid disclosing budget information for individual titles.

Data updated since publication of the 2018 Statistical Yearbook.

* A production can be a single programme or a television series.

The data for 2013 cover the period April-December

Figures may not sum to totals due to rounding.

THE VALUE AND VOLUME OF CHILDREN'S TELEVISION PRODUCTION

Table 24 shows the UK spend associated with the production of UK qualifying children's television programmes between 2015 and 2018. (As the tax relief for children's television programmes came into force on 1 April 2015, the data for that year represents production activity for only part of the year.)

In 2018, the UK production spend of qualifying children's television projects was £88 million, up from £68 million in 2017. Domestic UK productions accounted for the majority of UK spend across the period.

Table 24 UK spend of UK qualifying children's television productions*, 2015-2018 (£ million)

	2015#	2016	2017	2018
Domestic UK	35.9	46.5	44.9	c
Co-production and inward investment	7.6	24.4	23.3	c
Total	**43.4**	**70.9**	**68.3**	**88.1**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.

Data for co-production and inward investment projects have been combined to avoid disclosing budget information for individual titles.

Data updated since publication of the 2018 Statistical Yearbook.

'c' indicates the data have been suppressed to avoid disclosing details of individual projects.

* A production can be a single programme or a television series.

The data for 2015 cover the period April – December.

Figures may not sum to totals due to rounding.

A total of 60 UK qualifying children's television projects went into production in 2018, the majority of which were domestic UK productions (Table 25). While the table suggests a decline in the volume of projects since 2016, it should be borne in mind that the most recent figures are likely to be revised upwards. Titles going into production in 2018 included *Nyela's Dream* (26 episodes), *So Awkwar*d – Series 5 (13 episodes) and *The Worst Witch* – Series 3 (13 episodes).

Table 25 Number of UK qualifying children's television productions*, 2015-2018

	2015#	2016	2017	2018
Domestic UK	62	68	55	c
Co-productions and inward investment	6	11	6	c
Total	**68**	**79**	**61**	**60**

Source: BFI

See notes to Table 24.

Data updated since publication of the 2018 Statistical Yearbook.

'c' indicates the data have been suppressed due to low numbers to avoid disclosing details of individual projects.

* A production can be a single programme or a television series.

The data for 2015 cover the period April – December.

THE VALUE AND VOLUME OF VIDEO GAMES DEVELOPMENT

Table 26 shows the UK spend associated with the development of UK qualifying video game projects between 2014 and 2018. (As the tax relief for video games came into force on 1 April 2014, the data for that year represents development activity for only part of the year.)

In 2018, the UK spend of qualifying video games was £46 million, a sharp fall from £215 million in 2017. It should be noted, however, that as further data become available the figures for the most recent years are likely to be revised upwards. The breakdown between domestic UK and inward investment games in 2018 is not shown due to the low number of inward investment projects but, as in previous years, domestic UK developments accounted for the largest share of UK production value.

Table 26 UK spend of UK qualifying video games, 2014-2018

	2014#	2015	2016	2017	2018
Domestic UK	250.0	193.7	496.1	11.3	c
Inward investment	123.4	60.7	83.0	203.9	c
Total	**373.4**	**254.4**	**579.2**	**215.3**	**46.1**

Source: BFI

Notes:

Projects are allocated to the year principal development commenced.

Data updated since publication of the 2018 Statistical Yearbook.

'c' indicates the data have been suppressed due to low numbers to avoid disclosing details of individual projects.

The data for 2014 cover the period April – December.

Table 27 shows the number of video game developments decreasing since 2016. It should be noted that there is a significant lag in the collection of data related to this category, so the number of developments for the most recent years is likely to be revised upwards. Again, the breakdown between inward investment and domestic UK projects in 2018 is not shown due to the low number of inward investments but, as in previous years, domestic UK video games accounted for the majority of developments. UK qualifying video games which began development in 2018 included *Kodiak Fishing*, *Mafia II* and *Ugly Dolls*.

Table 27 Number of UK qualifying video games, 2014-2018

	2014#	2015	2016	2017	2018
Domestic UK	254	259	305	163	c
Inward investment	16	10	14	4	c
Total	**270**	**269**	**319**	**167**	**26**

Source: BFI

See notes to Table 26.

Data updated since publication of the 2018 Statistical Yearbook.

The data for 2014 cover the period April – December.

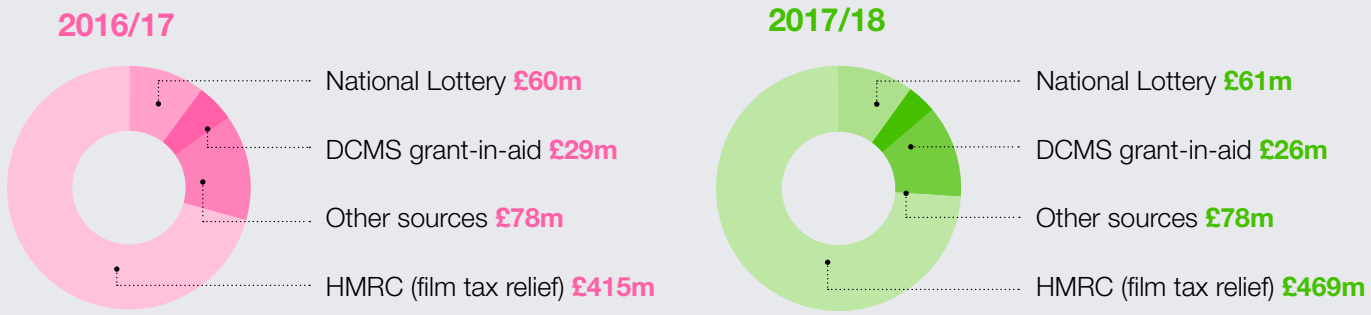
PUBLIC INVESTMENT IN FILM IN THE UK

Image: *Misbehaviour* courtesy of Pathé UK

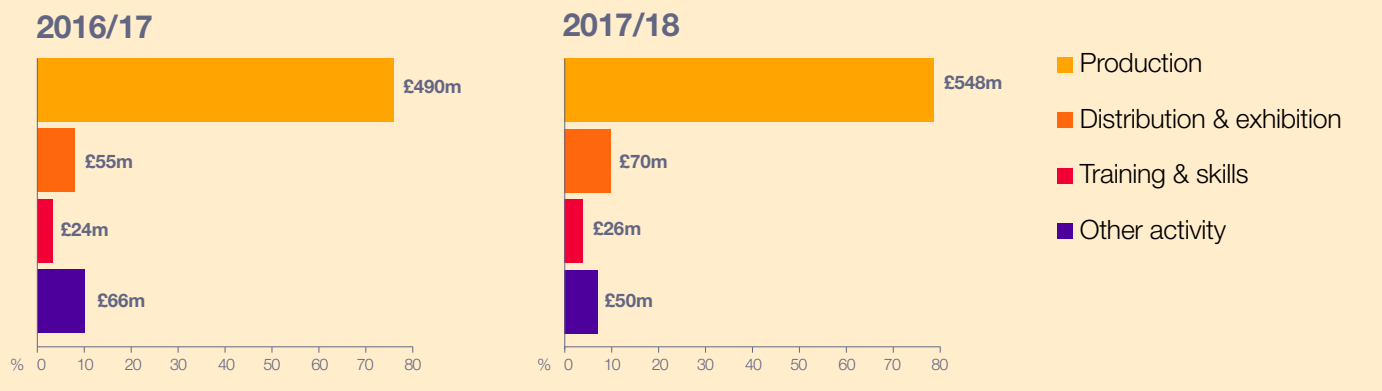
Facts in focus

PUBLIC FUNDING FOR FILM IN THE UK

Total estimated public funding available for film in the UK in **2017/18** was **£634 million**, an increase of **9%** from **£582 million** in **2016/17**.



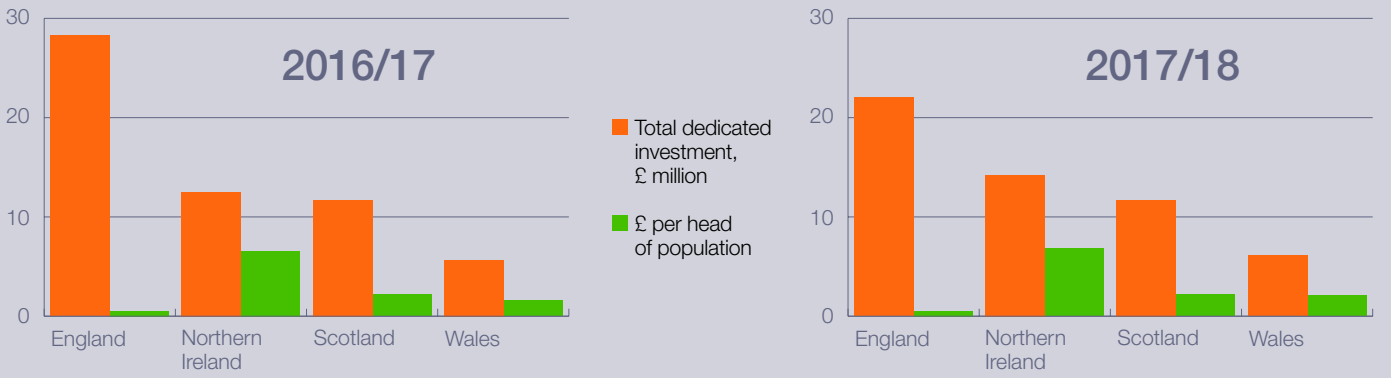
ACTIVITIES SUPPORTED BY PUBLIC FUNDING FOR FILM IN THE UK



In 2017/18, **86%** of investment in film production came from the film production tax relief, up from **85%** in 2016/17.

SPEND ACROSS THE NATIONS

For both 2016/17 and 2017/18, in cash terms funding dedicated solely to film activity in the individual nations of the UK was greatest in England but per capita investment was highest in Northern Ireland.



Public investment in film in the UK

PUBLIC FUNDING FOR FILM IN THE UK BY SOURCE

Table 1 outlines the estimated levels of available public funding for film in the UK from 2015/16 to 2017/18. (The figures do not include some types of local authority, research council, higher or further education funding.)

The total public funding available for film in 2017/18 is estimated to have been £634 million, up from £582 million in 2016/17. The largest single source of public funding in the year was the UK film tax relief, which provided £469 million (74% of the total). This was followed by the National Lottery (£61 million; 10% of the total) and grant-in-aid (£26 million; 4% of the total) from the Department for Digital, Culture, Media and Sport (DCMS) to the BFI and the National Film and Television School (NFTS). Funding from DCMS in 2017/18 was lower than in the previous two financial years, which accords with a broader decrease in UK government grant-in-aid investment.

Publicly owned national broadcasters and their film arms also made substantial investments: Film4/Channel 4 provided funding of just over £25 million for UK film in 2017/18, while BBC Films/BBC provided funding of £11 million.

Investment from Arts Council England (ACE) in 2017/18 was £8 million. (This is a substantial decrease from funding of just over £13 million in the previous financial year, but is still up from the £4.7 million reported for 2015/16). ACE funding includes National Portfolio investments into organisations and venues which form part of the national infrastructure for the arts (this element is relatively unchanged from 2016/17) alongside project awards from Grants for the Arts and other schemes (the level of successful moving image project applications to these selective schemes varies substantially from year to year).

The European Union (EU) provided investment of £5.4 million for UK film activity, of which £4.4 million came from Creative Europe's MEDIA sub-programme in 2017 (see note to Table 1) and £1 million was via the structural funds in 2017/18. Investment from these funds, which include the European Regional Development Fund and European Social Fund, increased compared with 2016/17 (£0.5 million) but was substantially down from £7.6 million in 2015/16. This reflects a general decline in investment from EU structural funds across the UK's screen sectors.

Image: *Peterloo* courtesy of eOne Films

Table 1 Public funding for film in the UK by source, 2015/16 - 2017/18 (ranked by 2017/18 spend)

	2015/16		2016/17		2017/18	
Agency	£ million	%	£ million	%	£ million	%
National Lottery Distribution Fund[1]	75.4	14.4	59.6	10.3	60.7	9.6
DCMS grant-in-aid	26.4	5.0	28.5	4.9	26.1	4.1
Film4/Channel 4[2]	26.1	5.0	25.7	4.4	25.4	4.0
Northern Ireland Executive	13.0	2.5	11.4	2.0	13.7	2.2
BBC Films/BBC[3]	10.5	2.0	10.4	1.8	11.3	1.8
Arts Council England (ACE)[4]	4.7	0.9	13.1	2.3	8.0	1.3
European Union (EU) MEDIA sub-programme[5]	3.8	0.7	4.0	0.7	4.4	0.7
Scottish Government	5.1	1.0	3.9	0.7	3.9	0.6
Welsh Government	3.1	0.6	3.2	0.6	3.5	0.6
Higher education funding[6]	1.8	0.3	2.7	0.5	2.7	0.4
Local government[7]	0.2	<0.1	2.1	0.4	2.4	0.4
Foreign and Commonwealth Office	1.5	0.3	1.3	0.2	1.1	0.2
Other EU[8]	7.6	1.5	0.5	0.1	1.0	0.2
Department for International Trade	0.4	0.1	0.2	<0.1	0.2	<0.1
National/regional development agencies	1.7	0.3	0.1	<0.1	0.1	<0.1
Department for Business, Energy and Industrial Strategy	3.3	0.6	<0.1	<0.1	<0.1	<0.1
Other public sector[9]	0.1	<0.1	<0.1	<0.1	<0.1	<0.1
Total public sector selective investment[10]	**184.7**	**35.3**	**166.7**	**28.7**	**164.7**	**26.0**
UK film production tax relief	338.4	64.7	414.9	71.3	469.0	74.0
Total public sector selective and automatic	**523.1**	**100.0**	**581.6**	**100.0**	**633.7**	**100.0**

Source: Named funding sources, Creative Cultural Associates analysis

Notes:

[1] Allocations to BFI, Creative Scotland, Northern Ireland Screen, Ffilm Cymru Wales and Heritage Lottery Fund awards to film projects.

[2] Includes Film4's production investment and Channel 4 investment in NFTS.

[3] Includes BBC Films' production investment and BBC investment in the NFTS and film production schemes.

[4] Includes ACE National Lottery investments (for example from Grants for the Arts) into moving image projects, plus National Portfolio Organisation investments attributable to film and the moving image, based upon ACE calculations.

[5] The figures are for calendar years 2015-2017 and cover film investments only; they do not include the awards to non-British sales agents and distributors handling UK film exports to the EU reported in Table 2. Data provided in Euros and converted to British pounds. Exchange rates: 2015 €1= £0.85; 2016 €1= £0.88; 2017 €1=£0.89.

[6] This comprises Higher Education establishment-derived support for film archives and the National Film and Television School. It does not include payments from educational funding councils to other film courses (film studies, etc.) in higher or further education.

[7] Investment by local authorities in regional film archives, Creative England, Screen South and Northern Film + Media.

[8] European Social Fund, European Regional Development Fund.

[9] Very small awards (under £10,000) from a range of public sector agencies, mainly made to national/regional screen agencies.

[10] Does not include transfers to and from reserves or earned/self-generated income.

Figures/percentages may not sum to totals/sub-totals due to rounding.

SPEND BY AGENCY

As in previous years, HMRC was the largest net spender on film in 2017/18 (£469 million for film tax relief), followed by the BFI (£100 million), Film4/Channel 4 (£25 million) and the NFTS (£15.2 million; this figure includes capital expenditure and income from student grants).

Table 2 Net film spend by agency, 2017/18[1]

	£ million	%
HMRC	469.0	67.6
BFI	100.0	14.4
Film4/Channel 4	25.0	3.6
NFTS	15.2	2.2
Northern Ireland Screen	14.5	2.1
Scottish agencies[2]	11.6	1.7
BBC Films/BBC[3]	11.0	1.6
EU MEDIA sub-programme[4]	9.7	1.4
ACE[5]	8.0	1.2
Into Film	6.3	0.9
Welsh agencies[6]	5.5	0.8
Film London	5.8	0.8
Creative England	4.1	0.6
Screen Yorkshire, Screen South and Northern Film + Media	2.2	0.3
Creative Skillset[7]	2.2	0.3
English regional film archives[8]	1.9	0.3
British Council	1.1	0.2
Heritage Lottery Fund	0.4	0.1
Total public agencies[9]	**693.6**	**100.0**

Source: Named funding sources, Creative Cultural Associates analysis

Notes:

[1] Net spend means spend after deducting grants and awards to other organisations in this table. Figures are presented net to avoid double counting. Spend includes earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves as well as income derived from public sector sources.

[2] Includes film expenditure on the part of Creative Scotland and the National Library of Scotland Moving Image Archive.

[3] Investment for the calendar year 2017.

[4] Includes £5.3 million granted in support of UK films exported to the EU through schemes providing grants to non-UK distributors and sales agents handling British titles. Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.89.

[5] Includes ACE National Lottery investments (for example from Grants for the Arts) into moving image projects, plus National Portfolio Organisation investments attributable to film and the moving image, based upon ACE calculations.

[6] Welsh agencies means Ffilm Cymru Wales and the Film Archive of Wales (part of the National Library of Wales) and direct investments by the Welsh Government.

[7] Creative Skillset was rebranded as ScreenSkills in 2018, following a merger with the Indie Training Fund.

[8] Includes East Anglian Film Archive, Media Archive for Central England (MACE), North East Film Archive, North West Film Archive, Screen Archive South East, South West Film and Television Archive and Yorkshire Film Archive.

[9] The spending tabulated above includes net transfers to and from reserves and spending financed by commercial income (e.g. from film rights) earned by agencies. For these reasons the total spending by agencies (£693.6 million) is higher than total public funding for film in the 2017/18 year (£633.7 million, Table 1).

Figures/percentages may not sum to totals due to rounding.

ACTIVITIES SUPPORTED BY PUBLIC SPENDING ON FILM

Table 3 describes the areas of activity supported by public spend on film in the UK between 2015/16 and 2017/18. Production has consistently benefited from the largest share of public investment, the majority of which derives from the automatic funding available through the film tax relief. In 2017/18, film production accounted for £548 million (79% of the total). In the same financial year, distribution and exhibition benefited from the second largest share of public spending at 10% (£70 million) while training and skills activity received 4% of total public spend (£26 million).

Public spending increased each financial year between 2015/16 and 2017/18 in the areas of production, distribution and exhibition, and export and inward investment promotion. Training and skills showed a similar trajectory with only a minor decrease in 2016/17. With the exception of administration and services to the public, spending declined in all other areas of activity, with film archives and heritage recording the steepest drop.

Table 3 Activities supported by public spend on film, 2015/16 - 2017/18 (ranked by 2017/18 spend)

	2015/16		2016/17		2017/18	
	£ million	%	£ million	%	£ million	%
Production[1]	424.2	76.1	489.8	77.2	548.1	79.0
Distribution and exhibition	42.2	7.6	55.2	8.7	69.7	10.0
Training and skills[2]	24.3	4.4	24.0	3.8	26.2	3.8
Export and inward investment promotion[3]	9.4	1.7	10.9	1.7	12.5	1.8
Administration and services to the public	8.1	1.5	11.6	1.8	10.7	1.5
Education, young people and lifelong learning	14.0	2.5	9.8	1.5	8.7	1.3
Film archives and heritage[4]	20.7	3.7	19.5	3.1	8.4	1.2
Development	8.3	1.5	8.9	1.4	6.1	0.9
Business support[5]	5.9	1.1	4.9	0.8	3.0	0.4
Total[6]	**557.1**	**100.0**	**634.7**	**100.0**	**693.6**	**100.0**

Source: Creative Cultural Associates, Bigger Picture Research

Notes:

[1] Non-tax break production spend in 2017/18 was £79.2 million.

[2] Skills Investment Fund, national/regional screen agency training investment.

[3] British Film Commission; British Council, locations services in the nations and regions.

[4] BFI National Film and Television Archive, National/regional screen archives, Heritage Lottery Fund investments.

[5] National/regional screen agency investment: primary beneficiaries are independent production companies.

[6] 2017/18 total expenditure (£693.6 million) was greater than total public funding (£633.7 million, Table 1) as expenditure was supplemented by earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves.

Data for 2016/17 updated since publication of the 2018 Statistical Yearbook.

Figures/percentages may not sum to totals due to rounding.

SPEND ACROSS THE UK NATIONS

Many sources of public investment for film, such as the production tax relief, are intended for the benefit of the industry throughout the UK. However, some sources of funding are particular to the individual UK nations (e.g. investment from Ffilm Cymru Wales, Creative Scotland and Northern Ireland Screen). Table 4 shows the level of investment dedicated to each of the UK nations in 2017/18. In cash terms, England received the greatest level of funding with £22 million. In per capita terms, however, the level of investment in Northern Ireland was the highest at £7.64 per person, almost three times the level in Scotland, which had the next highest spend per person at £2.15.

Table 4 Investment in film in the UK nations 2017/18 (ranked by total dedicated investment)

	Total dedicated investment £ million	Population (million)	£ per person
England[1]	22.0	55.3	0.40
Northern Ireland[2]	14.5	1.9	7.64
Scotland[3]	11.6	5.4	2.15
Wales[4]	5.4	3.1	1.77

Source: Creative Cultural Associates, ONS

Notes:

[1] Includes investment from Creative England, English regional screen agencies, English regional screen archives and Arts Council England.

[2] Includes investment from Northern Ireland Screen.

[3] Includes investment from Creative Scotland and the National Library of Scotland Moving Image Archive.

[4] Includes investment from Ffilm Cymru Wales, Wales Film Archive and Welsh Government direct expenditure.

Image: *Blinded by the Light* courtesy of eOne Films

CREATIVE EUROPE INVESTMENT IN THE UK

Creative Europe is the European Union's support programme for the cultural and audiovisual sectors. It was launched in January 2014 with a budget of €1.5 billion (approximately £1.3 billion) for the period 2014-2020, and follows on from the previous Culture and MEDIA programmes.

Creative Europe's MEDIA sub-programme supports European film and other audiovisual industries by funding the development, promotion and distribution of European works. In 2017, the MEDIA sub-programme invested £4.4 million in UK-based film activity; two thirds of this (£2.9 million) supported film distribution schemes (Table 5).

Table 5 Creative Europe MEDIA sub-programme investment in film in the UK, 2017

Activity area	MEDIA scheme(s)	£ million	%
Distribution	Selective, automatic, sales agents and online	2.9	65.9
Development	Single project and slate	0.5	11.4
Training and skills	Training	0.3	6.8
Business support	Markets	0.3	6.8
Exhibition	Film festivals, Europa Cinemas	0.3	6.8
Education	Film education	0.1	2.3
Total		**4.4**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis

Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.89.

In addition to this, £5.3 million was invested in support of UK films exported to other countries in the EU through schemes providing grants to non-UK distributors and sales agents handling British titles.

The MEDIA sub-programme also supports UK television and new media. UK video games development benefited from £0.7 million in 2017, while £0.5 million was invested in television production (Table 6).

Table 6 Creative Europe MEDIA sub-programme investment in television and new media in the UK, 2017

Activity area	MEDIA scheme(s)	£ million	%
Development: new media	Video games	0.7	60.0
TV production	TV programming	0.5	40.0
Total		**1.2**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis

Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.89.

