Film Forever

SCREEN SECTOR PRODUCTION IN 2015

Image: *A United Kingdom* courtesy of Pathé UK

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SCREEN SECTOR PRODUCTION IN 2015

The value of feature film production spend in the UK in 2015 was £1.4 billion, 83% of which was associated with inward investment features. The UK production spend of qualifying high-end television and animation programmes was £788 million, while the UK spend of qualifying video games was £59.5 million.

FACTS IN FOCUS

- Total UK film production activity in 2015 was £1,410 million, down 6% from £1,497 million in 2014, but still the second highest total since records began.
- There were 124 domestic UK features (224 in 2014), 30 co-productions (37 in 2014) and 47 inward investment features (49 in 2014).
- The UK spend associated with inward investment features was £1,177 million, down 6% from £1,247 million in 2014.
- Fifteen big budget films (£30 million or over) accounted for 73% of the total UK film production spend.
- The UK spend associated with domestic high-end television (HETV) programmes was £380 million, just over half (50.1%) of the total UK HETV production spend.
- The UK spend of qualifying animation programmes was £29 million, while video games production generated a UK spend of £59.5 million.

THE VALUE OF UK FILM PRODUCTION

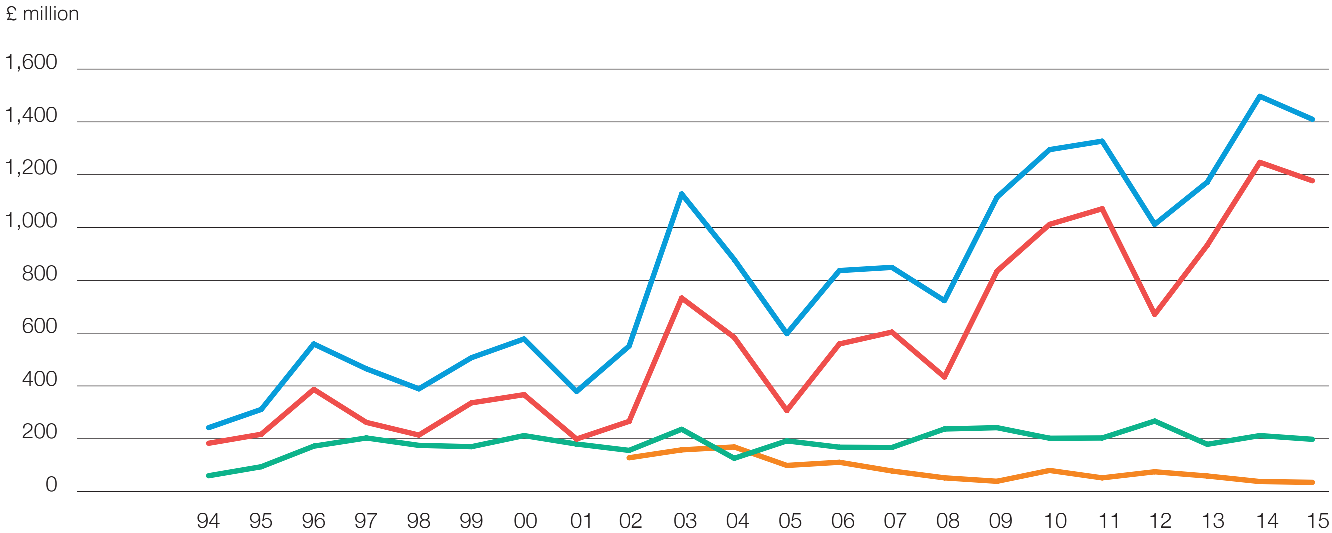
As Figure 1 shows, the aggregate UK spend of features that commenced principal photography in 2015 was £1,410 million, a slight decrease on 2014's record-breaking total of £1,497 million, but still the second highest figure since our records began. The high totals of these two years coincides with the extended tax relief introduced by the UK government in 2014.