BFI LOTTERY AWARDS 2018

Table 7 shows the Lottery awards made by the BFI in 2018. There were 302 awards in total (down from 351 in 2017) with a combined value of £31 million.

Table 7 BFI Lottery awards, 2018 (ranked by total value)

Source	Number of awards	Total value (£ million)
Film Fund - Production	39	14.3
Film Fund - Audiences	74	7.2
Film Fund - Heritage	1	4.1
Film Fund - Development	104	2.2
Film Fund - International	40	1.9
Film Fund - Talent development	44	1.2
Total	**302**	**30.9**

Source: BFI

Note: BFI awards data are for calendar year 2018.

A total of 18 films were awarded project funding of £250,000 or over from the BFI in 2018 (Table 8). Two films received funding of over £1 million. (The value of awards listed in the table includes all funding for individual projects in 2018, and may comprise separate awards for development, pre-production and production.)

Table 8 Large awards (£250,000+) for film made by the BFI, 2018

Project	Amount of award (£)
Molly	1,140,000
Misbehaviour	1,065,080
The Show	994,500
Normal People	935,000
Girl Untitled	931,250
Summerland	897,300
Monsoon	835,000
The Last Tree	801,639
Saint Maud	797,820
Eternal Beauty	782,500
Born To Run	750,747
Wildfire	685,000
Lynn and Lucy	610,000
Rialto	580,455
Chaplin	575,000
Limbo	535,000
Little Joe	500,000
The Reason I Jump	265,000

Source: BFI

Note: BFI awards data are for calendar year 2018.

LEADING PUBLIC INVESTORS IN BRITISH FILM PRODUCTION, 2016-2018

Table 9 shows the leading providers of public agency and public service broadcaster investment in British films for the calendar years 2016-2018. The public investor involved with the greatest number of films was the BFI with 85 projects (combined budget £265 million) followed by BBC Films/BBC (68 projects, combined budget £186 million). These budget figures are for the total budget of the films, including the share of budget provided by other public investors, private investors and pre-sales.

Table 9 Leading public investors in British film production, 2016-2018

Public funder	Number	Estimated budget (£ million)	Selected titles
BFI	85	265	Dirty God; The Last Tree; Blinded by the Light
BBC Films/BBC	68	186	Horrible Histories: The Movie - Rotten Romans; Sorry We Missed You; They Shall Not Grow Old
European agencies	45	141	Mary Shelley; The White Crow; Yuli
Film4/Channel 4	38	246	Diego Maradona; The Personal History of David Copperfield; Peterloo
Creative Scotland	36	76	Calibre; Last Breath; Tell It to the Bees
English regional screen agencies	21	35	Mari; Official Secrets; Yardie
Creative England	20	20	Days of the Bagnold Summer; The Hippies: Punk Rocked My Cradle; The Runaways
Welsh agencies/S4C/Welsh Government	19	55	Journey's End; Ray & Liz; Rockfield: The Studio on the Farm
Screen Ireland/Broadcasting Authority of Ireland	19	46	The Favourite; Vita & Virginia; Zoo
Northern Ireland Screen	14	39	Bad Day for the Cut; The Dig; Wildfire
Creative Europe	5	20	The Keeper; Marionette; Sea Fever

Source: BFI production tracking

Notes:

In some cases more than one public agency contributed funding to the same film, so there is double counting of budgets and hence no total budget row.

Examples of 'European agencies' include Le Centre national du cinéma et de l'image animée, Deutscher Filmförderfonds and Film Fund Luxembourg.

Screen Ireland was formerly known as the Irish Film Board.

FILM EDUCATION AND INDUSTRY EMPLOYMENT

Image: *Colette* courtesy of Lionsgate Films

Facts in focus

LEARNING ABOUT AND THROUGH FILM

In 2018/19, over **280,000** children and young people across the UK participated in the film club initiative supported by educational charity **Into Film**

Over **890** talented 16-19 year olds gained filmmaking experience through the **BFI** Academy programme

SECONDARY EDUCATION

In 2018 / 2019:

- **40,200** students were entered for GCSE media/film/TV studies and moving image arts, down **12%** from 2017/18
- **1,900** students were entered for Scottish Intermediate media studies, down **6%** from 2017/18
- **22,300** students were entered for GCE A Level media/film/TV studies and moving image arts, down **13%** from 2017/18
- **1,000** students were entered for Scottish Higher media studies, down **6%** from 2017/18

HIGHER EDUCATION

Entries for higher education film and media related courses

2016/17
22,700
entries

2017/18
23,600
entries

FILM INDUSTRY WORKFORCE

In 2018, around **91,000** people worked in the UK film industry

69,000 in film and video production

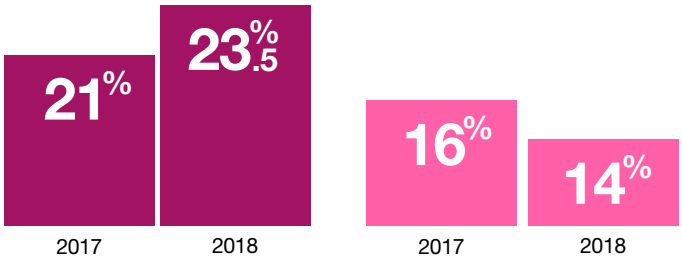
18,000 in film exhibition

4,000 in film and video distribution

SELF-EMPLOYMENT IN THE PRODUCTION SECTOR

In 2018, **45%** of those engaged in film and video production were self-employed compared with **15%** of the total UK workforce

GENDER PROFILE OF WRITERS AND DIRECTORS OF UK FILMS



Female writers of UK films released in the UK and Republic or Ireland

Female directors of UK films released in the UK and Republic of Ireland

WORKPLACE LOCATION

In 2018,
61%
of the UK film and video production workforce was based in **London and the South East**

WORKPLACE SCALE

51% of film and video production sector employees are based in workplaces with 10 people or less

94% of film exhibition sector employees are based in workplaces with 11 people or more

Film education and industry employment

LEARNING ABOUT AND THROUGH FILM

Film education takes place in both formal and informal settings, from schools and colleges to voluntary interest groups like youth clubs and film societies. Film is a rich and versatile medium for exploring subjects in the classroom and elsewhere, as well as a worthwhile and rewarding object of study in its own right.

The BFI continues to work with a range of partners in the private, cultural and education sectors to help forge an overarching strategy for film education in the UK. The plan is rooted in the belief that in the new digital landscape, the moving image should be acknowledged as having the same educational value as the printed text, and that film should be integrated into all forms of education, learning, training, cultural appreciation and understanding. The plan also calls for the creation of clear progression paths, both for future audiences as they develop a passion for film, and for the talented young people who will go on to develop careers in the film industry.

FILM EDUCATION IN FORMAL EDUCATION SETTINGS

In practice, film education activity has traditionally involved watching and listening to a range of film texts, discussing and analysing them; generating discursive and written work storyboards and scripts; making films; and re-purposing archive material. Outside of dedicated film and media studies courses, film is also used in other parts of the curriculum, such as science, English or modern languages.

The creation of the charity Into Film in 2013 represented one of the largest ever investments in film education for the formal sector in the UK. Supported by the BFI and a range of other funders, Into Film's core role is to make film an integrated part of education for 5-19 year olds. This is done primarily through providing film-based materials to support the current curriculum and providing resources for watching, making and learning about film within its network of schools' film clubs. (Film clubs supported by Into Film also operate in non-school settings such as youth clubs, cinemas and libraries.)

Image: *Nativity Rocks!* courtesy of eOne Films

According to Into Film, in 2018/19 there were over 13,000 active film clubs in the UK. Over 280,000 children and young people participated in some form of film club activity and over 4,100 teaching professionals and youth leaders received training to work with film across the curriculum (including film studies). It is estimated that around 143,000 sets of educational resources were downloaded in the year. Resources ranged from curriculum-linked worksheets, lesson plans and presentations to film discussion guides, supported by a catalogue of selected films primarily available for use within film clubs.

Table 1 National/regional distribution of registered film clubs[1], 2018/19 (ranked by number of clubs registered)

Nation/region	Number of film clubs	% of film clubs
England	10,028	77.0
London	1,786	13.7
South East	1,529	11.7
South West	1,155	8.9
North West	1,148	8.8
West Midlands	1,121	8.6
East of England	991	7.6
East Midlands	906	7.0
Yorkshire and The Humber	898	6.9
North East	494	3.8
Scotland	1,246	9.6
Northern Ireland	894	6.9
Wales	862	6.6
Total	**13,030**	**100.0**

Source: Into Film

Notes:

[1] In previous editions of the Statistical Yearbook we have presented data for both active and inactive film clubs. In 2018/19, Into Film developed and implemented a new methodology to more robustly identify actively engaged film clubs. As the data presented here include active film clubs only, figures are not directly comparable to those published previously.

Percentages may not sum to 100 due to rounding.

One of Into Film's flagship events is the annual Into Film Festival, a UK-wide programme of free film screenings and related activities for children and young people. The festival aims to build on the success of National Schools Film Week previously run by the charity Film Education which closed in April 2013. Table 2 shows the numbers of children and young people who have participated in the Into Film Festival since 2014. Over 371,000 children and young people (and almost 68,000 education professionals) attended the festival in 2018, a rise of 17% compared with 2014.

Table 2 Attendances at the Into Film Festival, 2014-2018

	2014	2015	2016	2017	2018
Into Film Festival	317,189	353,416	407,058	411,466	371,164

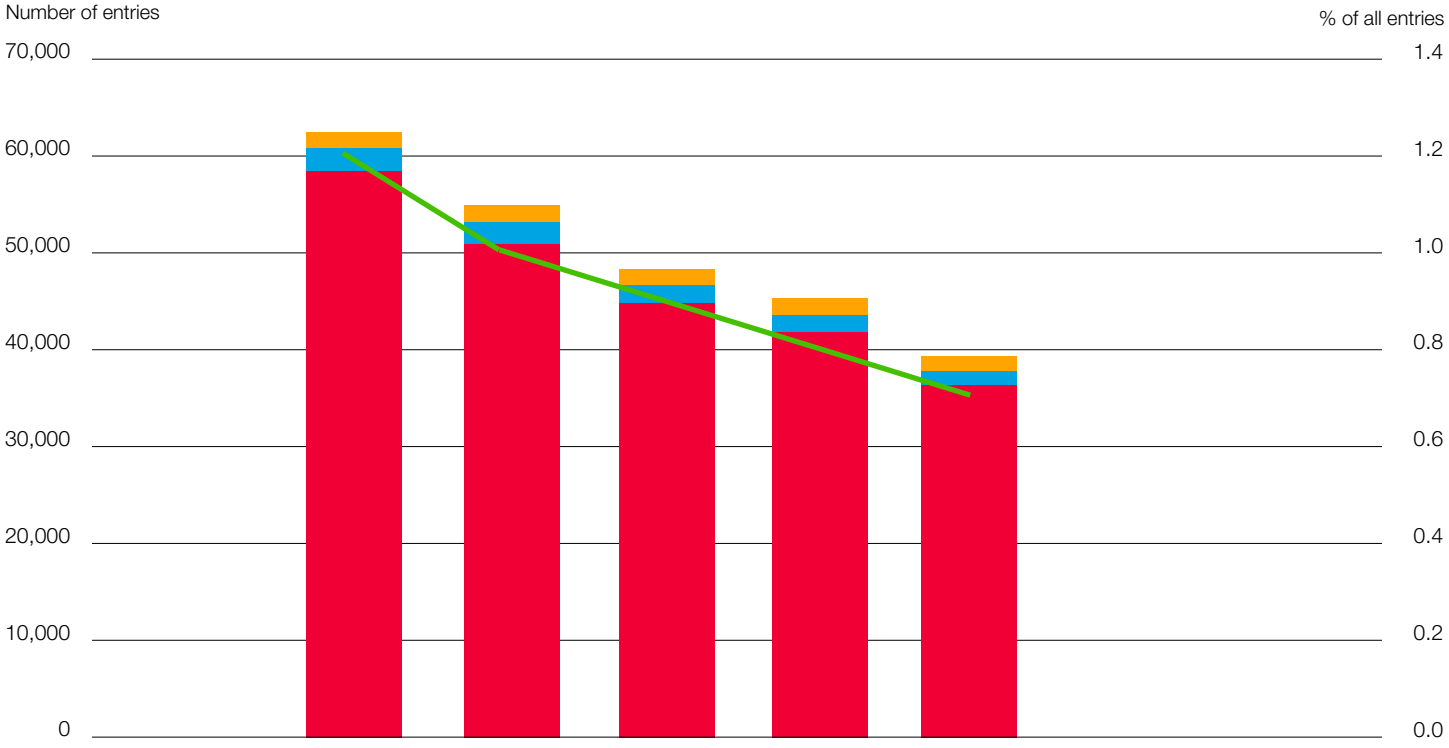
Source: Into Film

Note: Figures are for attendances by children and young people only; they do not include education professionals or other adult attendees.

Figures 1-6 show the number of students entered for examinations in film and media specific subjects taught in schools and colleges across the UK between 2014/15 and 2018/19.

In line with an overall decline in the numbers of students being entered for creative arts subjects at GCSE level in recent years, the take-up of screen and media related subjects has continued to fall. As Figure 1 shows, between 2014/15 and 2018/19 there was a 37% decrease in the total number of students entering GCSE Media, Film or TV Studies in England, Wales and Northern Ireland, while entries for all equivalent qualifications increased by 5%. The total number of entries for GCSE Media, Film or TV Studies in 2018/19 was just under 39,400, which equates to 0.7% of all GCSE entries, the lowest share of the five-year period.

Figure 1 Entries for GCSE Media/Film/TV Studies in England, Wales and Northern Ireland, 2014/15-2018/19



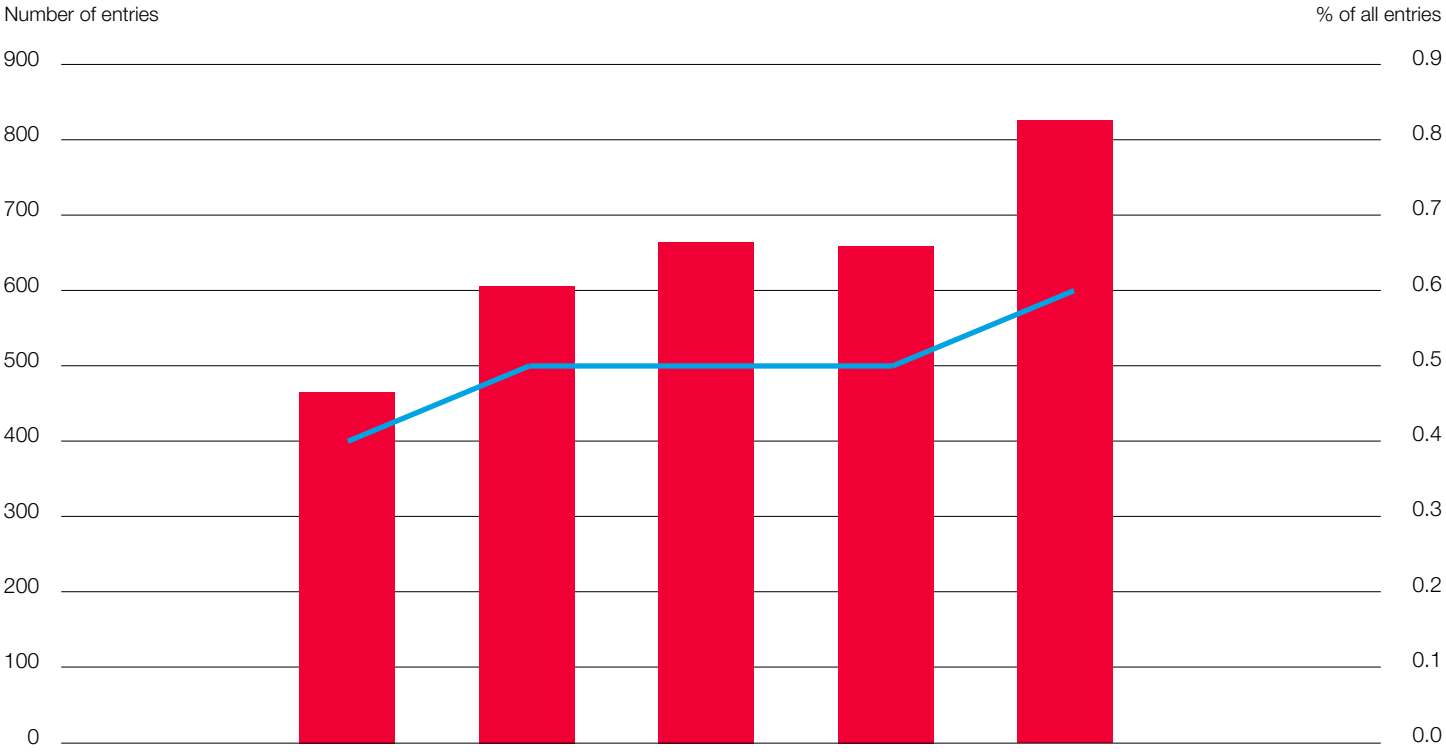
	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017-2019	% change 2014-2019
England	58,496	50,957	44,865	41,832	36,437	-12.9	-37.7
Wales	2,350	2,248	1,780	1,663	1,416	-14.9	-40.0
Northern Ireland	1,606	1,771	1,717	1,789	1,529	-14.5	-4.8
Total	**62,452**	**54,976**	**48,362**	**45,284**	**39,382**	**-13.0**	**-36.9**
All GCSE entries	5,277,604	5,240,796	5,443,072	5,470,076	5,547,447	1.4	5.1
Media/Film/TV Studies as % of all GCSE entries	1.2	1.0	0.9	0.8	0.7	-	-

Source: Joint Council for Qualifications (JCQ)

Note: Scotland is not included because of its separate examinations system.

In contrast with the previous chart, Figure 2 shows an overall upward trend in the annual number of entries for the GCSE in Moving Image Arts offered by Northern Ireland's Council for the Curriculum, Examinations and Assessment (CCEA) between 2014/15 and 2018/19. The year-on-year increase in 2018/19 was particularly notable, with entries up 25% on 2017/18. Entries for the qualification rose by 77% over the five-year period compared to a 10% rise in the number of entries for all GCSEs offered in Northern Ireland.

Figure 2 Entries for GCSE Moving Image Arts in Northern Ireland, 2014/15-2018/19



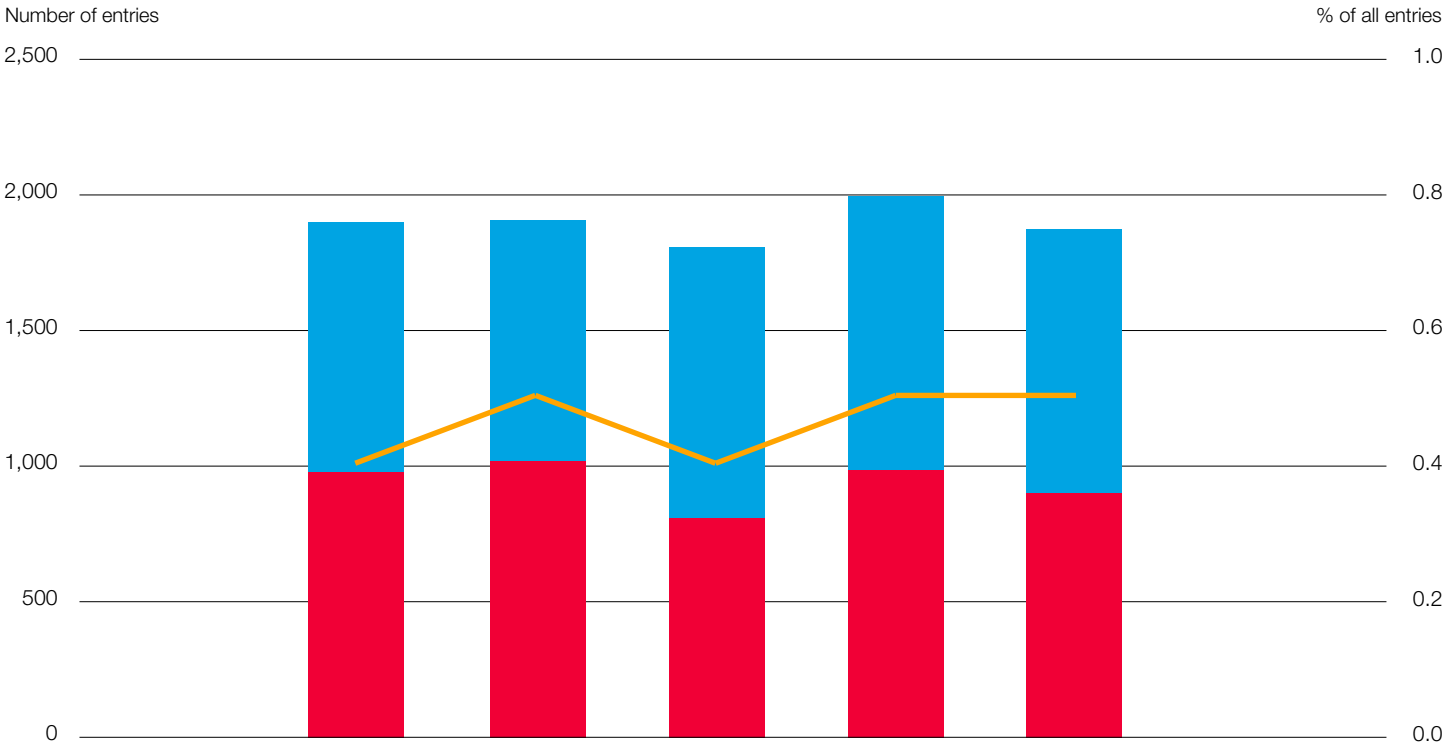
	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017-2019	% change 2014-2019
GCSE Moving Image Arts entries	467	607	666	660	827	25.3	77.0
All GCSE entries in Northern Ireland	128,382	126,964	137,486	146,451	140,734	-3.9	9.6
Moving Image Arts as % of all entries	0.4	0.5	0.5	0.5	0.6	-	-

Source: CCEA

Note: Data for 2015/16 include entries for a limited scheme in Scotland but percentages apply to Northern Ireland only.

In total, there were 1,874 entries for Scottish Intermediate Levels 1 and 2/National Levels 4 and 5 Media Studies in 2018/19, which represents 0.5% of all equivalent level entries (Figure 3). While the total number of Media Studies entries has fallen by 1% over the five-year period from 2014/15, entries for all equivalent qualifications have decreased by 9%.

Figure 3 Entries for Scottish Intermediate/National Level Media Studies, 2014/15-2018/19

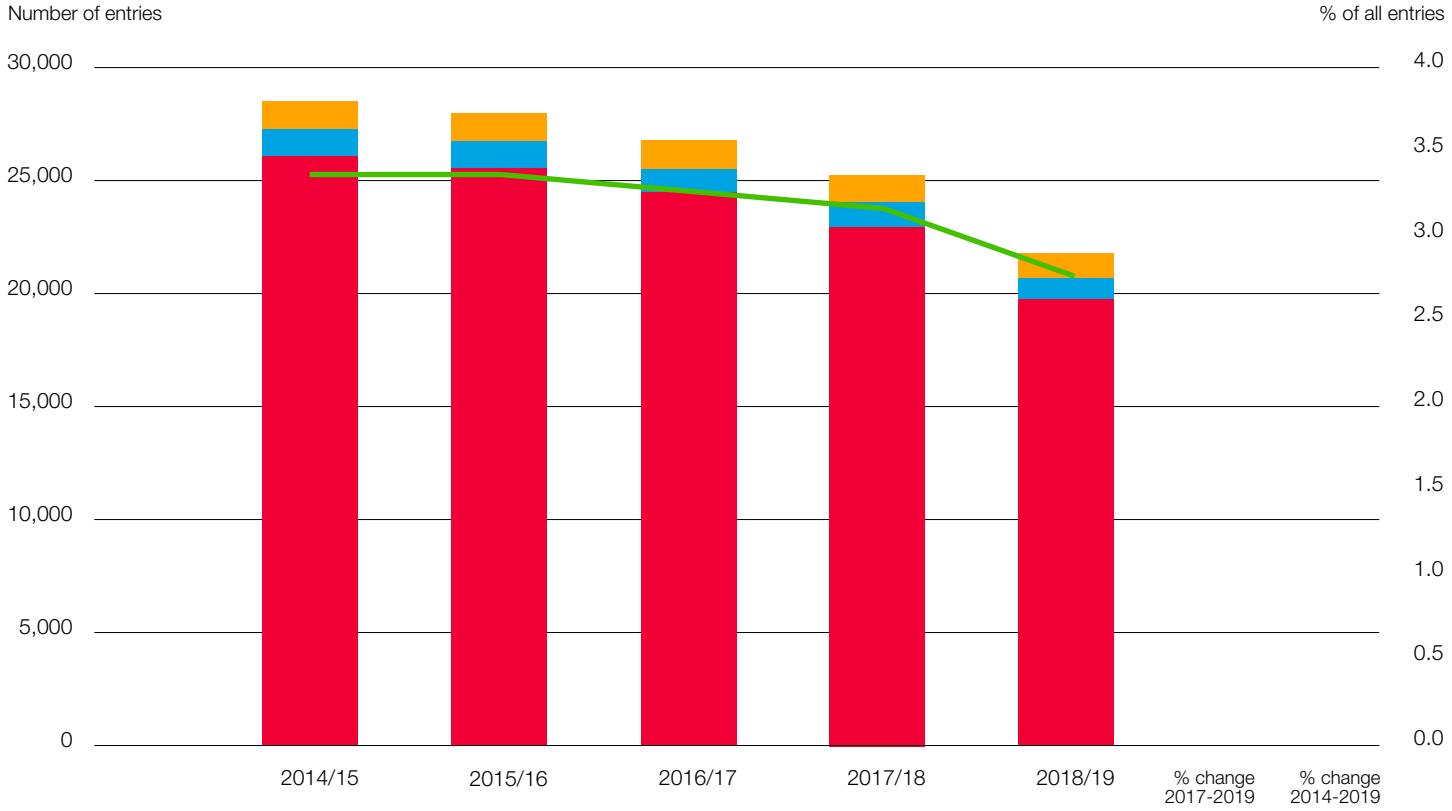


	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017-2019	% change 2014-2019
Intermediate Level 1/National Level 4 Media Studies entries	979	1,018	808	987	902	-8.6	-7.9
Intermediate Level 2/National Level 5 Media Studies entries	920	889	1,003	1,007	972	-3.5	5.7
Total	**1,899**	**1,907**	**1,811**	**1,994**	**1,874**	**-6.0**	**-1.3**
All Intermediate Level 1/ National Level 4 entries	132,429	122,961	116,032	106,033	104,866	-1.1	-20.8
All Intermediate Level 2/ National Level 5 entries	298,694	295,083	293,220	281,785	288,552	2.3	-3.5
Total all entries	431,123	418,044	409,252	387,818	393,418	1.4	-8.7
Media Studies as % of all entries	0.4	0.5	0.4	0.5	0.5	-	-

Source: Scottish Qualifications Authority (SQA)

The total number of students taking GCE A Level Media, Film or TV Studies in England, Wales and Northern Ireland decreased by 23.5% between 2014/15 and 2018/19, compared with a fall of 6% in entries for all equivalent qualifications (Figure 4). The total number of entries across the three nations in 2018/19 was just under 21,900, which equates to 2.7% of all GCE A Level entries, the lowest share of the five-year period.

Figure 4 Entries for GCE A Level Media/Film/TV Studies in England, Wales and Northern Ireland, 2014/15-2018/19



	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017-2019	% change 2014-2019
England	26,036	25,516	24,450	22,968	19,765	-13.9	-24.1
Wales	1,224	1,197	1,048	1,065	919	-13.7	-24.9
Northern Ireland	1,207	1,250	1,275	1,207	1,091	-9.6	-9.6
Total	**28,467**	**27,963**	**26,773**	**25,240**	**21,775**	**-13.7**	**-23.5**
All GCE A Level entries	850,749	836,705	828,355	811,776	801,002	-1.3	-5.8
Media/Film/TV Studies as % of all entries	3.3	3.3	3.2	3.1	2.7	-	-

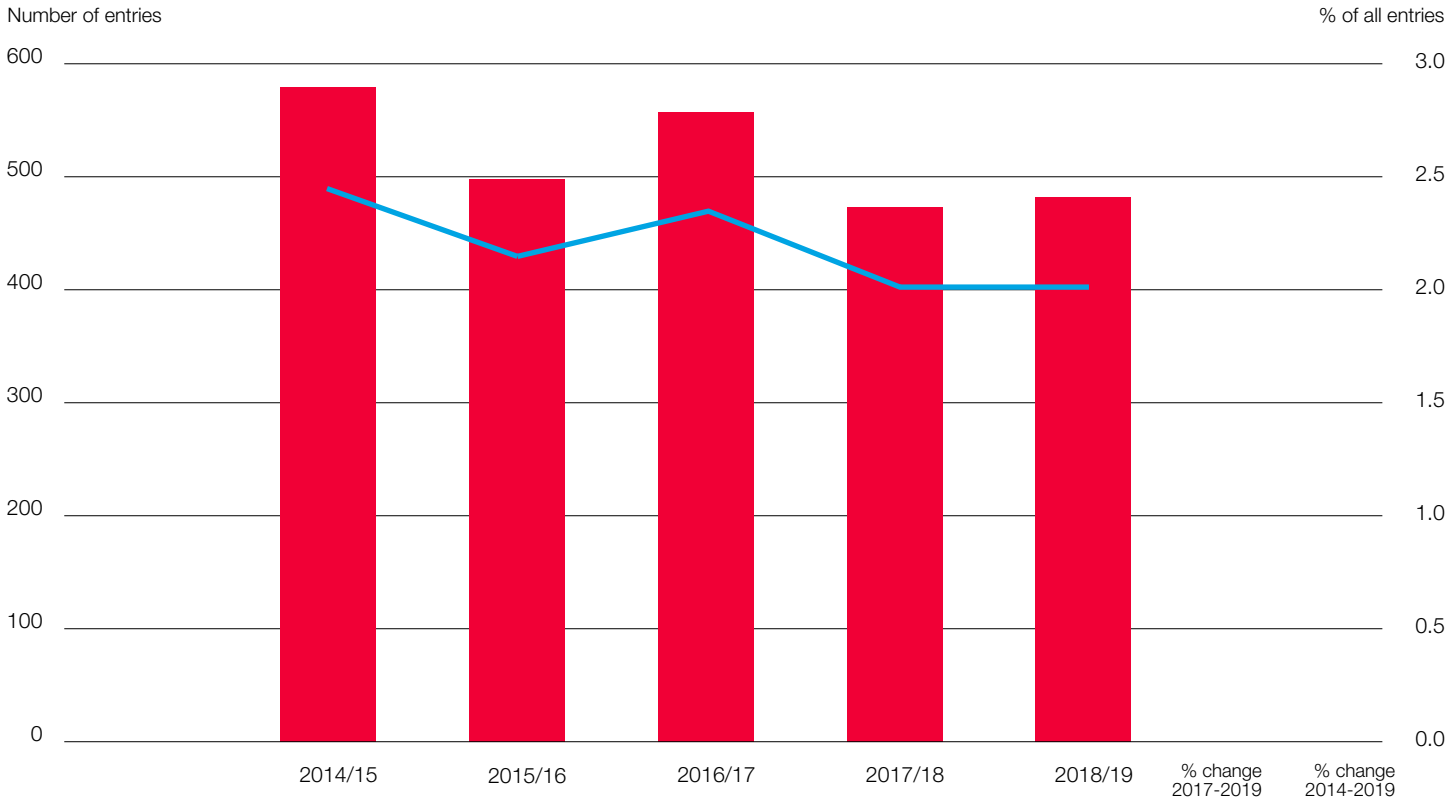
Source: Joint Council for Qualifications (JCQ)

Notes:

See notes to Figure 1.

As Figure 5 shows, the annual number of entries for the GCE A Level in Moving Image Arts in Northern Ireland has fluctuated since 2014/15 but the general trend was downward. Entries for the qualification in 2018/19 were down 17% compared with 2014/15. There was a 2% fall in the number of entries for all A Levels offered in Northern Ireland over the same period.

Figure 5 Entries for GCE A Level Moving Image Arts in Northern Ireland 2014/15-2018/19

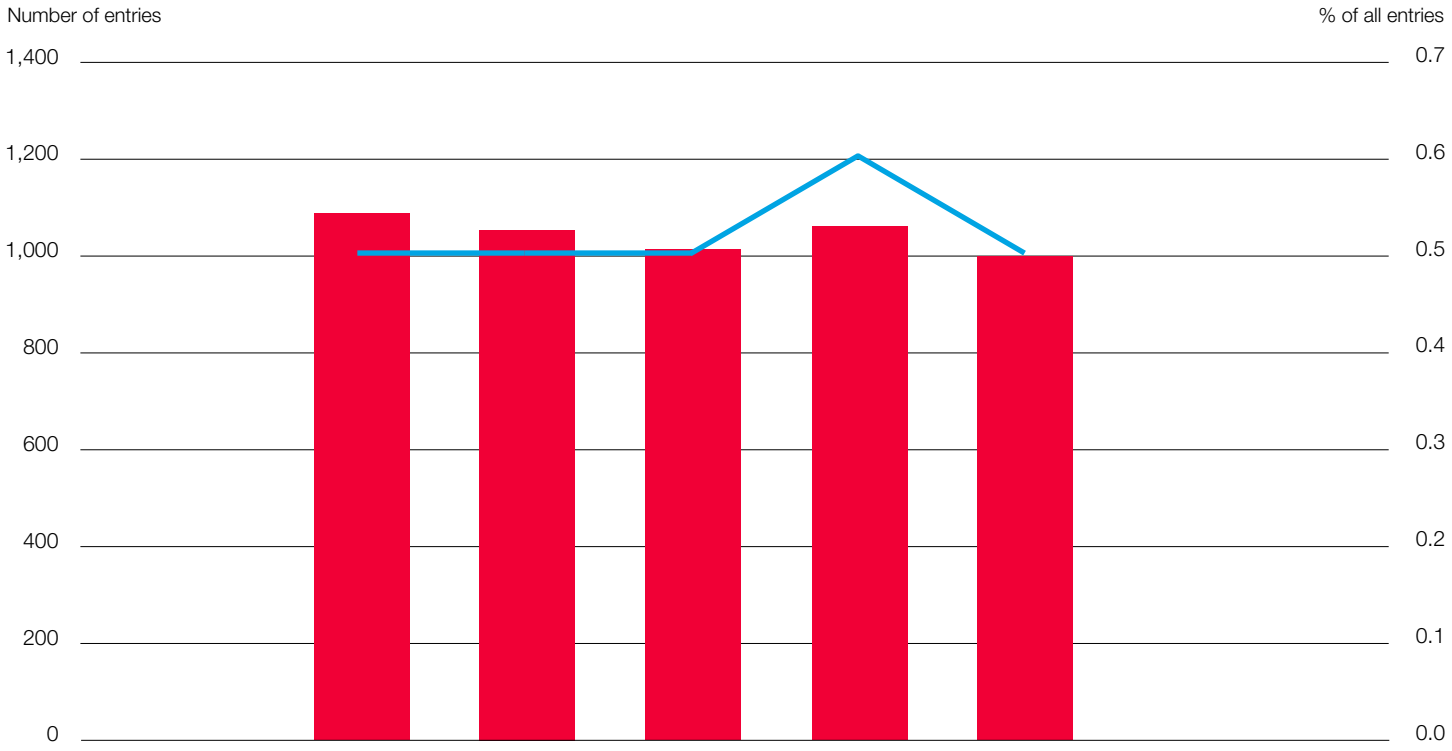


	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017-2019	% change 2014-2019
GCE A Level Moving Image Arts entries	579	498	557	473	482	1.9	-16.8
All GCE A Level entries in Northern Ireland	24,445	24,165	24,726	23,737	23,867	0.5	-2.4
Moving Image Arts as % of total entries	2.4	2.1	2.3	2.0	2.0	-	-

Source: CCEA

The number of entries for Scottish Higher Level 2/National Level 6 Media Studies has seen a slight downward trend overall since 2014/15 (Figure 6). However, as a percentage of all equivalent entries, Media Studies entries have remained fairly constant at between 0.5% and 0.6%.

Figure 6 Entries for Scottish Higher/National Level Media Studies, 2014/15-2018/19



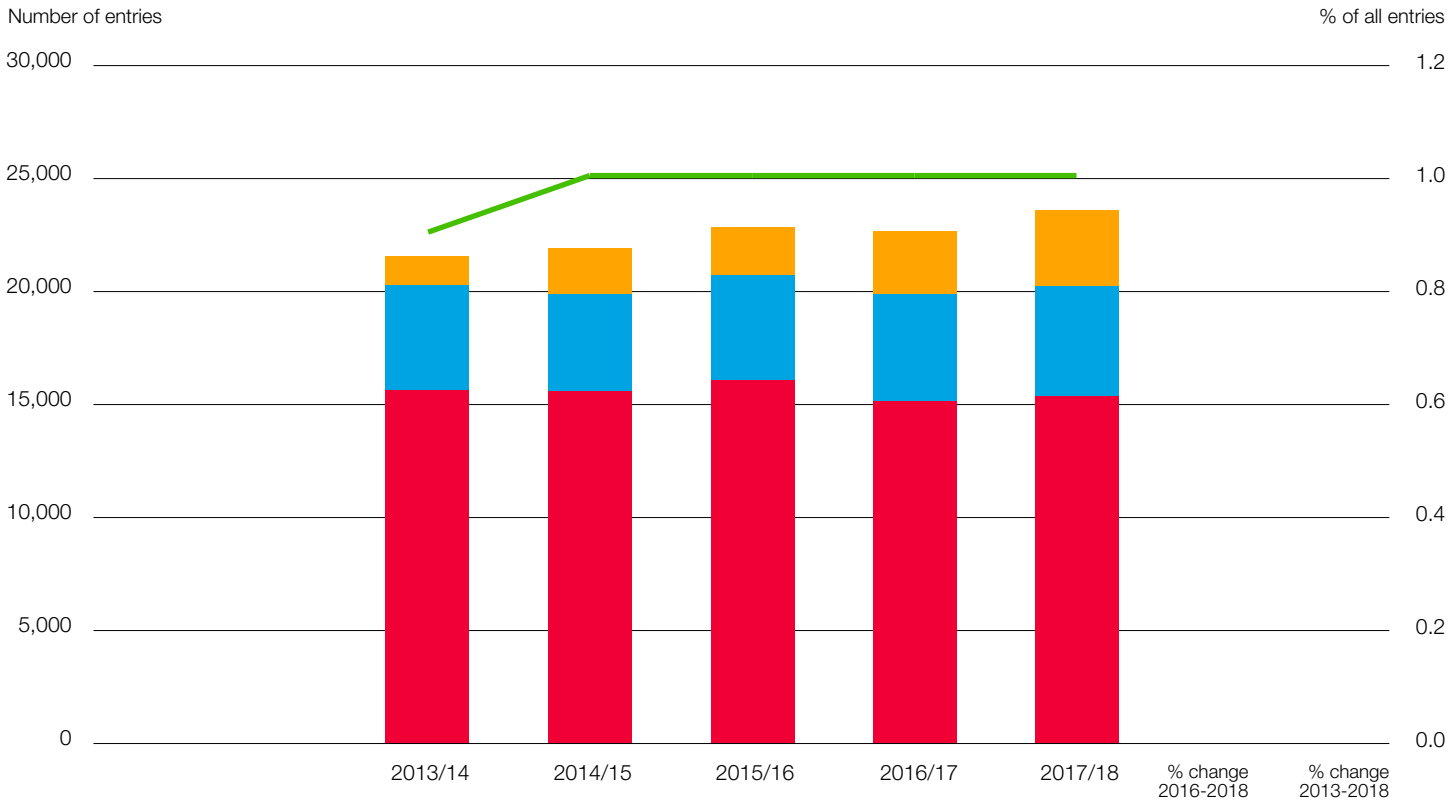
	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017-2019	% change 2014-2019
Higher Level 2/National Level 6 Media Studies entries	1,087	1,055	1,013	1,061	999	-5.8	-8.1
All Higher Level 2/National Level 6 entries	199,850	197,774	194,813	191,951	185,914	-3.1	-7.0
Media Studies entries as % of total entrants	0.5	0.5	0.5	0.6	0.5	-	-

Source: Scottish Qualifications Authority (SQA)

Study of the moving image and allied creative industries at a higher education level shows a different trajectory than the majority of the previous qualifications. As Table 7 shows, there was an overall upward curve in the number of entries between 2013/14 and 2017/18 (the latest year for which data are available). Just over 23,500 students were enrolled on such courses in 2017/18, the highest figure of the five-year period.

While the number of entries for both Media Studies and Film Studies courses has fluctuated between 2013/14 and 2017/18 the number of students undertaking Film Production courses increased each year over the period. There were 3,335 entries for Film Production courses in 2017/18, a rise of 156% compared with 2013/14.

Figure 7 Higher education entries in film and media, 2013/14-2017/18



	2013/14	2014/15	2015/16	2016/17	2017/18	% change 2016-2018	% change 2013-2018
Media studies	15,640	15,550	16,035	15,130	15,340	1.4	-1.9
Film studies	4,640	4,335	4,680	4,725	4,890	3.5	5.4
Film production	1,305	2,035	2,090	2,810	3,335	18.7	155.6
Total	**21,585**	**21,920**	**22,805**	**22,665**	**23,565**	**4.0**	**9.2**
All higher education entries	2,299,355	2,266,075	2,280,830	2,317,880	2,343,095	1.1	1.9
Film and media as % of all entries	0.9	1.0	1.0	1.0	1.0	-	-

Source: HESA

Notes:

Data have been rounded to the nearest multiple of 5.

Includes first degree, post-graduate and other degrees.

Media studies related courses include other media, film, television, radio, electronic and print-based media related courses.

Higher education data is only currently available up to 2017/18.

Many of the film and media related further and higher education courses are accredited (via the 'Tick' quality mark) by ScreenSkills (formerly Creative Skillset), the UK-wide strategic skills body for the screen-based creative industries. The ScreenSkills Tick is an assurance that courses provide the most up-to-date and relevant industry training and education. Currently 176 accredited courses are offered across the UK, including 57 film-related courses or programmes in areas such as directing, screenwriting, post-production, sound design and cinematography.

FILM EDUCATION AS A PROGRESSION ROUTE

Learning about film can be enhanced by practical involvement in filmmaking. In addition to the development of critical, creative and cultural skills, gaining filmmaking experience, particularly at an early age, can be a key stepping stone to the development of a career in the film industry.

In 2012, the BFI launched the Film Academy programme – supported now by the Department for Education in England, the National Lottery, Creative Scotland and Northern Ireland Screen – which was designed to help 16-19 year olds develop the necessary skills to enter the film industry. Since its launch, the Academy has enabled talented young people from a range of backgrounds to enjoy out-of-school and residential filmmaking experience, delivered through partner organisations across the nations and regions. In 2018/19 the Academy worked with 39 delivery partners reaching 892 young people from across the UK (Table 3). Of these students, 258 attended residential courses over the year (up from 193 in 2017/18).

Following a successful pilot in 2017, the BFI continued its support of the Film Academy Future Skills trainee programme which aims to provide career opportunities in film to under-represented young people. The 2018 scheme was run in partnership with Star Wars producer LucasFilm, and enabled 30 young people, the majority of whom were Academy graduates, to work as paid trainees in a variety of craft and technical roles on the production of *Star Wars: The Rise of Skywalker*.

Across all Academy programme activity in 2018/19, 53% of the participants were female, 31% were from black and minority ethnic backgrounds, 16% received free school meals, and 11% were disabled.

Table 3 BFI Film Academy participants, 2014/15-2018/19 (ranked by 2018/19 enrolment)

Nation/region	2014/15	2015/16	2016/17	2017/18	2018/19
England	582	679	715	700	694
London	148	146	150	146	162
South West	71	97	110	101	98
East of England	62	71	71	83	75
South East	73	88	109	81	80
Yorkshire and The Humber	37	78	82	73	75
North West	57	52	54	69	56
West Midlands	52	60	55	60	60
North East	44	47	44	46	48
East Midlands	38	40	40	41	40
Northern Ireland	85	80	80	84	82
Scotland	72	74	86	79	60
Wales	44	32	46	30	56
Total	**783**	**865**	**927**	**893**	**892**

Source: BFI

OTHER FILM EDUCATION ACTIVITY

In addition to the activity described above, there are many other organisations involved in the delivery of film education in the UK at both a national and regional level including independent cinemas, regional film archives, training providers and community-based groups. As well as providing courses and learning opportunities for young and adult learners, several organisations provide continuing professional development for teachers and training professionals.

Provision in 2018/19 included: Slough-based charity Resource Youth Film's programme of film training projects for children and young people aged 11-25 living in Berkshire, Buckinghamshire, Surrey and surrounding regions, which offered courses and workshops in camera, sound, lighting, directing and script development; the Nerve Centre's Digital Film Production scheme, one of a range of free courses for 16+ learners in Northern Ireland that aim to equip students for careers in the creative industries through hands-on training and placements in a variety of production departments; a pilot of the Isle of Skye-based Young Films Foundation talent development initiative, a residency programme comprising script workshops, seminars, practical directing and editing workshops, mentoring and industry networking, aimed at emerging writers, directors and producers based in Scotland; and the Ffilm Cymru-backed community film project Cynefin - Our Welcome, which saw the arts and community centre The Welfare - Ystradgynlais and local residents produce two animated films exploring the town's history of providing sanctuary to people fleeing conflict.

The BFI continues to run programmes for learners of all ages at BFI Southbank and as part of its festival outreach. Film education for children and young people is provided through events, study days and INSETs for primary and secondary school pupils and further education students, while families can learn about film together through creative workshops and activity days. For adult learners (including higher education students), the BFI runs an annual series of one-off and sustained learning experiences including library talks, courses, introduced screenings and discussion events.