Inward investment films contributed £1,177 million towards the total UK film production spend in 2015, a decrease of 6% from £1,247 million in 2014. However, the proportion of UK spend attributed to inward features was the same in both years, at 83%. Some of the big budget films contributing to this figure were *Rogue One: A Star Wars Story*, *Fantastic Beasts and Where to Find Them*, *Assassin's Creed* and *Pirates of the Caribbean: Dead Men Tell No Tales*.

Domestic UK features, including *A United Kingdom*, *The Girl with All the Gifts* and *Florence Foster Jenkins* spent £198 million in the UK, down £14 million (7%) from 2014. The UK spend of official and unofficial co-productions was £35 million, down from £38 million in 2014. Co-productions commencing principal photography in the year included *The Danish Girl*, *I, Daniel Blake* and *The Receptionist*.

Figure 1 also shows that since 1994, both the growth and annual variation in the total value of UK spend has principally been driven by inward investment and how it fluctuates from year to year. The UK spend of domestic UK films has been broadly stable over this period, with an average of around £200 million per year, while there has been a decline in the UK spend of co-productions following changes to the UK film tax relief in 2007.

Figure 1 UK spend of feature films produced in the UK, 1994-2015, £ million



	94	95	96	97	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15
Inward investment	183	217	387	262	214	336	367	199	266	733	584	307	559	604	434	835	1,012	1,071	671	933	1,247	1,177
Domestic UK	60	94	172	203	175	170	212	180	156	236	126	192	168	167	237	242	202	203	267	179	212	198
Co-production	-	-	-	-	-	-	-	-	128	158	169	99	111	78	52	39	80	52	75	59	38	35
Total	**242**	**311**	**559**	**465**	**389**	**507**	**578**	**379**	**551**	**1,127**	**879**	**598**	**837**	**849**	**723**	**1,115**	**1,295**	**1,327**	**1,012**	**1,172**	**1,497**	**1,410**

Source: BFI
Notes:
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
Films are allocated to the calendar year in which principal photography commenced.
Films with budgets under £500,000 are included in this analysis after 2008.
Numbers have been revised on the basis of new information received since publication of the 2015 Statistical Yearbook.
Inward investment feature films include inward co-productions and VFX-only films.

Measurement:
The above numbers 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.

Table 1 distinguishes UK independent films from UK/USA studio films and non-UK films made partly or wholly in the UK. In 2015, UK independent films accounted for 22% of the production spend in the UK, a fall from 33% in 2014.

Table 1 Value of UK spend of UK/USA studio and UK independent films, 2006-2015, £ million

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
UK/USA studio films	588	566	407	772	983	1,007	667	778	1,003	889
UK independent films	234	265	292	296	289	279	326	390	491	308
Non-UK films	15	18	24	48	22	41	19	4	3	213
Total	**837**	**849**	**723**	**1,115**	**1,295**	**1,327**	**1,012**	**1,172**	**1,497**	**1,410**