In 2018/19, there were almost 47,000 admissions to education events run by BFI Southbank and BFI festivals, a slight fall from the 47,100 admissions seen in 2017/18, but up 22% on 2009/10 (Table 4). The number of visits to the BFI Reuben Library also decreased from 77,600 in 2017/18 to 72,500 in 2018/19. (Visits to the Library increased substantially between 2011/12 and 2012/13 following its relocation from the BFI head office to BFI Southbank.)

Table 4 BFI education attendances, 2009/10-2017/18

	BFI Southbank and festivals education event admissions	BFI Reuben Library visits
2009/10	38,569	10,969
2010/11	43,532	10,983
2011/12	42,000	11,900
2012/13	43,363	62,000
2013/14	44,641	69,592
2014/15	48,365	72,502
2015/16	46,669	73,146
2016/17	48,108	80,234
2017/18	47,105	77,555
2018/19	46,972	72,516
% change 2017/18-2018/19	-0.3	-6.4
% change 2009/10-2018/19	21.8	561.1

Source: BFI

EMPLOYMENT IN THE FILM INDUSTRY

The film industry employs substantial numbers of highly skilled workers. While employment levels are somewhat volatile, reflecting the variable level of demand for the sector's services, employment has more than doubled over the past decade.

According to the Annual Population Survey (APS) conducted by the Office for National Statistics (ONS), in 2018 around 91,000 people worked in film and video production, film and video distribution and film exhibition (Table 5). The figures include full- and part-time workers.

Table 5 Film industry workforce, 2018

Sector	Number in employment
Film and video production	69,000
Film and video distribution	4,000
Film exhibition	18,000
Total	**91,000**

Source: Office for National Statistics, Annual Population Survey

Notes:

Numbers in employment are taken from the Annual Population Survey for the period January-December 2018.

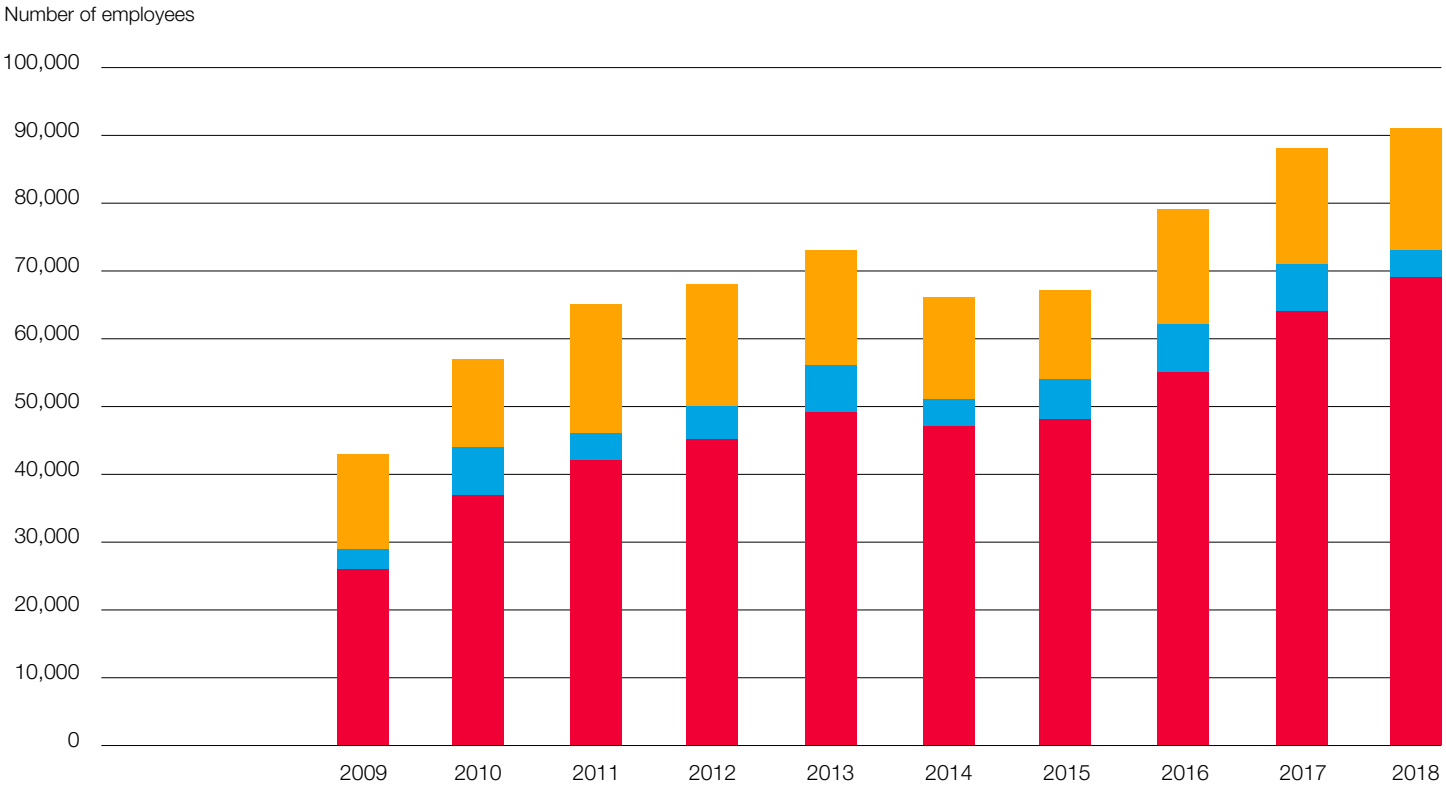
Figures are shown to the nearest 1,000.

People in employment include individuals aged 16 or over who undertook paid work (as an employee or self-employed), those who had a job that they were temporarily away from, those on government-supported training and employment programmes, and those doing unpaid family work.

As Figure 8 shows, growth in the size of the film workforce over the 10-year period 2009-2018 was driven primarily by increases in the number of employees in film and video production. (There is a large variety of job roles within production in areas ranging from art department, camera and construction to lighting, locations and music.) The film and video production workforce increased from 26,000 in 2009 to 69,000 in 2018. Employment levels in the industry's other main sectors have been more stable: the number of workers in film and video distribution has ranged from 3,000-7,000 over the period, while employee numbers in film exhibition have ranged from 13,000-19,000.

Image: *Stan & Ollie* courtesy of eOne Films

Figure 8 Size of the film workforce, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Film and video production	26,000	37,000	42,000	45,000	49,000	47,000	48,000	55,000	64,000	69,000
Film and video distribution	3,000	7,000	4,000	5,000	7,000	4,000	6,000	7,000	7,000	4,000
Film exhibition	14,000	13,000	19,000	18,000	17,000	15,000	13,000	17,000	17,000	18,000

Source: Office for National Statistics, Annual Population Survey

The production sector has traditionally employed a high proportion of freelance workers. In 2018, 45% of those engaged in film and video production, a total of more than 31,000 people, were self-employed (Table 6). In comparison, only 15% of the total UK workforce was self-employed in 2018.

Table 6 Film and video production workforce, 2009-2018

Year	Total in employment	Self-employed	Self-employed as % of total
2009	26,000	15,000	60
2010	37,000	20,000	54
2011	42,000	24,000	57
2012	45,000	22,000	49
2013	49,000	24,000	49
2014	47,000	28,000	61
2015	48,000	24,000	51
2016	55,000	27,000	49
2017	64,000	32,000	50
2018	69,000	31,000	45

Source: Office for National Statistics, Annual Population Survey

Notes:

Numbers in employment are shown to the nearest 1,000 but percentages are based on unrounded numbers.

See note to Figure 8.

THE GENDER OF WRITERS AND DIRECTORS OF UK FILMS

We have been tracking the gender of writers and directors of UK films since 2005. The under-representation of women in these roles has been the subject of a number of subsequent reports including Succès de plume? Female screenwriters and directors of UK films, 2010-2012 (BFI, 2013), Where are the women directors? Report on gender equality for directors in the European film industry 2006-2013 (European Women's Audio Visual Network, 2016), and Cut out of the picture: A study of gender inequality amongst film directors in the UK film industry (Directors UK, 2016). The BFI Filmography, a database drawing on credits from over 10,000 UK films, has provided further perspective on the gender imbalance across the entire UK film workforce. Its published data on writers and directors involved with UK films, which currently extends from 1911 to 2017, found that since the 1990s there has only been a slight change in the gender ratios associated with these roles: the proportion of female writers has averaged around 14% since the 1990s, while the proportion of female directors increased from 10.3% in the 1990s to 13.5% in the period 2010-2017.

In 2018, of the 276 identified writers of UK films released during the year, 65 (24%) were women, the highest number (and proportion) of female writers since our records began (Table 7). Female writers associated with UK films released in the year include: Emily Carmichael and Kira Snyder (*Pacific Rim: Uprising*), Helen Edmundson (*Mary Magdalene*), Gillian Flynn (*Widows*), Philippa Goslett (*How to Talk to Girls at Parties* and *Mary Magdalene*), Tamara Jenkins and Evgenia Peretz (*Juliet*, *Naked*), Rebecca Lenkiewicz (*Colette*), Meg Leonard (*Finding Your Feet*), Geneva Robertson-Dworet (*Tomb Raider*) and Allison Schroeder (*Christopher Robin*).

Table 7 Gender of writers of UK films released in the UK, 2009-2018

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Number of UK films released in the UK	114	119	127	162	139	154	209	176	159	197
Number of writers associated with these films	140	143	159	187	155	211	285	233	209	276
Number of male writers	117	126	129	162	133	181	244	195	165	211
Number of female writers	23	17	30	25	22	30	41	38	44	65
% male	83.6	88.1	81.1	86.6	85.8	85.8	85.6	83.7	78.9	76.4
% female	16.4	11.9	18.9	13.4	14.2	14.2	14.4	16.3	21.1	23.5

Source: BFI

Table 8 shows directors by gender for UK films released in the UK between 2009 and 2018. The number of female directors in 2018 (29) was the highest of the period, and as a proportion of the total (14%) was the fifth highest. Some of the female directors associated with UK films released in the year are: Haifaa Al-Mansour (Mary Shelley), Clio Barnard (*Dark River*), Isabel Coixet (*The Bookshop*), Debbie Issitt (*Nativity Rocks!*), Mandie Fletcher (*Patrick*), Deborah Haywood (*Pin Cushion*), Lynne Ramsay (*You Were Never Really Here*) and Mitra Tabrizian (*Gholam*). All of these directors also wrote or co-wrote the scripts for their films. In total, 24 of the 29 female directors of UK films released in 2018 were writers or co-writers of their films.

Table 8 Gender of directors of UK films released in the UK, 2009-2018

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Number of UK films released in the UK	114	119	127	162	139	154	209	176	159	197
Number of directors associated with these films	123	133	140	179	149	165	224	188	178	212
Number of male directors	102	116	119	165	128	148	203	163	150	183
Number of female directors	21	17	21	14	21	17	21	25	28	29
% male	82.9	87.2	85	92.2	85.9	89.7	90.6	86.7	84.3	86.3
% female	17.1	12.8	15.0	7.8	14.1	10.3	9.4	13.3	15.7	13.6

Source: BFI

THE WORKPLACE LOCATION

In 2018, 61% of the UK film and video production workforce was based in London and the South East, compared with 29% of the workforce as a whole (Table 9).

Table 9 London and South East employment as percentage of total, 2018

Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	32,000,000	9,400,000	29.4
Film and video production	69,000	42,000	60.9

Source: Office for National Statistics, Annual Population Survey

Notes:

The South East region wraps around London so includes the major studios to the west of the city.

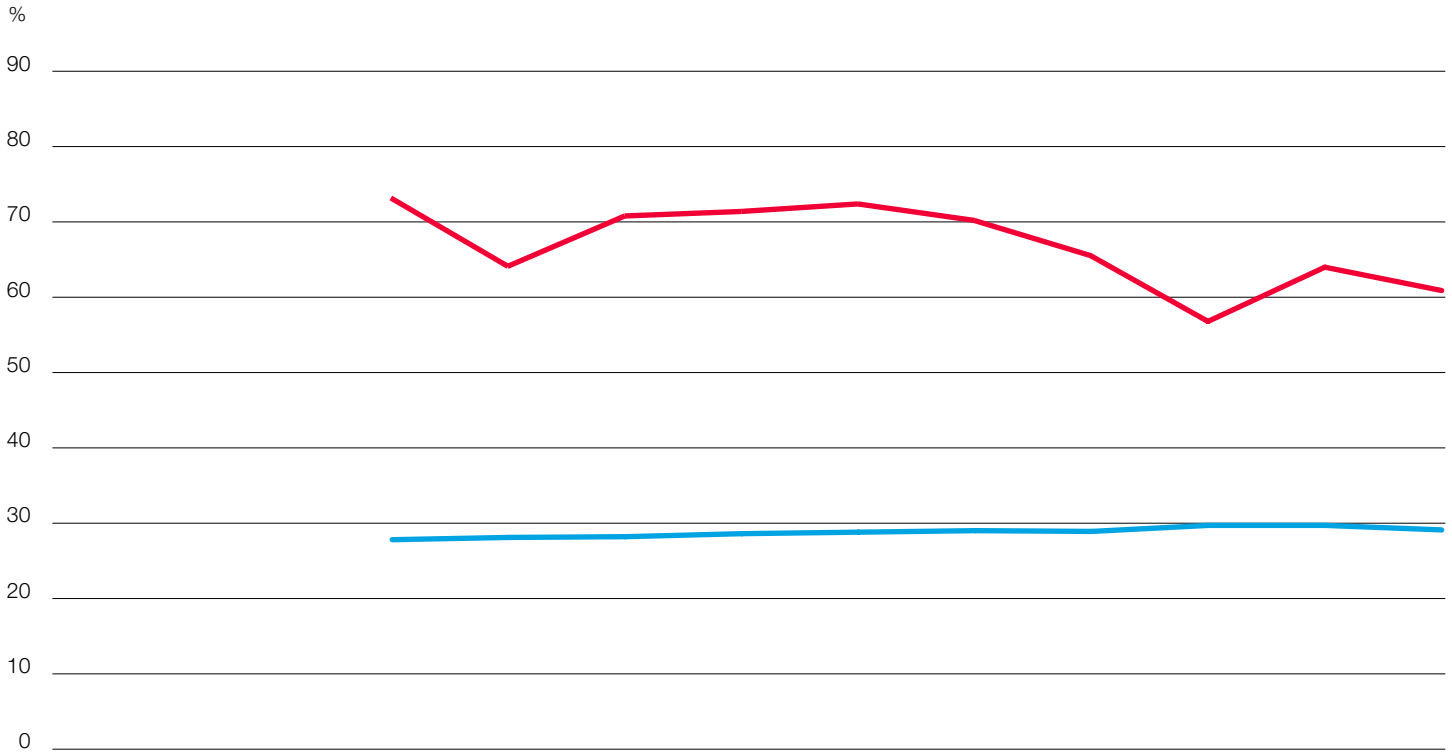
Totals shown in this table are for the calendar year 2018.

Numbers in employment in the film industry are shown to the nearest 1,000 and for all UK industries are shown to the nearest 500,000 but percentages are based on unrounded numbers.

Image: *You Were Never Really Here* courtesy of StudioCanal

As Figure 9 shows, the London and South East share of the film and video production workforce is consistently higher than the equivalent share for all UK industries. While the data, which shows a range between 57%-73%, would seem to reflect the differing levels of production activity based in the capital and the surrounding major studios, in part the variation arises from the small sample size of the survey at industry sub-sector level. The percentage of the total workforce based in London and the South East has remained fairly stable at around 28%-30%.

Figure 9 London and South East percentage share of the film and video production and total workforce, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Film and video production	73.2	64.1	70.8	71.4	72.4	70.2	65.5	56.8	64.0	60.9
UK all industries	28.1	28.4	28.5	28.9	29.1	29.3	29.2	30.0	30.0	29.4

Source: Office for National Statistics, Annual Population Survey

THE SCALE OF THE WORKPLACE

Tables 10 to 12 show the numbers of employees, by size of workplace, for film and video production, film and video distribution, and film exhibition.

Employment data

The data in tables 10 to 12 are from the Inter-Departmental Business Register (IDBR), which is maintained by the Office for National Statistics (ONS). These data differ from the estimates shown in the previous sections, which are based on the Annual Population Survey (APS). The APS counts the number of people employed whereas the IDBR, which is updated from administrative sources and from surveys of employers, includes numbers of jobs. The numbers of jobs and the numbers of people employed are not the same thing, and the data come from different sources, but the estimates arising from them should be similar. However, as the figures for 2018 show, this is not always the case. The ONS has identified a number of reasons for differences between the estimates, but the two most important ones when looking at particular industry sub-sectors are likely to be sampling error arising from the small APS sample size at industry sub-sector level and the fact that there are two classification processes involved. In the APS, individuals are classified by industry depending on the industrial information they give, whereas in the IDBR the classification is based on companies' activities. As people and companies often work across more than one industry (television and film, for example) this gives rise to unpredictable variations between the APS and the IDBR measures.

In 2018, the film and video production sector had a very large number of workplaces with low numbers of employees. As Table 10 shows, workplaces with 10 employees or less accounted for 96.5% of all workplaces in the sector and just over half of its total workforce (51%). At the other end of the scale, there were a small number of workplaces with high numbers of employees. The 85 workplaces with 50 or more employees accounted for over 13,200 employees, an average of 156 each.

Table 10 Numbers of employees in film and video production by size of workplace for the UK, 2018

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	85	0.6	13,225	31.5
11 - 49	385	2.9	7,487	17.9
1 - 10	12,945	96.5	21,222	50.6
Total	**13,415**	**100.0**	**41,934**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

Employment in the film and video distribution sector in 2018 was less concentrated in small workplaces than the production sector, with 83% of employees based in workplaces with 11 or more employees and 65% of employees based in workplaces with 50 or more employees (Table 11).

Table 11 Numbers of employees in film and video distribution by size of workplace for the UK, 2018

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	15	3.0	3,723	64.8
11 - 49	50	10.0	1,047	18.2
1 - 10	435	87.0	974	17.0
Total	**500**	**100.0**	**5,744**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

While workplaces with 10 employees or less made up the majority of workplaces in the previous two sectors, for film exhibition the reverse is true (Table 12). Workplaces with 10 employees or less accounted for 35% of total workplaces and 6% of total employees, while workplaces with 11 or more employees accounted for 65% of total workplaces and 94% of employees.

Table 12 Numbers of employees in film exhibition by size of workplace for the UK, 2018

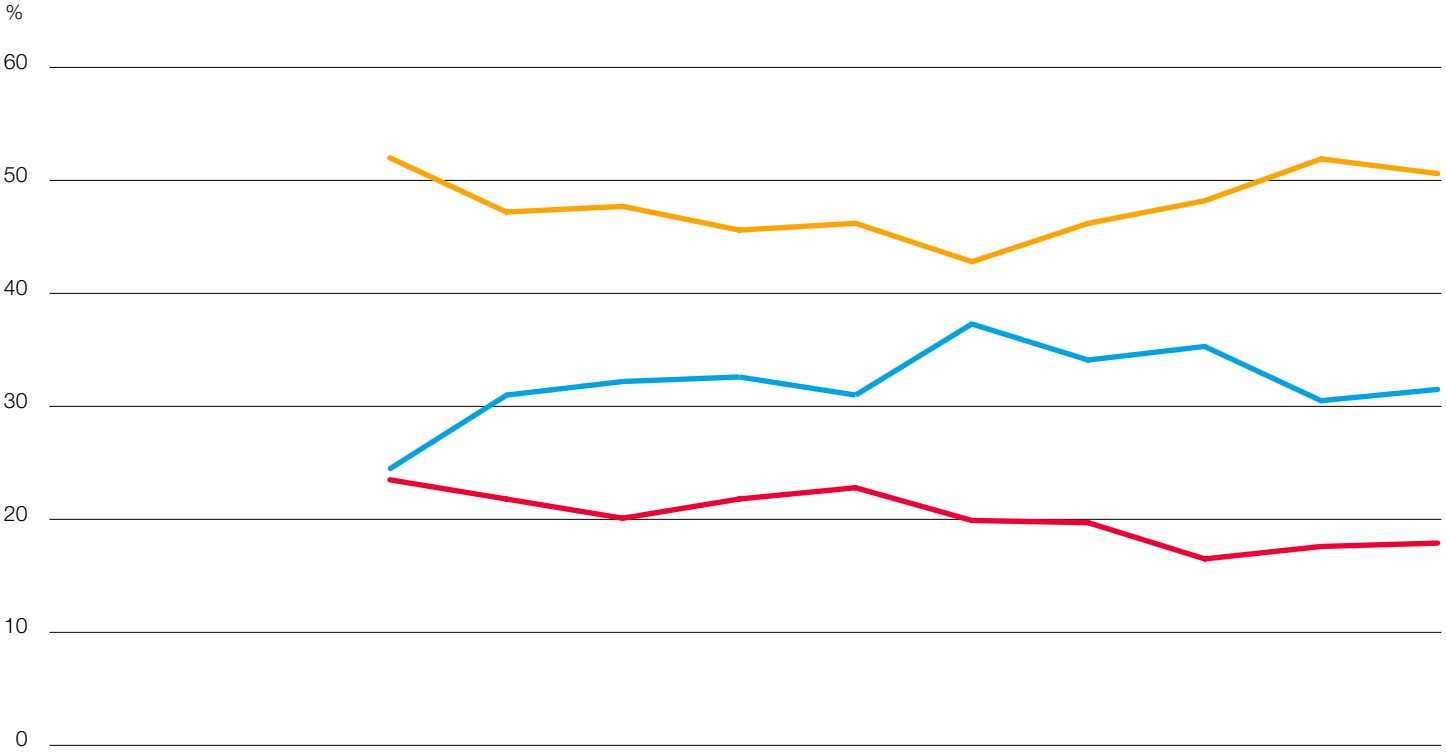
Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	125	15.2	9,247	41.5
11 - 49	410	49.7	11,655	52.3
1 - 10	290	35.2	1,377	6.2
Total	**825**	**100.0**	**22,279**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

Note: Percentages may not sum to 100 due to rounding.

Figure 10 shows the percentage of film and video production sector employees in workplaces with 1-10, 11-49, and 50 or more employees from 2009 to 2018. The share of the workforce in workplaces with 1-10 employees fell from 52% in 2009 to a low of 43% in 2014 and since then has grown to 51%, while the share of employees in larger workplaces (50+ employees) increased from 24.5% in 2009 to 31.5% in 2018, although this is down from a period high of 37% in 2014. The data shows a downward trend for the share of film and video production sector employees in workplaces with 11-49 employees, which decreased from 23.5% in 2009 to 18% in 2018.