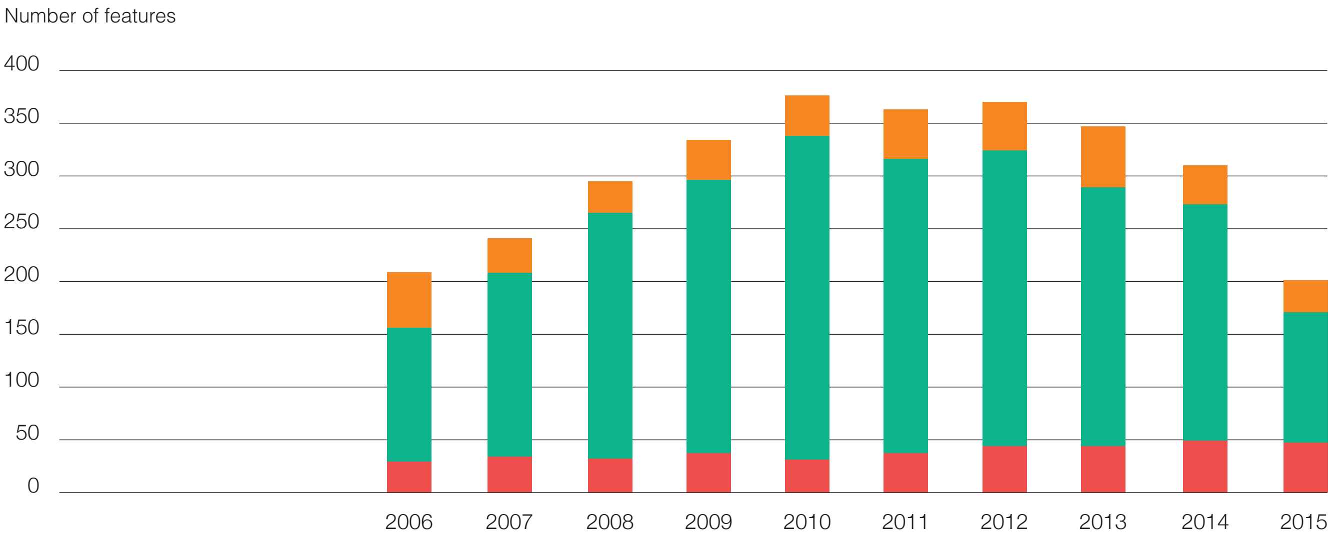
Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
See notes to Figure 1.

THE VOLUME OF UK FILM PRODUCTION

As Figure 2 shows, the number of films produced in the UK grew from 209 in 2006 to a peak of 376 in 2010. From 2008 onwards, the data collected include feature films with budgets of less than £500,000 which partially explains the increase. (Prior to 2008 the collection of data on films at this budget level was not comprehensive.) The number of co-productions fell from 2007, reflecting a tightening in co-production certification requirements, followed by the introduction of the new film production tax relief based on a film's UK spend rather than the entirety of the production budget. Minority co-productions saw the greatest reduction.

In 2015, 201 films were produced wholly or in part in the UK, down from 310 in 2014. Of these, 30 were co-productions, 124 were domestic UK features (of which 64 had budgets of under £500,000) and 47 were inward investment films. The biggest fall was in domestic UK features with budgets of under £500,000, which were down from 147 in 2014. However, there is often a delay in acquiring full data on low and micro-budget feature film activity in the UK, and the numbers for the last two years are likely to be revised upwards.

Figure 2 Number of feature films produced in the UK, 2006-2015



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Inward investment	29	34	32	37	31	37	44	44	49	47
Domestic UK	127	174	233	259	307	279	280	245	224	124
Of which budget ≥ £500,000	*55*	*69*	*81*	*86*	*72*	*88*	*76*	*67*	*77*	*60*
Of which budget < £500,000	*72*	*105*	*152*	*173*	*235*	*191*	*204*	*178*	*147*	*64*
Co-production	53	33	30	38	38	47	46	58	37	30
Of which majority and parity co-production	*15*	*15*	*14*	*13*	*25*	*24*	*24*	*32*	*17*	*15*
Of which minority co-production	*38*	*18*	*16*	*25*	*13*	*23*	*22*	*26*	*20*	*15*
Total	**209**	**241**	**295**	**334**	**376**	**363**	**370**	**347**	**310**	**201**

Source: BFI RSU

Notes:

Inward investment includes inward investment co-productions and, from 2007, a small number of visual effects (VFX) only titles.

Data for 2006-2014 updated since publication of the 2015 Statistical Yearbook.

Includes both official and unofficial co-productions.

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.

A total of 17 UK/USA studio films were produced wholly or in part in the UK in 2015 (Table 2). These few films accounted for the majority of UK production spend. UK independent films made up almost 88% of all films produced in the UK, a decrease of five percentage points when compared to 2014. Although the number of independent films (176) looks lower than for other recent years, due to the delay in acquiring full data on low and micro-budget feature film activity, this figure is likely to be revised upwards over time.

Table 2 Numbers of UK/USA studio and independent films, 2006-2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
UK/USA studio films	21	17	13	14	16	13	16	17	18	17
UK independent films	181	212	266	295	352	331	345	324	287	176
Non-UK films	7	12	16	25	8	19	9	6	5	8
Total	**209**	**241**	**295**	**334**	**376**	**363**	**370**	**347**	**310**	**201**

Source: BFI
Note: Data for 2006-2014 updated since publication of the 2015 Statistical Yearbook.

FILM PRODUCTIONS BY GENRE, 2013-2015

Table 3 and Figure 3 show a breakdown of production by genre for the years 2013-2015. The drama and documentary genres accounted for the highest proportion of films, at 16% and 21% respectively, but only 9% and 1% of total UK spend. These were followed by comedy and thriller which each accounted for 14% of productions, and 8% and 7% of respective UK spend. The biggest spending genre was action, which accounted for 37% of the overall UK spend, but only 7% of films.

Table 3 Genre of film production in the UK, 2013-2015 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	63	7.3	2,608.8	39.6	1,494.7	36.6
Adventure	18	2.1	956.0	14.5	519.7	12.7
Drama	134	15.6	581.6	8.8	360.5	8.8
Fantasy	11	1.3	474.5	7.2	360.1	8.8
Comedy	117	13.6	435.1	6.6	327.3	8.0
Thriller	120	14.0	359.1	5.5	277.4	6.8
Sci-fi	21	2.4	251.0	3.8	166.8	4.1
Horror	69	8.0	178.0	2.7	141.9	3.5
Biopic	21	2.4	126.5	1.9	80.8	2.0
Romance	29	3.4	149.9	2.3	80.6	2.0
War	13	1.5	130.6	2.0	70.1	1.7
Documentary	183	21.3	82.8	1.3	53.5	1.3
Family	8	0.9	118.6	1.8	39.7	1.0
Crime	36	4.2	26.2	0.4	22.3	0.5
Mystery	5	0.6	12.9	0.2	9.4	0.2
Other	10	1.2	96.7	0.1	74.1	0.1
Total	**858**	**100.0**	**6,588.2**	**100.0**	**4,078.9**	**100.0**

Source: BFI
Notes:
The genre ‘Other’ includes ‘Animation’, ‘Musical’ and ‘Western’.
The data have been presented for a three-year period to show as many genres as possible without disclosing the budgets of individual films.
Figures/percentages may not sum to totals due to rounding.

Figure 3 Genre of UK film productions 2013-2015 (number of films)

Genre	%
Documentary	21.5
Drama	15.7
Thriller	14.2
Comedy	13.5
Horror	8.1
Action	7.4
Crime	4.3
Romance	3.2
Sci-fi	2.5
Biopic	2.4
Adventure	1.9
War	1.5
Fantasy	1.3
Other	2.5

Source: BFI
Notes:
The data differ from those in Table 3 as they do not include non-UK films.
The genre 'Other' includes 'Animation', 'Family', 'Musical', 'Mystery' and 'Western'.

Looking at the breakdown by genre of UK independent films alone over the three-year period (Table 4), the pattern was fairly similar. The main differences were that comedy, thriller, drama and biopic accounted for a much greater proportion of total UK spend than for all films produced in the UK (53% compared with 26%), and action and adventure accounted for a lower proportion (24% compared with 49%).