Figure 10 Film and video production employees by workplace size band, percentage of total, 2009-2018

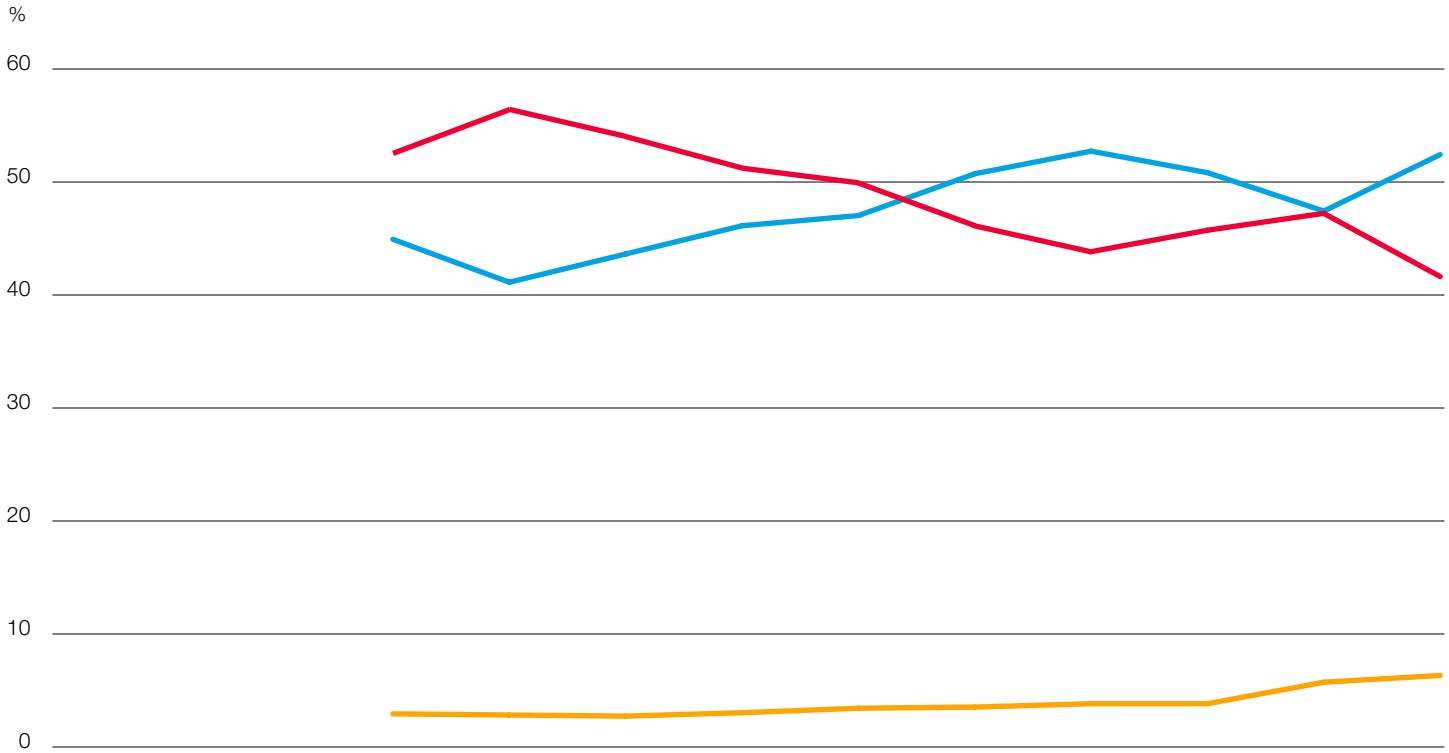


	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
50+ employees	24.5	31.0	32.2	32.6	31.0	37.3	34.1	35.3	30.5	31.5
11-49 employees	23.5	21.8	20.1	21.8	22.8	19.9	19.7	16.5	17.6	17.9
1-10 employees	52.0	47.2	47.7	45.6	46.2	42.8	46.2	48.2	51.9	50.6

Source: Office for National Statistics, Inter-Departmental Business Register

As Figure 11 shows, between 2009 and 2018, the share of film exhibition sector employees in workplaces with 50 or more workers has increased or declined in almost direct proportion to the opposite movement in the share of employees in workplaces with 11-49 employees. In the first five years of the period, the greatest share of the workforce was based in workplaces with 50 employees or more but in the second half of the period the greatest share of employees was found in workplaces with 11-49 employees. The percentage of employees in the smallest workplace band has shown a general upward trend over the period; the share more than doubled between 2009 and 2018, rising from 2.8% to 6.2%.

Figure 11 Film exhibition employees by workplace size band, percentage of total, 2009-2018



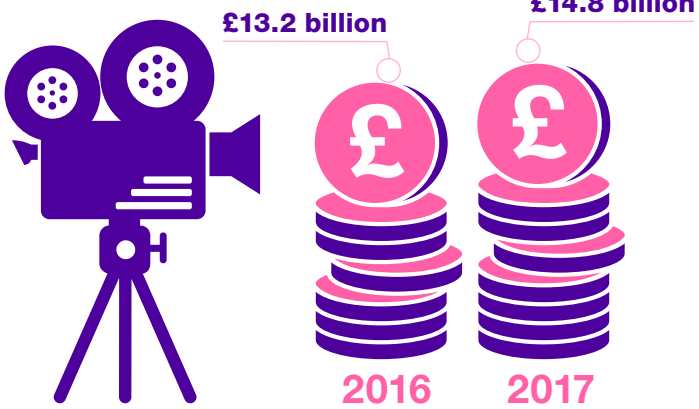
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
50+ employees	52.4	56.3	53.9	51.1	49.8	46.0	43.7	45.6	47.1	41.5
11-49 employees	44.8	41.0	43.5	46.0	46.9	50.6	52.6	50.7	47.3	52.3
1-10 employees	2.8	2.7	2.6	2.9	3.3	3.4	3.7	3.7	5.6	6.2

Source: Office for National Statistics, Inter-Departmental Business Register

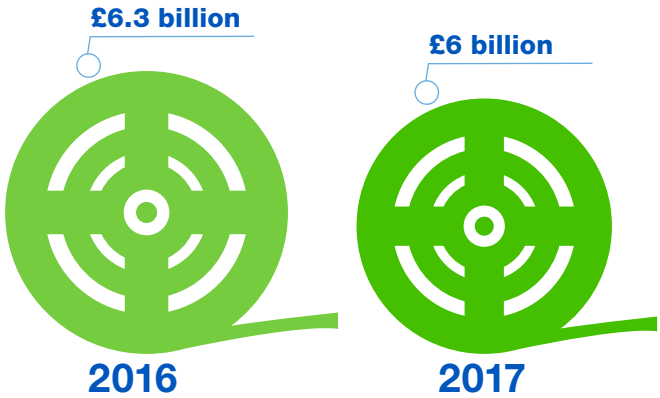
THE UK FILM ECONOMY

Facts in focus

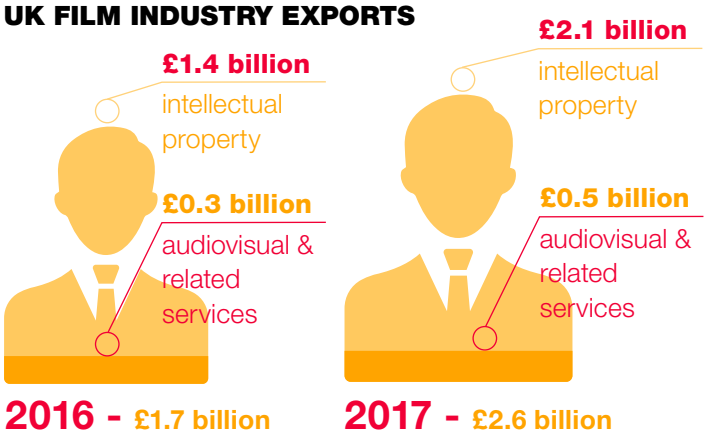
FILM INDUSTRY TURNOVER



UK FILM INDUSTRY CONTRIBUTION TO GDP



UK FILM INDUSTRY EXPORTS



FILM TRADE BALANCE

In 2017 the film industry generated a trade surplus for the UK of

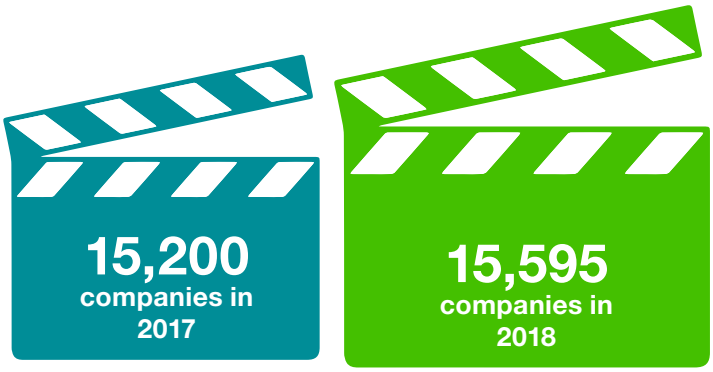
£1.45 billion

up from

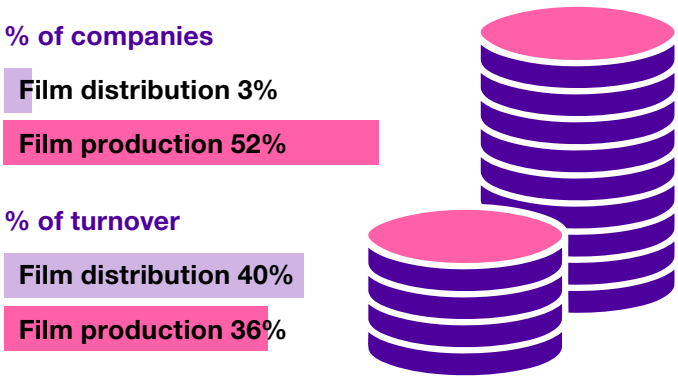
£926 million

in 2016

FILM INDUSTRY COMPANIES



SHARE OF COMPANIES AND TURNOVER



COMPANY SIZE

Across all sectors the majority of companies were very small with turnover of less than £250,000. The exhibition sector had the greatest proportion of large companies, the top 10 of which generated 91% of the sector's total turnover in 2018

GEOGRAPHICAL DISTRIBUTION OF COMPANIES

In 2018, 70% of all film companies were concentrated in London and the South East, generating 79% of turnover, but companies in the exhibition sector were more widely spread across the UK, with 74% of companies and 42% of turnover associated with exhibitors based outside London

The UK film economy

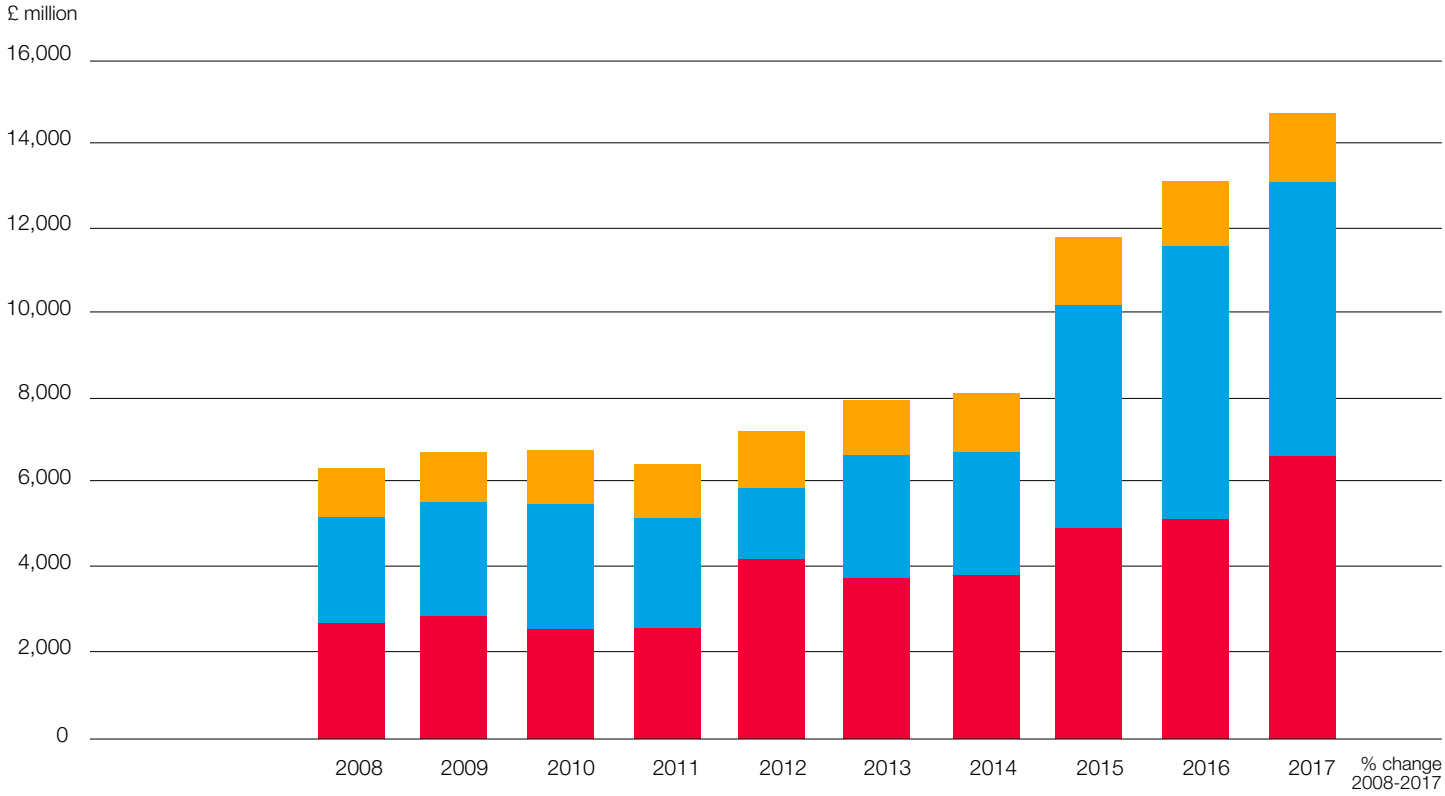
FILM INDUSTRY TURNOVER, 2008-2017

Figure 1 shows the total turnover of the UK's three main film industry sectors (film and video production, film and video distribution and film exhibition) for the 10-year period 2008-2017. Each of the three sectors has shown growth over the decade, with total industry turnover increasing by 132% from £6.4 billion in 2008 to £14.8 billion in 2017, largely due to the increase in production and distribution turnover. However, for 2009, 2011 and 2012 the turnover for film and video distribution includes only film distribution as the data for video distribution are not disclosed to maintain confidentiality.

The chart shows that turnover for film distribution decreased substantially from £2.6 billion in 2011 to £1.7 billion in 2012 but, according to the Office for National Statistics, this is mainly due to the restructuring of some businesses and the resultant changes to their industrial classifications. (For details of the Standard Industrial Classification [SIC] framework, see the notes to Figure 1.) The reclassifications are contained within the SIC code 5913 (film, video and TV programme distribution). Between 2013 and 2017, the combined turnover for film and video distribution increased by 122% from £2.9 billion to £6.5 billion.

Image: *Rudeboy: The Story of Trojan Records* courtesy of Pulse Films

Figure 1 Total turnover of UK film industry by sector, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2008-2017
Film and video production (including post-production)	2,717	2,889	2,596	2,619	4,238	3,793	3,852	4,969	5,170	6,678	145.8
Film and video distribution	2,524	2,710	2,950	2,592	1,680	2,912	2,926	5,270	6,447	6,479	156.7
Film exhibition	1,141	1,176	1,257	1,270	1,325	1,299	1,379	1,593	1,551	1,625	42.4
Total	**6,382**	**6,775**	**6,803**	**6,481**	**7,243**	**8,004**	**8,157**	**11,832**	**13,168**	**14,782**	**131.6**

Source: Office for National Statistics Annual Business Survey

Notes:

'Total turnover' is expressed in current values, i.e. not adjusted for inflation.

Standard Industrial Classification (SIC) codes are used to classify businesses according to the type of their economic activity. The classifications were last revised in 2003 and 2007. The SIC codes can be found at https://www.gov.uk/government/publications/standard-industrial-classification-of-economic-activities-sic.

From 2008 onwards, we define film and video production as the sum of 2007 SIC codes 59111 (film production), 59112 (video production) and 5912 (film, video and TV post-production), film and video distribution is the sum of 59131 (film distribution) and 59132 (video distribution) and film exhibition is 5914 (film exhibition).

For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV programme distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

Data for 2015 and 2016 have been revised since publication of the 2018 Statistical Yearbook.

The 2007 SIC codes allow for a more detailed breakdown of industry turnover by sub-sector, as shown in Table 1. This gives an official measure of film production and distribution separate from video production and distribution. The figures reflect the high sunk costs associated with the production and marketing of feature films and highlight the importance of the post-production sector (20% of turnover, although this includes activity associated with video and TV as well as film).

Table 1 Total turnover of UK film industry by sub-sector, 2017

Sub-sector	Turnover (£ million)	% of total
Film production	3,034	20.5
Video production	687	4.6
Film, video and TV post-production	2,957	20.0
Film distribution	6,430	43.5
Video distribution	49	0.3
Film exhibition	1,625	11.0
Total	**14,782**	**100.0**

Source: Office for National Statistics Annual Business Survey

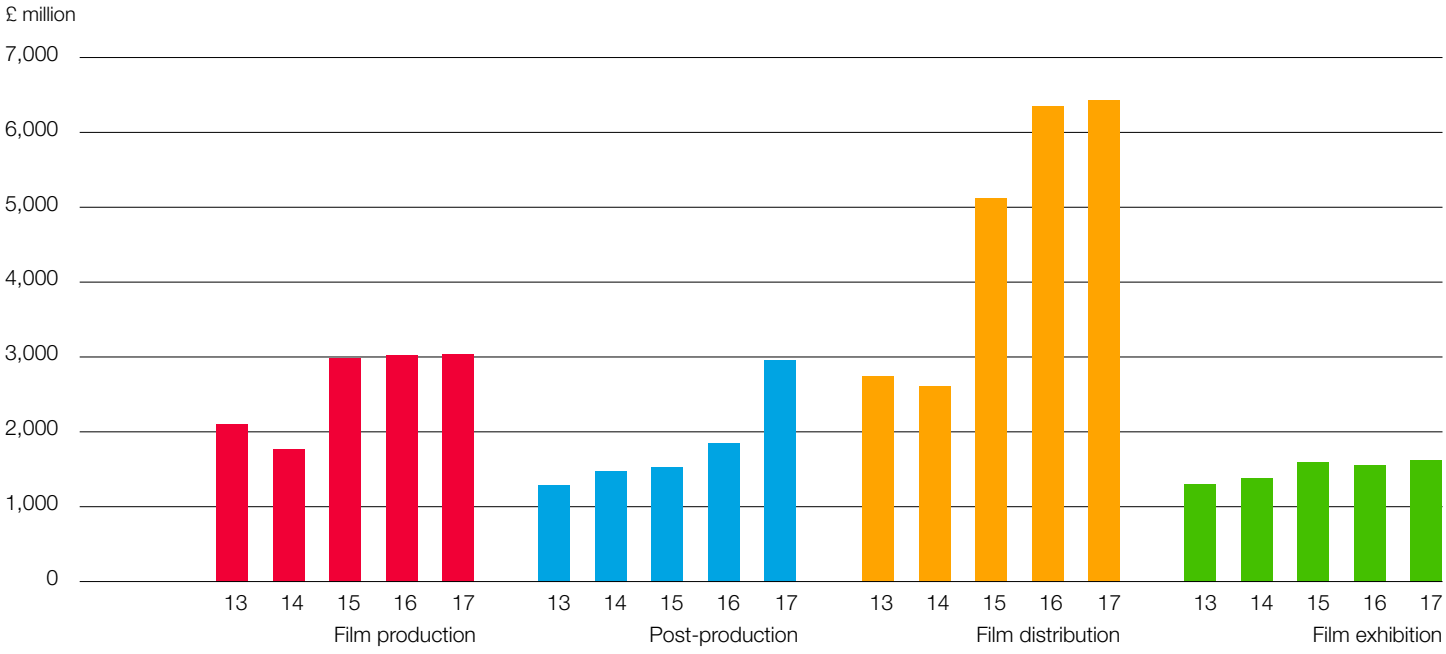
Notes:

Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Percentages may not sum to 100 due to rounding.

Figure 2 shows the turnover for film production, film, video and TV post-production, film distribution and film exhibition from 2013 to 2017. Distribution had the highest annual turnover of all film industry sub-sectors throughout the period. Alongside production and exhibition, turnover for distribution in 2017 saw a slight increase compared with 2016. The year-on-year increase in turnover for post-production in 2017, however, was significant, with revenues up 60% on 2016.

Figure 2 Total turnover of film sub-sectors, 2013-2017



	Film production	Post-production	Film distribution	Film exhibition
2013	2,103	1,294	2,748	1,299
2014	1,769	1,480	2,615	1,379
2015	2,989	1,525	5,126	1,593
2016	3,023	1,851	6,357	1,551
2017	3,034	2,957	6,430	1,625

Source: Office for National Statistics Annual Business Survey

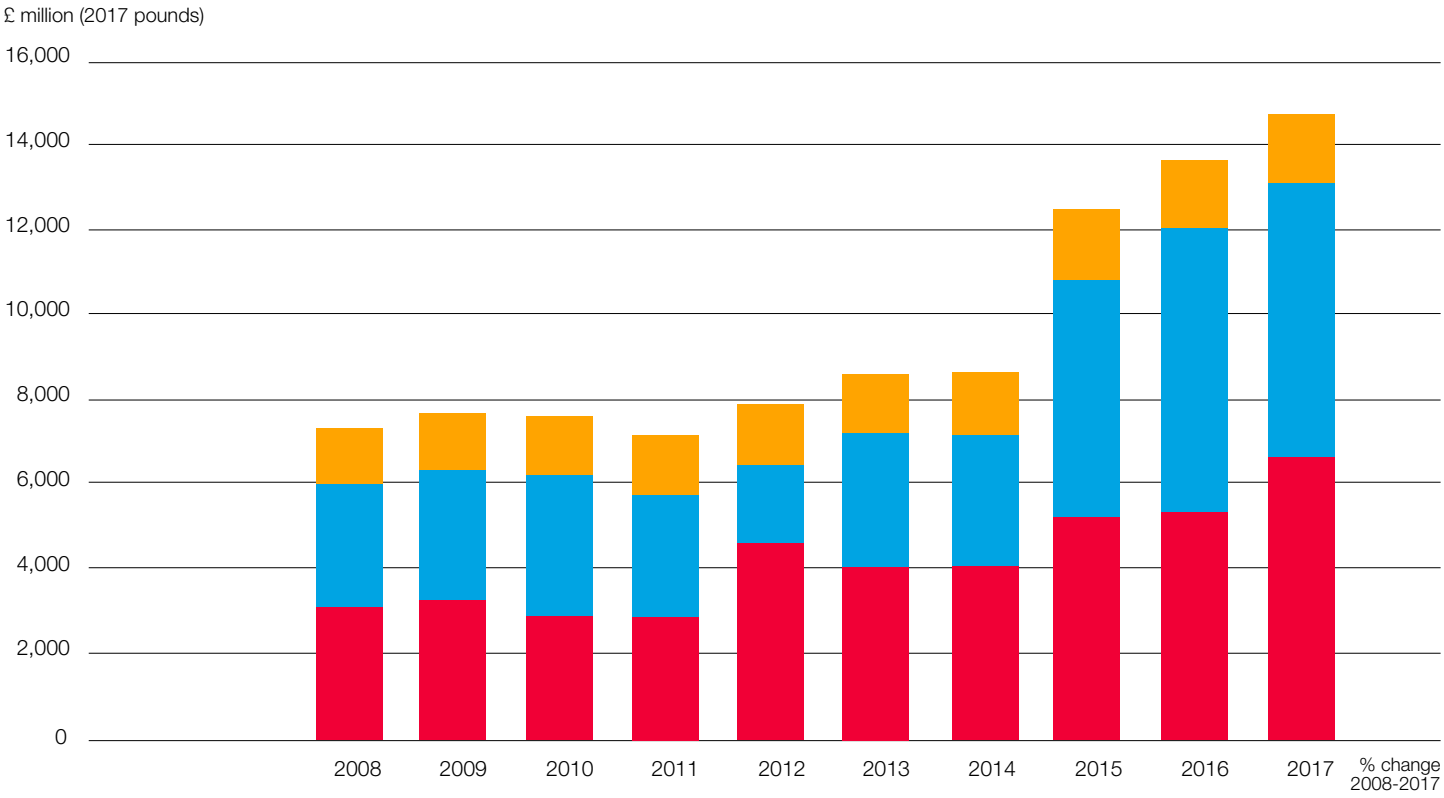
Notes:

See notes to Table 1.