Table 4 Independent UK productions by genre 2013-2015 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	46	5.8	395.4	22.5	256.4	21.6
Comedy	108	13.7	292.5	16.6	237.6	20.0
Thriller	117	14.9	228.5	13.0	168.1	14.2
Drama	129	16.4	234.6	13.4	162.3	13.7
Biopic	19	2.4	94.6	5.4	63.9	5.4
Romance	25	3.2	87.7	5.0	52.0	4.4
Documentary	178	22.6	68.2	3.9	47.8	4.0
Horror	64	8.1	46.1	2.6	33.1	2.8
Sci-fi	19	2.4	32.5	1.9	25.9	2.2
Adventure	9	1.1	95.1	5.4	23.1	1.9
Crime	36	4.6	26.2	1.5	22.3	1.9
Fantasy	7	0.9	46.3	2.6	22.1	1.9
War	11	1.4	36.6	2.1	18.1	1.5
Other	19	2.4	72.8	4.1	55.5	4.7
Total	**787**	**100.0**	**1,757.1**	**100.0**	**1,188.1**	**100.0**

Source: BFI
Notes:
The genre 'Other' includes the genres 'Musical', 'Animation', 'Family' and 'Mystery'.
Figures/percentages may not sum to totals due to rounding.

BUDGET TRENDS

The median budget of domestic UK features in 2015 was £500,000, an increase from £260,000 in 2014 (Table 5). It should be noted that the 2015 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 £13.1 million, up from £12.6 million in 2014, while for co-productions the median budget decreased from £1.4 million to £1.3 million. Again, the figures for 2015 are likely to be revised.

Table 5 Median feature film budgets, £ million, 2009-2015

Production category	2009	2010	2011	2012	2013	2014	2015
Inward investment	18.45	13.09	17.64	1.58	11.24	12.61	13.10
Domestic UK	0.20	0.13	0.17	0.15	0.15	0.26	0.50
Co-production	1.35	2.56	1.10	1.05	1.01	1.40	1.27

Source: BFI
Notes:
Median budget is the middle value of budgets when ordered lowest to highest (ie 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 for 2010-2014 updated since publication of the 2015 Statistical Yearbook.
Data in this table are shown to two decimal places to gain a clearer picture of change over the time period for domestic UK films.

SIZE DISTRIBUTION OF BUDGETS

The budget size distribution for the three main categories of films made in 2015 is shown in Tables 6 to 8.

For inward investment features, the 14 films with budgets of £30 million or over (30% of all inward features) accounted for 85% of the total budget for this category (Table 6). There were 15 inward features with budgets of less than £5 million (32% of inward features), which accounted for 2% of the total budget for these films.

Table 6 Size distribution of budgets, inward investment features, 2015

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£30 million	14	1,689.2	85.4
£10 - £29.9 million	12	208.8	10.6
£5 - £9.9 million	6	42.4	2.1
<£5 million	15	37.7	1.9
Total	**47**	**1,978.2**	**100.0**

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

Over half of domestic UK features (64) had budgets of under £500,000, and only 14 productions (11% of domestic UK projects) had budgets of £5 million or over (Table 7). The domestic UK features in the highest budget band accounted for 59% of this category's aggregate budget, while those in the lowest budget band accounted for 6%. These figures show no substantial change on 2014.

Table 7 Size distribution of budgets, domestic UK features, 2015

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	14	133.4	58.9
£2 - £4.9 million	17	51.0	22.5
£0.5 - £1.9 million	29	28.4	12.5
<£0.5 million	64	13.7	6.1
Total	**124**	**226.5**	**100.0**

Source: BFI

Seven of the 30 co-productions produced in the UK in 2015 had budgets of £5 million or over, accounting for 69% of the total budget in this category (Table 8). The nine co-productions with budgets of under £500,000 accounted for 3% of the total budget.

Table 8 Size distribution of budgets, co-productions, 2015

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	7	61.7	68.7
£2 - £4.9 million	5	16.4	18.3
£0.5 - £1.9 million	9	9.2	10.2
<£0.5 million	9	2.5	2.8
Total	**30**	**89.8**	**100.0**

Source: BFI

BIG BUDGET PRODUCTIONS, 2009-2015

The importance to UK spend of a small number of big budget productions – usually inward investment films – is demonstrated in Table 9. In 2015, the 15 films with budgets of £30 million or over accounted for 73% of UK production spend, the same as in 2014. All except one of these films were inward investment features.

Table 9 Big budget films' contribution to UK spend, 2009-2015

	2009	2010	2011	2012	2013	2014	2015
Number of films with budgets ≥£30 million	16	13	17	9	16	18	15
Value of associated UK spend (£ million)	748.9	960.6	1,009.8	631.9	824.7	1,099.5	1,035.6
Total UK spend (£ million)	1,115.4	1,294.7	1,326.8	1,012.3	1,171.5	1,497.4	1,410.1
Big budget film % of UK spend	**67.1**	**74.2**	**76.1**	**62.4**	**70.4**	**73.4**	**73.4**

Source: BFI
Note: Data for 2010-2014 updated since publication of the 2015 Statistical Yearbook.

UK SPEND AS PERCENTAGE OF TOTAL PRODUCTION BUDGET

Table 10 shows UK spend as a percentage of the total production budget for inward investment, domestic UK and co-production films. UK domestic films had the highest proportion of UK spend in 2015 (87%), followed by inward investment films at 60%. Co-productions had the lowest percentage of UK spend (39%).

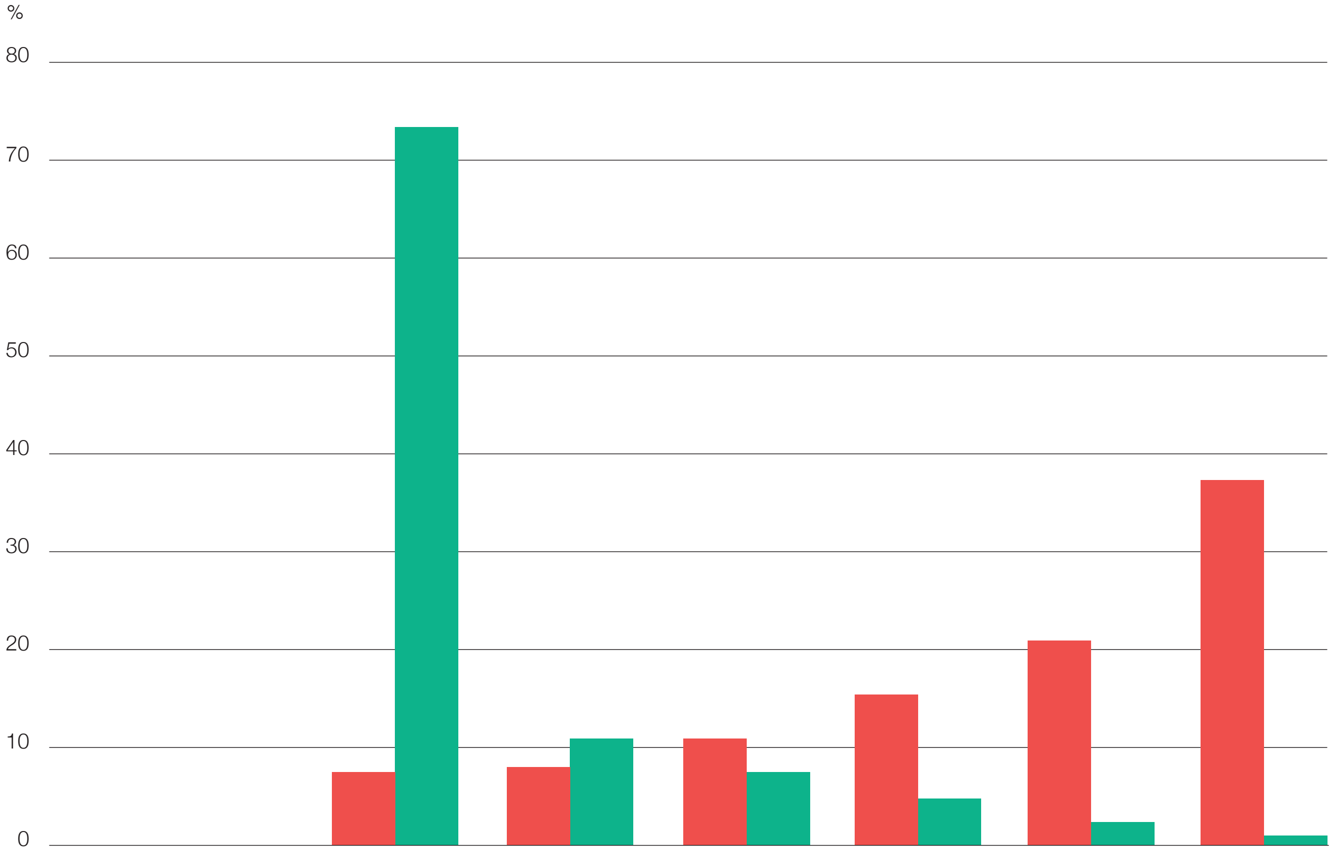
Table 10 UK spend as percentage of total production budget, 2009-2015