Data for 2015 and 2016 have been revised since publication of the 2018 Statistical Yearbook.

Total industry turnover between 2008 and 2017 expressed in real terms, i.e. with the effects of inflation removed, is shown in Figure 3. The real increase since 2008 has been 123% for film and video distribution, 113% for film and video production (including post-production) and 23.5% for film exhibition. Overall, in real terms, the industry in 2017 was double its size in 2008.

Figure 3 Inflation-adjusted turnover of UK film industry by sector, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2008-2017
Film and video production (including post-production)	3,134	3,293	2,925	2,907	4,644	4,093	4,096	5,263	5,376	6,678	113.1
Film and video distribution	2,911	3,089	3,323	2,877	1,841	3,142	3,111	5,582	6,704	6,479	122.6
Film exhibition	1,316	1,340	1,416	1,409	1,452	1,402	1,466	1,687	1,613	1,625	23.5
Total	**7,360**	**7,722**	**7,664**	**7,192**	**7,938**	**8,637**	**8,673**	**12,532**	**13,692**	**14,782**	**100.8**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey, HM Treasury

Notes:

The deflator used to calculate real values is the UK whole economy deflator, which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2019-quarterly-national-accounts.

Values expressed in constant 2017 pounds.

For sector classifications, see notes to Figure 1.

For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

Figures may not sum to totals due to rounding.

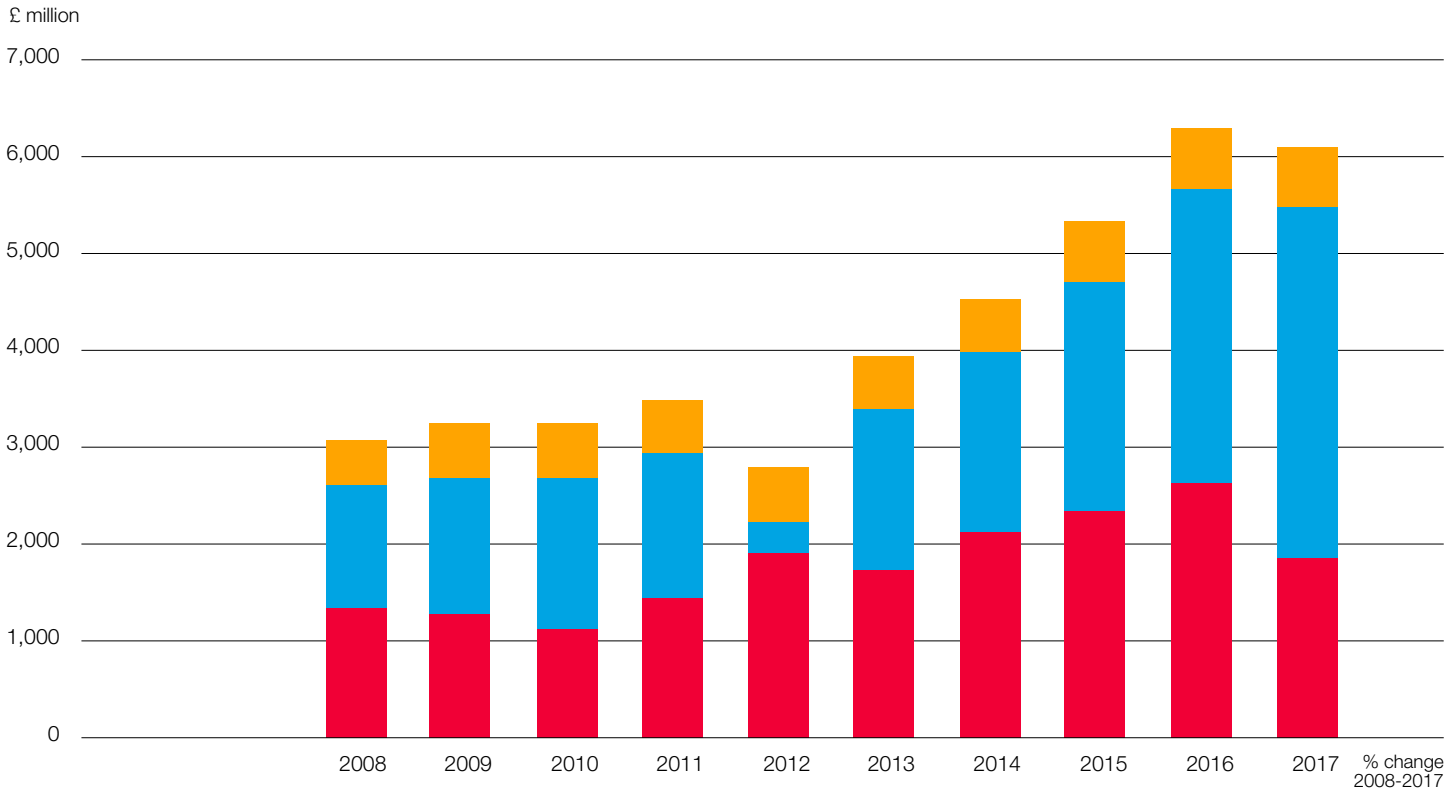
FILM INDUSTRY CONTRIBUTION TO GDP, 2008-2017

The direct contribution an industry makes to UK Gross Domestic Product (GDP) is measured by its gross value added (GVA). 'Value added' is industry turnover minus the cost of inputs bought from other industries. The main components of value added are wages and salaries, interest and company profits. Value added is therefore a measure of an industry's ability to generate income for its workers, company owners and investors.

The UK film industry's GVA in 2017 was £6 billion. According to data published by the government in November 2018, the GVA for all UK creative industries in 2017 was £101.5 billion, so film accounted for just under 6% of all creative industries' value added.

As Figure 4 shows, since 2008, GVA for film has increased by 97%. In 2017, for the film industry as a whole, distribution accounted for 59% of the total value added, production (including post-production) 31% and exhibition 10%. (As with turnover, the value added for film distribution decreased significantly between 2011 and 2012 due to the reclassification of businesses in the distribution sector.)

Figure 4 UK film industry gross value added, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2008-2017
Film and video production (including post-production)	1,342	1,275	1,071	1,495	1,976	1,766	2,187	2,325	2,618	1,862	38.7
Film and video distribution	1,317	1,517	1,706	1,442	249	1,680	1,848	2,360	3,052	3,596	173.0
Film exhibition	415	466	483	505	567	511	513	616	605	604	45.5
Total	**3,074**	**3,258**	**3,260**	**3,442**	**2,792**	**3,957**	**4,548**	**5,301**	**6,275**	**6,062**	**97.2**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey

Notes:

'Gross value added' is expressed in actual values, i.e. not adjusted for inflation.

For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the 4-digit class total (5913) minus TV distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

Data for 2015 and 2016 have been revised since publication of the 2018 Statistical Yearbook.

Table 2 shows the GVA breakdown in 2017 by the 2007 SIC codes. The Office for National Statistics reports a negative GVA for both film production (-£482 million) and video distribution (-£22 million) for the year. In the case of film production this is primarily due to investments in projects that show returns in later years.

The highest single contributor to the film industry's GVA in 2017 was film distribution (£3.6 billion; 60% of the total) followed by film, video and TV post production (£1.9 billion; 31% of the total).

Table 2 UK film industry gross value added by sub-sector, 2017

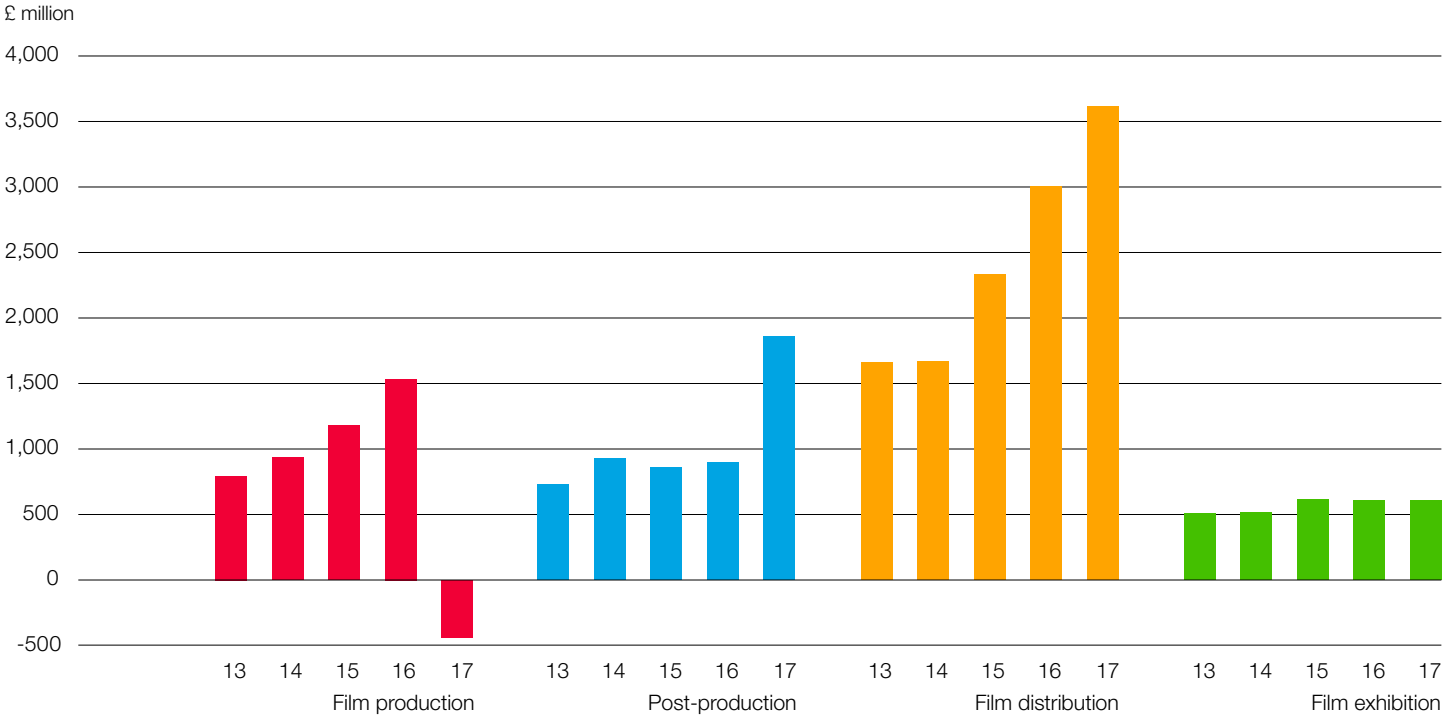
Sub-sector	GVA (£ million)	% of total
Film production	-482	-8.0
Video production	487	8.0
Film, video and TV post-production	1,857	30.6
Film distribution	3,618	59.7
Video distribution	-22	-0.4
Film exhibition	604	10.0
Sector total	**6,062**	**100.0**

Source: Office for National Statistics Annual Business Survey

Note: Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Figure 5 shows the breakdown of GVA by sub-sector from 2013 to 2017. As with turnover, film distribution consistently had the highest value added over the period. Film distribution GVA increased each year between 2013 and 2017, rising from £1.7 billion to £3.6 billion. With the exception of 2017, film production accounted for the second highest value added over the period; its GVA rose from just under £800 million in 2013 to £1.5 billion in 2016, before falling to nearly -£500 million in 2017. Post-production recorded the greatest increase in GVA over the period, rising by 155% from just over £700 million in 2013 to £1.9 billion in 2017.

Figure 5 Gross value added of film sub-sectors, 2013-2017



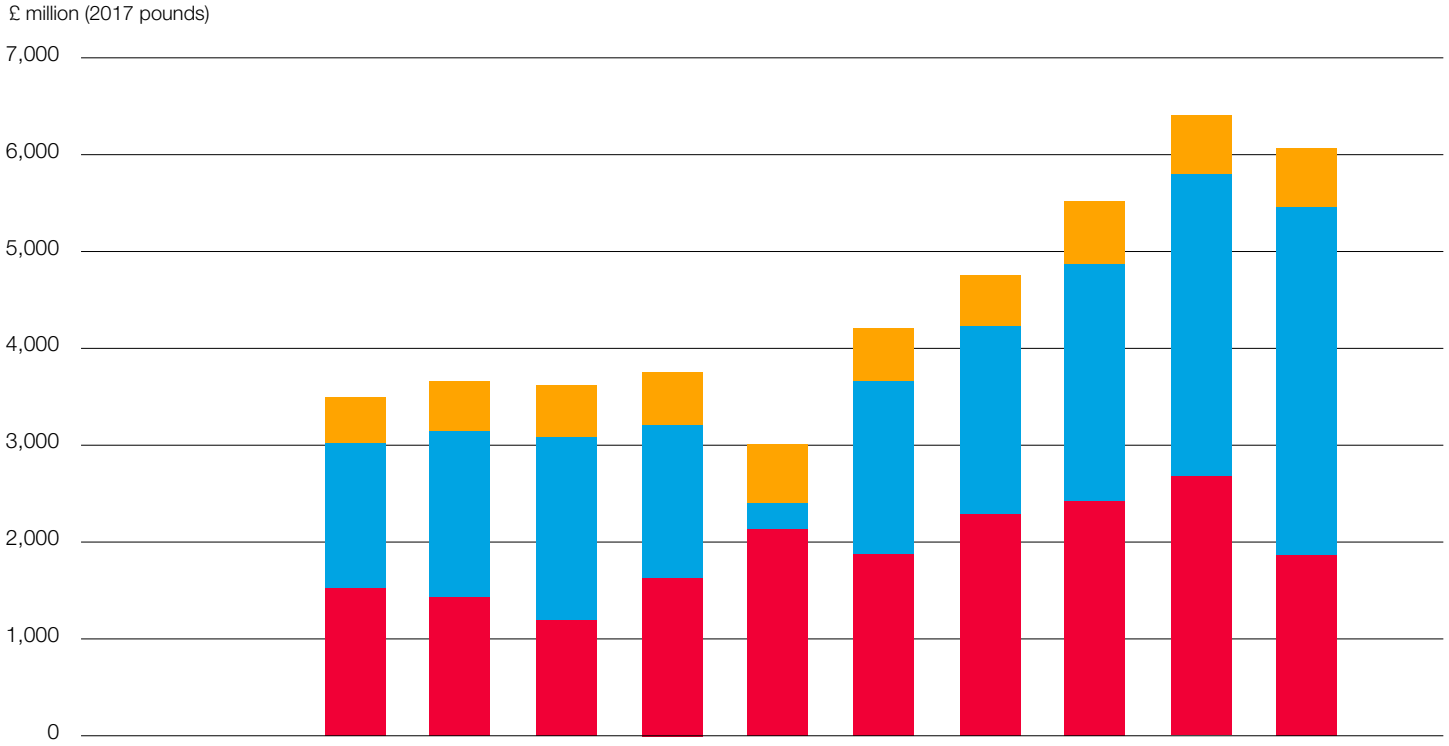
	Film production	Post-production	Film distribution	Film exhibition
2013	797	729	1,658	511
2014	938	927	1,670	513
2015	1,183	857	2,334	616
2016	1,538	895	3,003	605
2017	-482	1,857	3,618	604

Source: Office for National Statistics Annual Business Survey

See notes to Table 2.

Figure 6 shows the industry's value added expressed in real terms, i.e. with the effects of inflation removed. For the four years 2008 to 2011, real GVA was around £3.5 billion-£3.7 billion (in 2017 pounds) but decreased to £3 billion in 2012. The decrease was mainly due to the reduction in GVA for film distribution caused by the reclassification of companies within the distribution sector. However, the distribution element increased substantially in 2013. In real terms, GVA for the film industry as a whole in 2017 was 73% higher than its value in 2008.

Figure 6 UK film industry real gross value added, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2008-2017
Film and video production (including post-production)	1,526	1,432	1,189	1,634	2,132	1,875	2,286	2,421	2,674	1,862	22.0
Film and video distribution	1,498	1,704	1,894	1,576	269	1,783	1,932	2,457	3,118	3,596	140.1
Film exhibition	472	524	536	552	612	542	536	641	618	604	28.0
Total	**3,496**	**3,660**	**3,619**	**3,762**	**3,012**	**4,201**	**4,755**	**5,520**	**6,410**	**6,062**	**73.4**

Source: Office for National Statistics Annual Business Inquiry, HM Treasury

Notes:

The deflator used to calculate real values is the UK whole economy deflator, which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2019-quarterly-national-accounts.

Values expressed in constant 2017 pounds.

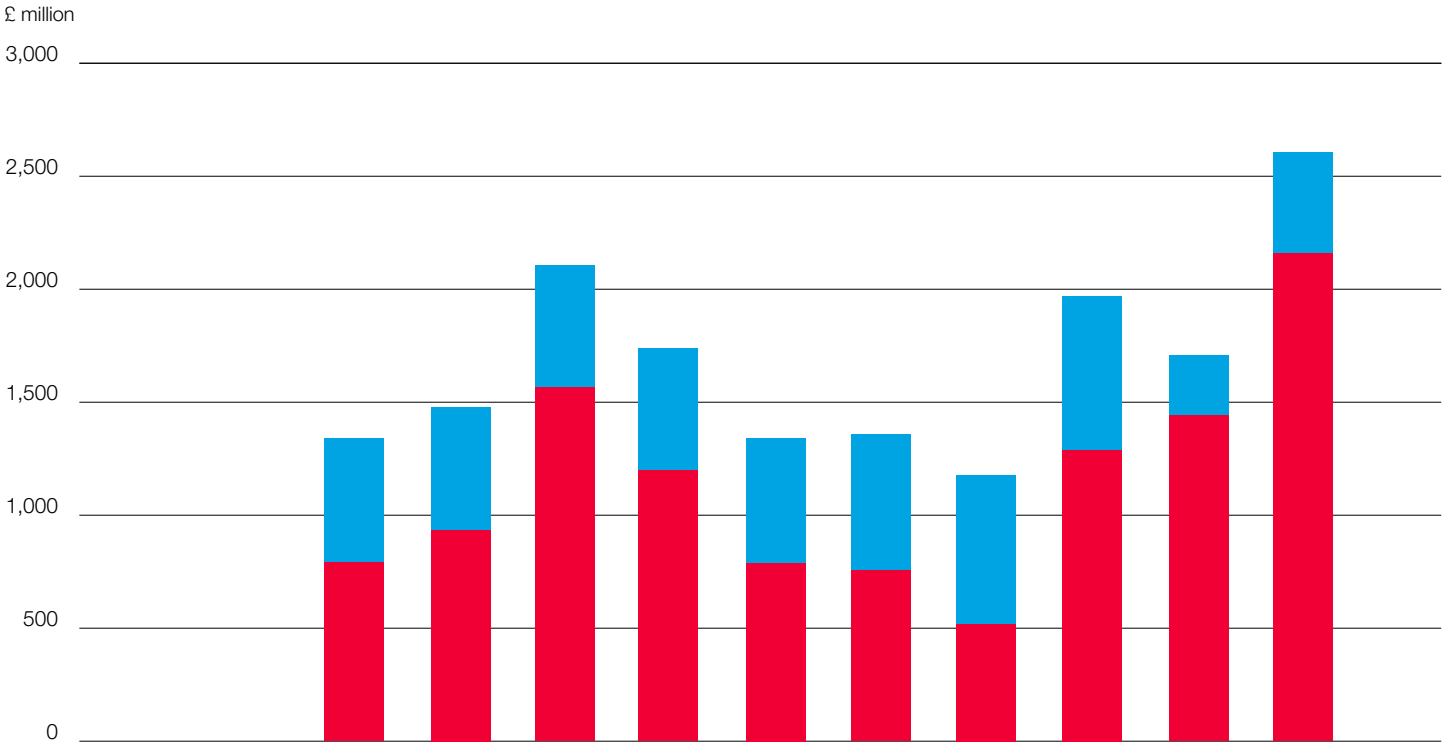
For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the 4-digit class total (5913) minus TV distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

FILM EXPORTS, 2008-2017

The UK film industry exported a record £2.6 billion worth of services in 2017 (the latest year for which data are available), of which £2.2 billion (83%) comprised royalties earned overseas from the exploitation of UK intellectual property and £0.5 billion (17%) comprised the sale of UK-based audiovisual and related services to foreign investors (Figure 7). The export value of intellectual property increased by 50% compared with 2016, while the export value of audiovisual and related services increased by 67%. Overall, the value of film exports in 2017 was 94.5% greater than in 2008.

Figure 7 UK film industry exports, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2008-2017
Intellectual property	792	935	1,566	1,199	792	756	519	1,289	1,441	2,158	172.5
Audiovisual and related services	549	541	541	540	550	605	655	679	269	450	18.0
Total	**1,341**	**1,476**	**2,107**	**1,739**	**1,342**	**1,361**	**1,174**	**1,968**	**1,710**	**2,608**	**94.5**

Source: Office for National Statistics Annual Survey of International Trade in Services

Notes:

Data for 2018 is expected to be available at the end of January 2020.