Production category	2009	2010	2011	2012	2013	2014	2015
Inward investment	50.9	71.7	55.9	70.3	67.1	57.0	59.5
Domestic UK	81.4	89.9	86.6	88.9	86.7	78.6	87.4
Co-production	37.2	42.1	36.0	46.0	43.8	37.4	39.2

Source: BFI
Note: Data for 2010-2014 updated since publication of the 2015 Statistical Yearbook.

Figure 4 underlines that a small proportion (8%) of titles with a UK spend of £30 million or over are responsible for the majority (73%) of UK production spend. Conversely, 37% of films have a UK spend of less than £500,000, but they represent just 1% of production investment in the UK.

Figure 4 Percentage of productions and UK spend by category of UK spend, 2015



	≥£30 million	£10 - £29.9 million	£5 - £9.9 million	£2 - £4.9 million	£0.5 - £1.9 million	<£0.5 million
% of productions	7.5	8.0	10.9	15.4	20.9	37.3
% of UK spend	73.4	10.9	7.5	4.8	2.4	1.0

Source: BFI

DOMESTIC UK PRODUCTIONS BY TERRITORY OF SHOOT

Table 11 analyses domestic UK productions in 2015 according to whether they were wholly shot in the UK, or shot partly or wholly abroad. The majority (82 out of 124) were shot exclusively in the UK, while 42 films were shot partly or wholly outside the UK. The non-UK spend of domestic productions in 2015 as a proportion of their total budget was 13%.

Table 11 Domestic UK productions by territory of shoot, 2015

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	82	143.5	1.1	0.8
UK and other / wholly outside the UK	42	83.0	27.5	33.1
Total domestic UK productions	**124**	**226.5**	**28.6**	**12.6**

Source: BFI

Table 12 shows the number of shoots by territory for domestic UK films in 2015. Because some films were shot in two or more territories, the total number of shoots is greater than the total number of films. There were 13 shoots in the USA, five in France, four in Spain and three in Republic of Ireland.

Table 12 Domestic UK productions, shoots by territory or region, 2015

Territory of shoot	Number of shoots
UK	113
USA	13
France	5
Spain	4
Republic of Ireland	3
Germany	2
Other	30
Total	**170**

Source: BFI

CO-PRODUCTIONS BY TERRITORY OF SHOOT

In contrast to domestic UK films, co-productions beginning principal photography in 2015 were usually shot partly or wholly abroad, as Table 13 shows; only five out of 30 films were shot wholly in the UK.

Table 13 Co-productions by territory of shoot, 2015

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	5	6.8	1.3	19.6
UK and other	11	33.6	14.8	43.9
Wholly outside the UK	14	49.3	38.5	78.0
Total co-productions	**30**	**89.8**	**54.6**	**60.8**

Source: BFI
Notes:
Includes both official and unofficial co-productions.
Figures/percentages may not sum to totals due to rounding.