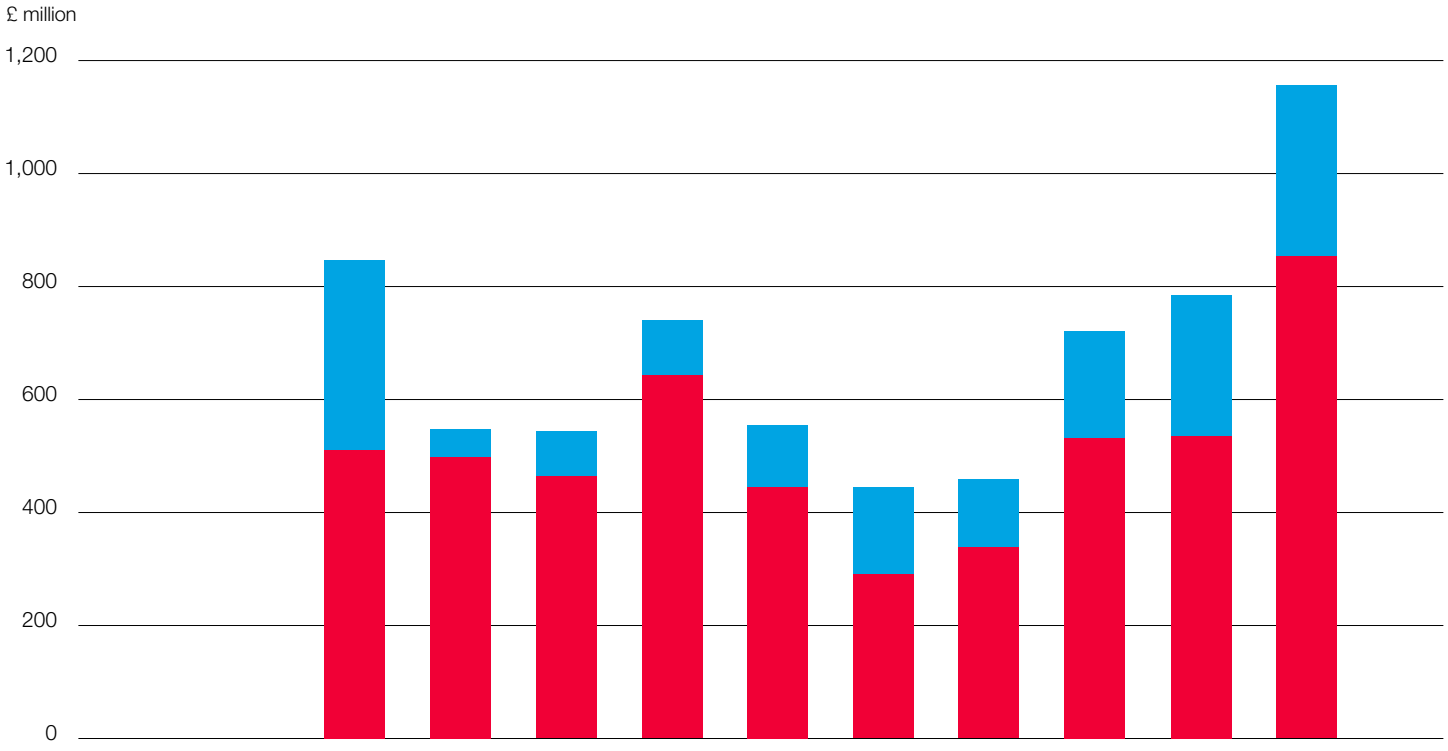
This chart shows the results for film companies only. Import and export data for 2008 is derived from the Office for National Statistics (ONS) Film and Television Survey which was a sample survey with a high response rate (87%) of companies in the Inter-Departmental Business Register in the SIC codes relating to film and television. This survey was discontinued and film and television data for 2009 and later were collected in the ONS Annual Survey of International Trade in Services.

FILM IMPORTS, 2008-2017

The UK film industry imported £1.2 billion worth of services in 2017, of which £853 million (74%) comprised intellectual property and £304 million (26%) comprised audiovisual and related services.

As Figure 8 shows, the pattern of UK film imports differs to that of exports. In most years, intellectual property made up the vast majority of imports with audiovisual and related services accounting for only around 15%-20% of the total. However, the share for services was 30% or above in both 2013 and 2016, and as high 40% in 2008. The reasons for the increased share in these years are unclear as the reported level of imports for services is relatively high in relation to total UK film production for these years. One possible explanation could be the categorisation of the non-UK spend of UK/USA inward investment productions as imports of services by the UK subsidiaries of major US studios. However, this explanation cannot be confirmed as the survey returns are confidential.

Figure 8 UK film industry imports, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2008-2017
Intellectual property	510	498	463	642	445	290	338	532	535	853	67.3
Audiovisual and related services	336	49	80	98	108	155	121	188	249	304	9.5
Total	**846**	**547**	**543**	**740**	**553**	**445**	**459**	**720**	**784**	**1,157**	**36.9**

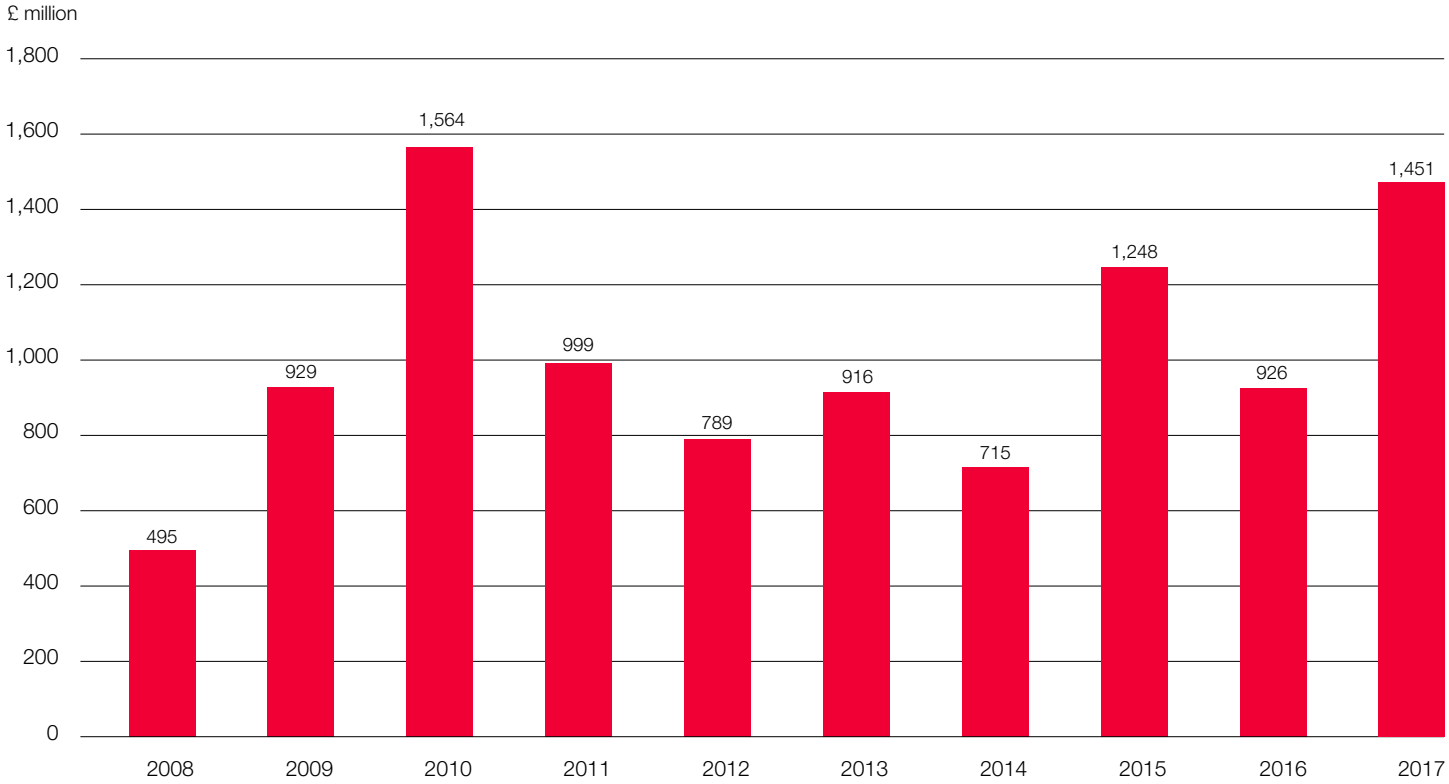
Source: Office for National Statistics Annual Survey of International Trade in Services

See notes to Figure 7.

THE FILM TRADE BALANCE, 2008-2017

The film industry made a continuous positive contribution to the UK balance of payments between 2008 and 2017, as Figure 9 shows. The trade surplus (positive balance of exports over imports) in 2017 was £1.45 billion, the second highest recorded surplus of the 10-year period.

Figure 9 Trade surplus of UK film industry, 2008-2017



Source: Office for National Statistics Annual Survey of International Trade in Services

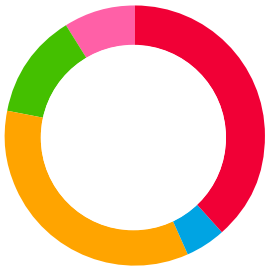
Note: 'Trade surplus' equals exports minus imports. Where a company (e.g. the UK subsidiary of a US major) receives income from another country on behalf of its parent company and subsequently passes it on to its parent company, this is recorded both as a receipt and a payment, leaving the measure of the trade surplus unaffected.

FILM EXPORT MARKETS

Figure 10 shows the geographic distribution of UK film exports for the years 2013-2017. The leading export destinations were the European Union (38.5%) and the USA (35%). This is the second time since our records began that exports to the EU surpassed those to the USA over a five-year period (the first occurrence was 2009-2013). Notably, Asia's share of exports was at a record high of 13%. The increased share for exports to Asia was driven largely by a surge in demand in the burgeoning Chinese market. (In 2012-2016, China accounted for 0.3% of the UK's total film exports, compared with 3% in 2013-2017.) Exports to European countries not in the EU accounted for 5% of all exports, while the rest of the world accounted for 9%.

Figure 10 Destination of UK film exports as percentage of the total, 2013-2017

	%
EU	38.5
Other Europe	4.9
USA	34.7
Asia	13.0
Rest of the world	8.8



Source: Office for National Statistics Annual Survey of International Trade in Services

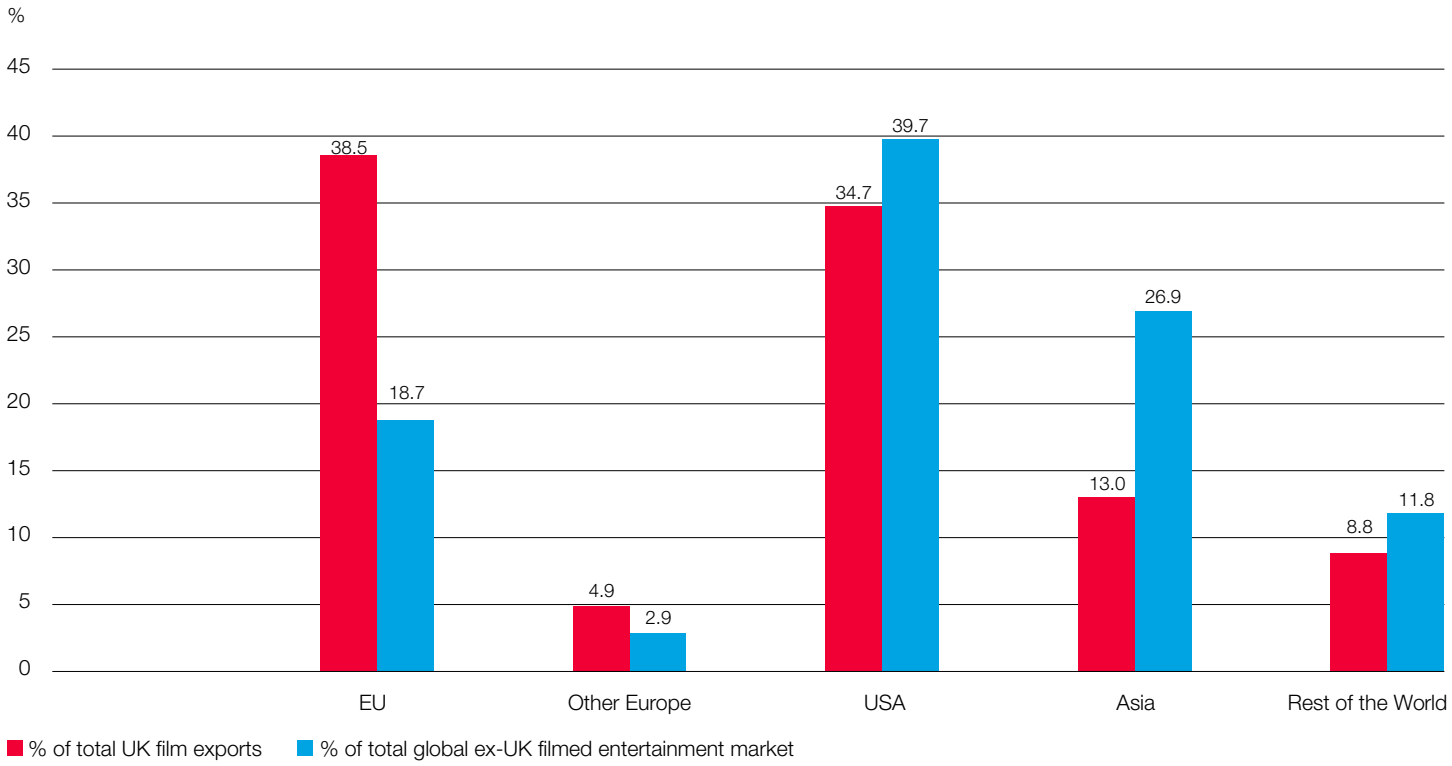
UK FILM EXPORTS COMPARED WITH THE GLOBAL MARKET FOR FILMED ENTERTAINMENT

A useful comparison can be made between UK film export shares and the geographical distribution of the global market for filmed entertainment (Figure 11). For the EU and 'other Europe' the shares of UK exports in the period 2013-2017 were higher than the shares of the ex-UK global filmed entertainment market in those regions, whereas the reverse was true for the USA, Asia and 'rest of the world'. The differences that stand out are:

- The higher proportion of UK exports to the EU (38.5%) compared with the EU's 19% share of the ex-UK global filmed entertainment market; and
- The lower proportion of UK exports to Asia (13%) compared with the Asian countries' share of the ex-UK global market (27%).

The latter discrepancy reflects the strength of the main Asian countries (China, India, Japan and South Korea) in their own markets, and the consequent lower market shares for UK (and USA) films. There are also export restrictions in the Chinese market. It is worth noting, however, that the gap between UK exports to Asia compared with those countries' share of the ex-UK global market has narrowed considerably in recent years.

Figure 11 UK export shares, 2013-2017, compared with the global market for filmed entertainment, 2017



Source: Office for National Statistics Annual Survey of International Trade in Services, PwC, Global Entertainment and Media Outlook, 2019.pwc.com/outlook

THE GEOGRAPHICAL DISTRIBUTION OF THE UK'S FILM TRADE SURPLUS

The geographical distribution of the UK's film trade surplus showed a similar pattern to that of exports, although the share of the trade balance accounted for by 'rest of world' was smaller than the export share. The UK ran large film trade surpluses with both the EU and the USA in the years 2013-2017. During the period, the EU accounted for 41% of the film trade surplus, while the USA accounted for 36%.

Table 3 International transactions of the UK film industry by geographical area, annual average, 2013-2017

	Exports (£ million)	Imports (£ million)	Balance (£ million)	% balance
EU	676.8	247.0	429.8	40.9
Other Europe	86.8	30.2	56.6	5.4
USA	609.8	235.6	374.2	35.6
Asia	228.2	71.6	156.6	14.9
Rest of the world	155.0	125.2	29.8	2.8
Total	**1,756.6**	**709.6**	**1,047.0**	**100.0**

Source: Office for National Statistics Annual Survey of International Trade in Services

Note: Figures/percentages may not sum to totals/subtotals due to rounding.

Image: *A Private War* courtesy of Altitude Film Distribution

FILM INDUSTRY COMPANIES, 2014-2018

This section details the size, turnover and geographical distribution of film industry companies in the UK. The data and date range differ from the estimates shown in the previous section as they are drawn from different sources.

Data on turnover

The data in this section are from the Inter-Departmental Business Register (IDBR), which is maintained by the Office for National Statistics (ONS). These data differ from the estimates shown in the first section above, which are based on the ONS's Annual Business Survey (ABS). The ABS collects data from a sample of businesses across the UK, whereas the IDBR is a comprehensive list of businesses in the UK, compiled by combining several data sources, including VAT and PAYE data from HMRC as well as data from other business surveys conducted by the ONS. The differences between the estimates are due to variances in the sources, sample size and the time periods during which the data is collected. The estimates derived from the ABS are National Statistics and considered by the ONS to be the more robust data. These estimates tend to value down turnover compared to the IDBR.

NUMBER OF COMPANIES IN THE FILM INDUSTRY

The number of companies involved in the film industry increased by 36% between 2014 and 2018, compared to the UK all-industries average of 13% (Table 4). The majority of the growth is the result of an expansion in the number of companies working in the production sector: the number of video production companies increased by 70%, while there was a 34% increase in the number of film production companies. The growth in the former may partly be explained by the rise in demand for online audiovisual content over the period, while the latter increase may reflect the number of special purpose vehicles (SPVs) created for specific productions but which remain in existence as companies after the completion of those titles. (These SPVs will usually only be involved in the production of one film.)

In 2018, there were 8,165 film production companies, 2,915 film, video and TV post-production companies, 420 film distribution companies and 270 film exhibition companies.

Table 4 Number of companies by sub-sector, 2014-2018

Sub-sector	2014	2015	2016	2017	2018	Growth 2014-2018 (%)
Film production	6,090	6,805	7,420	8,115	8,165	34.1
Video production	2,200	2,545	2,980	3,390	3,735	69.8
Film, video and TV post-production*	2,465	2,660	2,870	2,965	2,915	18.3
Film distribution	405	420	380	395	420	3.7
Video distribution	80	85	75	80	90	12.5
Film exhibition	215	230	255	255	270	25.6
Total	**11,455**	**12,745**	**13,980**	**15,200**	**15,595**	**36.1**
UK all industries	**2,360,535**	**2,449,415**	**2,554,510**	**2,668,810**	**2,669,440**	**13.1**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2018.

All figures are rounded to the nearest 5 to avoid disclosure.

* Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

For details of the Standard Industrial Classifications (SICs) see notes to Figure 1.

Total numbers of companies for all UK industries has been updated since publication of the 2018 Statistical Yearbook.

As Table 5 shows, film production company turnover was £6.1 billion in 2018, an increase of 106% compared with 2014, film, video and TV post-production company turnover was £1.8 billion, an increase of 33% on 2014, and film exhibition company turnover was £1.6 billion, an increase of 27% on 2014. Film production and film distribution saw the largest year-on-year increases, with turnover up 35% and 39% respectively compared with 2017, while video distribution, the only sub-sector to experience an overall downward trend in turnover over the period, saw revenues fall by 32% compared with 2017.

Total film industry turnover increased by 86.5% between 2014 and 2018, rising from £9.1 billion to £17 billion.

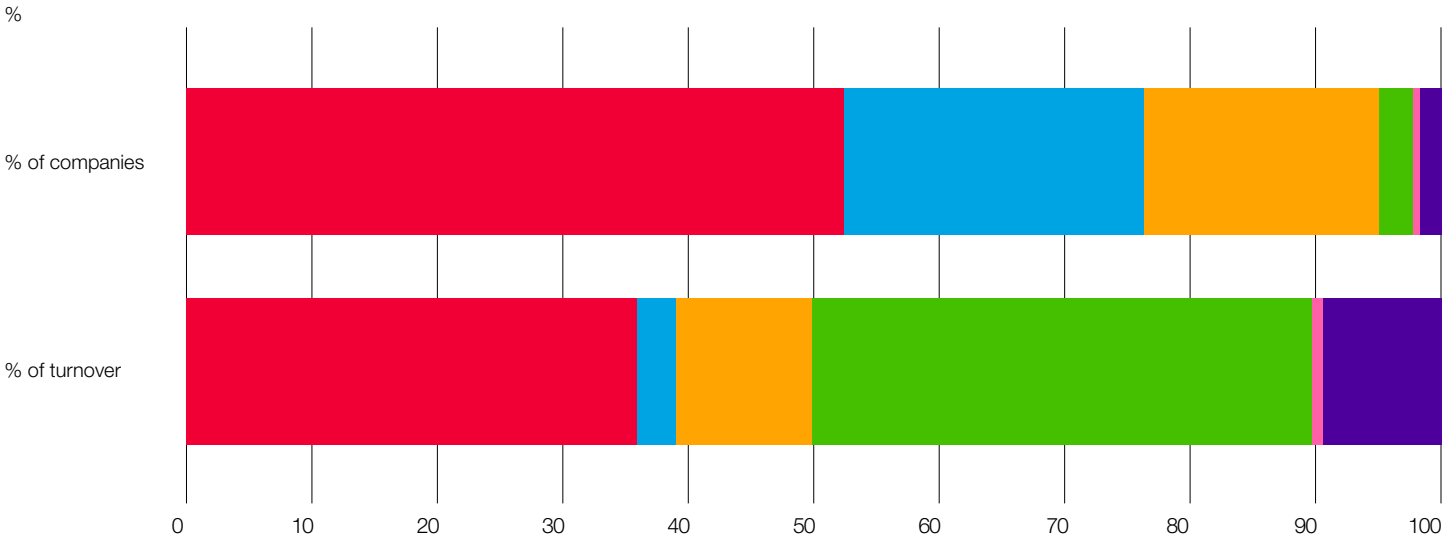
Table 5 Turnover of companies by sub-sector, £ million, 2014-2018

Sub-sector	2014	2015	2016	2017	2018	Growth 2014-2018 (%)
Film production	2,968.1	2,967.3	3,833.1	4,509.4	6,102.6	105.6
Video production	301.6	357.1	397.6	477.4	534.5	77.2
Film, video and TV post-production	1,389.3	1,477.6	1,309.1	1,800.6	1,844.1	32.7
Film distribution	2,976.4	2,776.2	4,306.2	4,871.3	6,788.4	128.1
Video distribution	214.1	187.7	233.5	190.8	129.5	-39.5
Film exhibition	1,275.6	1,339.3	1,405.0	1,593.1	1,614.9	26.6
Total	**9,125.1**	**9,105.2**	**11,484.4**	**13,442.6**	**17,013.9**	**86.5**

Source: Office for National Statistics Inter-Departmental Business Register
See notes to Table 4.

Film distributors represented 3% of film industry companies in 2018 but accounted for 40% of industry turnover (Figure 12). This reflects the dominant position of the UK subsidiaries of the major US studios in the film value chain. Film production companies represented 52% of companies and over one third of turnover (36%).

Figure 12 Percentage of film and video companies and turnover by sub-sector, 2018



	% of companies	% of turnover
Film production	52.4	35.9
Video production	23.9	3.1
Film, video and TV post-production	18.7	10.8
Film distribution	2.7	39.9
Video distribution	0.6	0.8
Film exhibition	1.7	9.5

Source: Office for National Statistics Inter-Departmental Business Register
See notes to Table 4.

SIZE DISTRIBUTION OF FILM COMPANIES

The size distribution of film companies in 2018 is shown in Tables 6 to 9. In all sectors the majority of companies were very small with an annual turnover of less than £250,000.

Table 6 Size distribution of film production companies, 2018

Turnover size band (£ million)	Number	%	Turnover (£ million)	% balance
≥5.0	190	2.3	c	c
1.0-4.99	405	5.0	767.7	12.6
0.5-0.99	315	3.9	210.9	3.5
0.25-0.49	630	7.7	210.0	3.4
0.1-0.24	2,650	32.4	379.6	6.2
0.05-0.09	2,150	26.3	157.5	2.6
<0.05	1,830	22.4	c	c
Total	**8,165**	**100.0**	**6,102.6**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2018.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Number of companies may not sum to total due to rounding.

Table 7 Size distribution of post-production companies, 2018

Turnover size band (£ million)	Number	%	Turnover (£ million)	% balance
≥5.0	45	1.5	1,250.0	67.8
1.0-4.99	115	3.9	254.6	13.8
0.5-0.99	115	3.9	78.5	4.3
0.25-0.49	150	5.1	52.6	2.9
0.1-0.24	945	32.4	124.9	6.8
0.05-0.09	935	32.1	68.3	3.7
<0.05	610	20.9	15.2	0.8
Total	**2,915**	**100.0**	**1,844.1**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2018.

Percentages may not sum to 100 due to rounding.

Table 8 Size distribution of film distribution companies, 2018

Turnover size band (£ million)	Number	%	Turnover (£ million)	% balance
≥5.0	40	9.5	6,662.3	98.1
1.0-4.99	30	7.1	c	c
0.5-0.99	40	9.5	c	c
0.25-0.49	40	9.5	13.6	0.2
0.1-0.24	100	23.8	14.8	0.2
0.05-0.09	65	15.5	5.0	0.1
<0.05	105	25.0	1.6	<0.1
Total	**420**	**100.0**	**6,788.4**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2018.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Percentages may not sum to 100 due to rounding.

Table 9 Size distribution of film exhibition companies, 2018

Turnover size band (£ million)	Number	%	Turnover (£ million)	% balance
≥5.0	10	3.7	1,465.4	90.7
1.0-4.99	50	18.5	98.9	6.1
0.5-0.99	35	13.0	24.8	1.5
0.25-0.49	35	13.0	12.1	0.7
0.1-0.24	70	25.9	10.2	0.6
0.05-0.09	35	13.0	2.7	0.2
<0.05	35	13.0	0.8	0.1
Total	**270**	**100.0**	**1,614.9**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2018.

Percentages may not sum to 100 due to rounding.

NATIONAL/REGIONAL DISTRIBUTION OF FILM COMPANIES IN THE UK

Tables 10 and 11 show the national/regional distribution of film companies and film company turnover in 2018. Overall, 70% of film companies were concentrated in London and the South East, and 79% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (61% of companies and 98.5% of turnover) but the exhibition sector was more widely spread across the UK, with 74% of companies and 42% of turnover associated with companies based outside London.

While London and the South East dominate in production and post-production, there are significant regional centres, particularly in the East of England, the South West and the North West.

Table 10 National/regional distribution of film companies, 2018

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
England	7,695	94.2	2,755	94.5	410	97.6	225	83.3	11,085	94.2
London	4,480	54.9	1,460	50.1	255	60.7	70	25.9	6,265	53.2
South East	1,325	16.2	550	18.9	65	15.5	40	14.8	1,980	16.8
East	595	7.3	225	7.7	25	6.0	25	9.3	870	7.4
South West	445	5.5	195	6.7	15	3.6	30	11.1	685	5.8
North West	260	3.2	115	3.9	15	3.6	20	7.4	410	3.5
Yorkshire and The Humber	215	2.6	65	2.2	10	2.4	15	5.6	305	2.6
West Midlands	170	2.1	70	2.4	15	3.6	10	3.7	265	2.3
East Midlands	135	1.7	55	1.9	5	1.2	10	3.7	205	1.7
North East	70	0.9	20	0.7	5	1.2	5	1.9	100	0.8
Scotland	210	2.6	80	2.7	5	1.2	20	7.4	315	2.7
Wales	175	2.1	55	1.9	5	1.2	15	5.6	250	2.1
Northern Ireland	85	1.0	25	0.9	0	–	10	3.7	120	1.0
UK	**8,165**	**100.0**	**2,915**	**100.0**	**420**	**100.0**	**270**	**100.0**	**11,770**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2018.

The overall total differs from that in Table 4 as it excludes figures for video production and distribution.

Count of companies is rounded to the nearest five for disclosure reasons.

Percentages may not sum to 100 due to rounding.

Table 11 National/regional distribution of film company turnover, 2018

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£m)	%	Turnover (£m)	%	Turnover (£m)	%	Turnover (£m)	%	Turnover (£m)	%
England	5,731	93.9	1,813	98.3	6,781	99.9	1,554	96.2	15,879	97.1
London	3,708	60.8	1,032	56.0	6,685	98.5	930	57.6	12,355	75.6
South East	445	7.3	124	6.7	22	0.3	14	0.9	605	3.7
East	1,221	20.0	c	c	40	0.6	c	c	c	c
South West	169	2.8	35	1.9	8	0.1	27	1.7	239	1.5
North West	54	0.9	c	c	4	c	c	c	505	3.1
Yorkshire and The Humber	72	1.2	12	0.6	c	c	9	0.6	c	c
West Midlands	32	0.5	10	0.5	c	c	3	0.2	c	c
East Midlands	21	0.3	7	0.4	c	c	144	8.9	c	c
North East	10	0.2	3	0.2	c	c	c	c	17	0.1
Scotland	102	1.7	11	0.6	c	c	c	c	c	c
Wales	73	1.2	16	0.9	1	<0.1	6	0.4	96	0.6
Northern Ireland	198	3.2	c	c	c	c	37	2.3	238	1.5
UK	**6,103**	**100.0**	**1,844**	**100.0**	**6,788**	**100.0**	**1,615**	**100.0**	**16,350**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

Notes:

Data as at March 2018.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

The geographic distribution of turnover is given by the location of the company, not its local units, so a London concentration may be overstated for companies such as cinema chains which have local units around the UK.

The overall total differs from that in Table 5 as it excludes figures for video production and distribution.

Percentages may not sum to 100 due to rounding.

LEADING FILM PRODUCTION COMPANIES IN THE UK

Drawing on the BFI Research and Statistics Unit's production database and public information, Table 12 lists the production companies involved in the greatest number of UK feature film projects between 2016 and 2018. Goldfinch Studios (a merger of Goldfinch Entertainment and GSP Studios) tops the list with 16 films followed by Working Title Films and Tornado Studios with 12 each.

The 12 films produced by Working Title had the highest combined budget at £427 million (equivalent to a mean budget per film of £36 million), while the five films produced by Proportion Productions had the lowest combined budget at £70,000 (equivalent to a mean budget per film of £14,000).

Table 12 Production companies involved in five or more UK productions, ranked by number of films, 2016-2018

Production company	Number of films	Estimated combined budget (£ million)	Selected titles
Goldfinch Studios	16	54	The Intergalactic Adventures of Max Cloud; Sometimes Always Never; Waiting for Anya
Working Title Films	12	427	Cats; The Kid Who Would Be King; Yesterday
Tornado Studios	12	19	The Cleansing; Heart of Steel; The Rebels
Salon Pictures	9	7	Churchill; McQueen; The Spy Who Fell to Earth
Passion Pictures	7	12	Eric Clapton: Life in 12 Bars; Serengeti Rules; Whitney: Can I Be Me
North Bank Entertainment	7	0.2	The Legend of Halloween Jack; Jurassic Predator; The Revenge of Robert the Doll
Element Pictures	6	44	The Favourite; The Killing of a Sacred Deer; The Little Stranger
Tempo Productions	6	23	Driven; Military Wives; The Wife
The Bureau	6	12	Daphne; Lean on Pete; Only You
Open Palm Films	6	3	Benjamin; Pond Life; Undercliffe
Pulse Films	6	3	Kingdom of Us; Rudeboy: The Story of Trojan Records; XY Chelsea
Hopscotch Films	6	2	Arcadia; Make Me Up; Women Make Film: A New Road Movie Through Cinema
Potboiler Productions	5	70	Woman Walks Ahead; The Boy Who Harnessed the Wind; Yuli
Riverstone Pictures	5	48	Replicas; Show Dogs; Tell It to the Bees
The Fyzz Facility	5	33	47 Metres Down; A Private War; The Informer
Fred Films	5	33	Finding Your Feet; Fisherman's Friends; Patrick
Altitude Films	5	29	Horrible Histories: The Movie - Rotten Romans; Liam Gallagher: As It Was; SAS Red Notice
Reliance Entertainment/Motion Picture Capital	5	18	1921; Hampstead; The Titan
Revolution Films	5	13	Greed; The Trip to Spain; The Wedding Guest
Stigma Films	5	3	Days of the Bagnold Summer; Double Date; Kaleidoscope
Global Edge Mnemonics	5	0.3	An Edge U-Cated Guess; Adventures Beyond the Hemisphere; Beyond the Sphere of Reasonable Doubt
Greenway Entertainment	5	0.2	Borstal; The Doll Master; The Howling
Proportion Productions	5	<0.1	12 Deaths of Christmas; Fox Trap; Mandy the Doll

Source: BFI

Notes:

Companies ranked by number of films produced, then by estimated combined budget.

'Estimated combined budget' is the sum of the estimated budgets of all the films associated with the named company. It is not a measure of that company's contribution to the budget. Most films had a number of production companies associated with them and financing came from a variety of sources including National Lottery funding, UK film tax relief, equity investment, US studio investment, distributor minimum guarantees and television pre-sales.

The table includes companies associated with five or more films over the three-year period.

Glossary

Alternative content

See Event cinema

Animation television programme

Within this Yearbook, the animation television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief the production must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, and at least 51% of its total core expenditure must be on animation

Audiovisual and related services

Within the exports data provided by the Office for National Statistics, audiovisual and related services describe services and fees related to the production of motion pictures, radio and television programmes and musical recordings

BAFTA

British Academy of Film and Television Arts (www.bafta.org)

BARB

Broadcasters' Audience Research Board. The company that compiles audience figures for UK television (www.barb.co.uk)

BASE

British Association for Screen Entertainment, formerly the British Video Association. The trade body representing the interests of publishers and rights owners of pre-recorded home entertainment on digital and physical video (www.base.org.uk)

BBFC

British Board of Film Classification. Independent body responsible for classifying films and video. See Cinema film classification (www.bbfc.org.uk)

Blu-ray disc

An optical disc format that can store up to 50 Gb of data, almost six times the capacity of a dual layer DVD. It uses a short wavelength blue-violet laser to read and write information to disc

Box office

Total value of ticket sales for a film screened commercially at cinemas

Box office gross

Box office takings before deduction of Value Added Tax (VAT)

CAA

Cinema Advertising Association. The trade association for cinema advertising contractors operating in the UK and Republic of Ireland (www.cinemaadvertisingassociation.com)

Cash-in

A notification to an Examining Board that all units of a qualification (e.g. GCSE) have been completed and an overall grade should now be awarded

Children's television programme

Within this Yearbook, the children's television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief the production must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, at least 51% of its total core expenditure must be on live action, and its primary target audience will be under the age of 15

Cinema film classification

Age rating given to a film by the British Board of Film Classification for a theatrical or video release. Indicates the film's suitability for audiences according to their age

Community cinema (community exhibition)

Voluntary providers of films bringing a variety of programming, often non-mainstream, to local communities which may have limited access to commercial cinemas

Concession revenue

Revenue from sales of food, drinks and merchandise at cinemas

Co-production

A film made by companies from more than one country, often under the terms of a bilateral co-production treaty or the European Convention on Cinematographic Co-production

Country of origin

The nationality of a film. In the case of co-productions, this may include more than one country

Creative Europe

The European Commission's framework programme for support to the culture and audiovisual sectors. It replaced the Culture and MEDIA programmes which ran from 2007-2013

DCMS

Department for Digital, Culture, Media and Sport. Government department responsible for setting UK film policy and for administering the National Lottery Distribution Fund (www.culture.gov.uk)

Digital projection

The projection of a film onto a cinema screen using a digital master and a digital projector, i.e. using electronic signals to direct light onto the screen rather than passing light through a celluloid strip

Digital video

A term used by the BFI Research and Statistics Unit to describe Video on Demand (VoD), a system that allows users to stream or download a film from a digital platform to view on a television set, PC or mobile device. See Video on Demand

Distributor

A person or company that acquires the right to exploit the commercial and creative values of a film in the theatrical, video and television markets. Also undertakes the promotional and marketing activities to attract audiences to a film

Domestic box office

Typically refers to the USA and Canada box office and revenue from the films given theatrical release in this territory. See Local box office

Domestic UK feature

A domestic (indigenous) UK feature is a film made by a UK production company that is produced wholly or partly in the UK, where the majority of the film's budget is from UK sources

Download to Own (DTO)

A type of Video on Demand business model which allows users to purchase permanent film downloads for storage on a hard drive, and in some cases to burn an additional copy to DVD. Also known as Electronic Sell Through (EST)

Download to Rent (DTR)

A type of Video on Demand business model which allows users to download content to view within a limited time period (often up to 48 hours following the first play)

DVD – Digital versatile disc

A digital optimal disc storage format capable of being viewed on different types of players

EEA spend

The value of all production expenditure, from pre-production to completion, on activity incurred in the European Economic Area

Electronic Sell Through (EST)

See Download to Own (DTO)

English Regions

Formerly known as Government Office Regions (GORs) they were an administrative classification used to establish the boundaries of the Regional Development Agencies and the Regional Screen Agencies. In 2011 the administrative function of GORs was abolished but the areas were kept for statistical purposes and are now known just as 'Regions'

Event cinema

Also known as 'alternative content'. Non-feature film programming in cinemas, such as the live screening of events or performances happening elsewhere. Event cinema has become a regular feature of some UK cinemas in recent years, and has been made possible by the availability of digital projection

Exhibitor

A cinema operator that rents a film from a distributor to show to a cinema audience. See Film rental

Feature film

A film made for cinema release, rather than a film made for television, and usually of at least 80 minutes duration

Film download

A digital version of a film transferred (either officially or unofficially) from the internet to a personal computer or mobile device. Downloads may also go directly to television sets via games consoles, internet protocol television or dedicated set-top boxes

Film rental

The sum of money paid to the distributor by the exhibitor in return for the right to show a particular film. Usually calculated as a percentage of net box office

Film tax relief

Tax relief on film production costs available for British qualifying films. To access the relief a film must qualify as British under the relevant cultural test or as an official co-production, with the intention of being released for theatrical exhibition

Franchise

A film series such as *Harry Potter and the Philosopher's Stone* and its sequels

GCE – General Certificate of Education

A subject specific academic qualification comprising Advanced Level (A Level) and Advanced Subsidiary Level (AS Level) available principally in England, Wales and Northern Ireland (Scottish equivalent is the Higher qualification)

GCSE – General Certificate of Secondary Education

A subject specific academic qualification awarded, generally taken by students aged 14-16 in secondary education in England, Wales and Northern Ireland (Scottish equivalent is the National qualification)

GDP – Gross Domestic Product

A measure of a country's income and output. GDP is defined as the total market value of all final goods and services produced within the country in a given period of time. GDP is also the sum of the value added at each stage of the production process. 'Gross' refers to the fact that GDP includes capital investment but does not subtract depreciation

Genre

A style or category of film defined on the basis of common story and cinematic conventions (e.g. action, crime, drama, etc)

Global box office

See worldwide box office

Grant-in-aid

A payment by a public sector funder (normally a central government department) to finance all or part of the costs of the body in receipt of the grant-in-aid. Grant-in-aid is paid where the government has decided, subject to parliamentary controls, that the recipient body should operate at arm's length

GVA – Gross Value Added

The amount that individual businesses, industries or sectors contribute to the economy. Broadly, this is measured by the income generated by the business, industry or sector less their intermediate consumption of goods and services used in order to produce their output. GVA consists of labour costs (e.g. wages and salaries) and an operating surplus (or loss). The latter is a good approximation to profits. The cost of capital investment, financial charges and dividends to shareholders are met from the operating surplus

High-end television (HETV) programme

Within this Yearbook, the high-end television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief a production 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 HETV programmes must be greater than 30 minutes)

Higher (Scottish)

In Scotland, the Higher is one of the national school-leaving certificate exams and university entrance qualifications of the Scottish Qualifications Certificate offered by the Scottish Qualifications Authority

HMRC

Her Majesty's Revenue and Customs. The government department charged with collecting revenue on behalf of the Crown

HMT

Her Majesty's Treasury. The government department responsible for formulating and implementing the Government's financial and economic policy

Independent film

A film produced without creative or financial input from the major US studio companies. These are: Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Intellectual property

Within the exports data provided by the Office for National Statistics, intellectual property includes trade-marks, franchises, brands and design rights; copyrighted works, sound recordings, films, television programmes; and royalties

Intermediate (Scottish)

In Scotland, the Intermediate was one of the national secondary school certificate qualifications offered by the Scottish Qualifications Authority. These have been replaced by National Qualifications

Inward investment feature

A term used by the BFI Research and Statistics Unit to denote a feature film which is substantially financed and controlled from outside the UK and which is attracted to the UK by script requirements (e.g. locations) and/or the UK's filmmaking infrastructure and/or UK film tax relief

ISBA TV regions

System for classifying regions developed by the Incorporated Society of British Advertisers (ISBA) for use by the advertising industry (www.isba.org.uk)

Local box office

Typically describes a particular country or territory's box office and revenue from films given a theatrical release in that country or territory when referenced from the perspective of that country or territory. See Domestic box office

Mainstream programming

Category of films aimed at the general audience

Mbps

Megabits per second. A data transfer rate of one million bits per second

Mean

A statistical term for the average of a set of values, which is calculated by summing the values and then dividing by the count of the values

Median

A statistical term meaning the middle value in an ordered set of values. Half of the values fall below the median and half of the values fall above the median

Mixed-use venue

An arts venue which screens films on a part-time basis alongside other activities such as concerts and plays

Megaplex site

Defined by Dodona Research as a purpose-built cinema with 20 or more screens

Multiplex site

Defined by Dodona Research as a purpose-built cinema with five or more screens

Multi-channel television

Digital television programming carried by satellite, cable or Freeview delivery systems, in this case excluding the five main network channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5)

National Qualification (Scottish)

In Scotland, the National Qualification is one of the secondary school certificate exams offered by the Scottish Qualifications Authority. These have replaced Intermediate and Standard Grade certificate qualifications. National Qualifications are usually taken by learners in the senior phase of secondary school (S4 to S6) and learners in colleges, including adult learners

Net box office

Box office takings after deduction of VAT

Online DVD rental

Selecting and renting DVDs via a website for postal delivery

ONS

Office for National Statistics. Executive office of the UK Statistics Authority, responsible for the production of official statistics in the UK (www.ons.gov.uk)

Over the top (OTT)

Over the top describes streamed or downloaded media content delivered via the internet without the involvement of a multiple-system operator

Out of town cinema

Cinema located on the outskirts of a town, typically in a large shopping development

PAYE

Pay as you earn. A method of collecting income tax and national insurance where these are deducted at source by the employer and remitted to HMRC

Pay TV

A satellite or cable television system in which viewers pay a subscription to access television content including feature films

Physical video

Refers to the various physical formats on which video can be distributed, such as VHS, DVD, Blu-ray, etc

Post-production

All stages of film production occurring after the shooting of raw footage. These typically include: editing the picture, adding the soundtrack, adding visual special effects and sound effects and preparing a final cut

Principal photography

The phase of film production in which the movie is filmed, with actors on set and cameras rolling, as distinct from pre-production and post-production

Pre-production

All stages of film production occurring once a film has been greenlit and before the shooting of raw footage. This typically includes: recruitment of crew, location scouting, set construction and scheduling

Producer

A film producer oversees and delivers a film project to all relevant parties while preserving the integrity, voice and vision of the film

Rental VoD

A type of Video on Demand business model which involves a one-off rental of an individual film title for a limited period of time, also known as Download to Rent (DTR).

Sites

Individual cinema premises

Smart TV

A television set or set-top box connected to the internet that uses internet digital protocols to communicate data

Social group / Social grade

A section of the population defined by class group and employment status, based on a classification used by the Market Research Society. The 'AB' social group refers to people in the Upper Middle and Middle class groups, in higher and intermediate managerial jobs. The 'C1' social group refers to people in in the Lower Middle class group, with supervisory or junior managerial jobs. The 'C2' social group refers to people in the Skilled Working class group, who are categorised as skilled manual workers. The 'DE' social group refers to those in the Working class group or those at the lowest level of subsistence, who are semi-skilled manual workers, in receipt of a state pension, in casual employment or the lowest grade jobs

Specialised films

Generally, non-mainstream films. This category includes foreign language and subtitled films, feature documentaries, 'arthouse' productions and films aimed at niche audiences

Standard Industrial Classification (SIC)

A system used by the Office for National Statistics to classify businesses according to the type of their economic activity

Statistically significant

A finding that is the result of a quantitative investigation or data analysis that is unlikely to be due to chance

Streaming

The transmission of audiovisual content that is constantly received by and presented to a user at the same time as it is being delivered by the provider. The client media player can start playing the data before the entire file has been transmitted

Studio-backed film

A film produced with creative and/or financial input from the major US studio companies. These are: Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Subscription VoD (SVoD)

A type of Video on Demand business model based on a subscription payment (usually monthly) in return for unlimited access to content

Terrestrial television

The five main free-to-air television channels: BBC One, BBC Two, ITV, Channel 4 and Channel 5

Traditional cinema

A cinema generally with fewer than five screens and that shows more mainstream product. Often an older building located in city centres or suburbs

Transactional VoD (TVoD)

A description of Video on Demand business models based on transactions of individual titles such as Download to Rent or Download to Own.

Turnover

The revenue that a company receives from its normal business activities during a period of time, usually from the sale of goods and services to customers

UK and Republic of Ireland

The distribution territory comprising the UK and Republic of Ireland. Where this publication indicates a film has been released 'in the UK and Republic of Ireland' it refers to the distribution territory and not necessarily to an actual release in both countries

UK film

A film which is certified as such by the UK Secretary of State for Digital, Culture, Media and Sport under Schedule 1 of the Films Act 1985, either via the cultural test for film or under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production; or a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent; or (in the case of a re-release) a film which met the official definition of a British film prevailing at the time it was made or was generally considered to be British at that time

UK spend

The value of production expenditure, from pre-production through to completion, on activity incurred in the UK for films and programmes applying for one of the creative sector tax reliefs as a UK qualifying production under the relevant cultural test. For films and programmes qualifying as British under one of the UK's bi-lateral treaties or the European Convention on Cinematographic Co-production, the UK spend includes all production costs incurred by the UK film production company

US studio

See studio-backed film

VFX

Visual effects. The various processes by which imagery is created and/or manipulated outside of live action material

Video game

Within this Yearbook, the video games referred to are those which have accessed or intend to access the relevant UK creative industry tax relief; they are defined by HMRC as electronic games intended to be played through a video device. To access the relief a video game must qualify as British under the video games cultural test

Video on Demand (VoD)

A system that allows users to select and watch films (or other content) on a television set, PC or mobile device at the time they want over an interactive network. See Digital video

Virtual Print Fee (VPF)

The commercial joint funding model designed to help film exhibitors purchase digital cinema equipment. The VPF is a contribution towards exhibitors' costs of digital cinema equipment, paid by distributors. This is based on the assumption that distributors will benefit from cost savings associated with using digital print distribution instead of analogue film print distribution

Worldwide box office

Refers to the box office across all global territories and total global box office revenues. Within the Yearbook, worldwide box office is used interchangeably with global box office

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European Audiovisual Observatory (EAO)
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Written by:
Ian Cade
Julia Lamaison
Paul McEvoy
John Sandow

Additional material:
Grace Bridger
Chris Chandler
Simon Fathers
Chris Halliday
Yvonne Harris
Anna Mansi
Sean Perkins
Stephanie Redstone
Jen Sobel
Angela Topping

Editor:
John Murray

Design:
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