The country distribution of co-production shoots is shown in Table 14. As most co-productions were shot in two or more territories, the total number of shoots was greater than the total number of films. The majority of shoots were in the UK or elsewhere in Europe. Three shoots took place in the USA, and there were two each in Germany, Republic of Ireland, the Occupied Palestinian Territories and Romania.

Table 14 Co-productions, shoots by territory or region, 2015

UK	16
USA	3
Germany	2
Republic of Ireland	2
Occupied Palestinian Territories	2
Romania	2
Other Europe	13
Other	13
Total	**53**

Source: BFI

PRODUCTION COMPANY ACTIVITY LEVELS

UK film production in 2015 was dispersed among a large number of production companies, as shown in Table 15. The BFI Research and Statistics Unit recorded 368 production companies associated with films shot in the UK or co-productions involving the UK in the year, a decrease from 391 in 2014. Of these, 347 (94%) were associated with a single feature. These were a mixture of distinct production companies and special purpose vehicles set up to make a single film.

Table 15 Film production company activity, 2015

Number of features per company	Number of companies
3	4
2	17
1	347
Total	**368**

Source: BFI RSU
Note: Includes all production categories.

THE VALUE OF HIGH-END TELEVISION PRODUCTION

Table 16 shows that the total UK production spend for UK qualifiying high-end television (HETV) programmes in 2015 was £759 million. Co-productions and inward investment projects contributed £379 million, an increase from £302 million in 2014, while domestic UK HETV productions contributed £380 milllion, up from £331 million in 2014. Domestic HETV projects were responsible for just over half the HETV UK production spend in 2015, in contrast with feature film where the majority (83%) of UK production spend was associated with inward investment projects.

Domestic HETV productions shooting in the UK in 2015 included *Call the Midwife – Series 5* (8 episodes, plus Christmas special), *Dickensian* (20 episodes) and *Shetland – Series 3* (6 episodes), inward investment productions included *Game of Thrones – Season 6* (10 episodes), *Outlander – Season 2* (13 episodes) and *Galavant – Season 2* (10 episodes), while co-productions included *Downton Abbey – Series 6* (8 episodes), *The Night Manager* (6 episodes) and *War and Peace* (6 episodes).

Table 16 UK spend and number of HETV productions* produced in the UK, 2014 and 2015

	2014		2014	
	UK spend (£ million)	Number	UK spend (£ million)	Number
Co-production and inward investment	302.4	30	378.6	25
Domestic UK	330.9	63	380.2	57
Total	**633.2**	**93**	**758.8**	**82**

Source: BFI
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
Productions are allocated to the year principal photography commenced.
Data for 2014 updated since publication of the 2015 Statistical Yearbook.
* An HETV production can be a single programme or a television series.

GENRE OF HIGH-END TELEVISION PRODUCTIONS

Table 17 shows a breakdown of qualifying HETV productions by genre. The most common genre was drama, accounting for 25 productions (31% of the total) and £265 million (35%) of UK spend. The second was crime, accounting for 21 productions and 18% of the total UK spend.

Table 17 Genre of qualifying HETV productions*, 2015

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	25	30.5	302.1	35.0	265.0	34.9
Crime	21	25.6	157.1	18.2	138.5	18.3
Comedy	14	17.1	117.9	13.7	93.5	12.3
Thriller	5	6.1	37.9	4.4	37.9	5.0
Other	17	20.7	247.6	28.7	223.7	29.5
Total	**82**	**100.0**	**862.6**	**100.0**	**758.8**	**100.0**

Source: BFI
Notes:
The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.
Figures may not sum to totals due to rounding.
* An HETV production can be a single programme or a television series.

THE VALUE OF ANIMATION PRODUCTION

Table 18 shows that the total UK spend of the 18 qualifying animation programmes produced in the UK in 2015 was £29 million. UK spend on domestic UK productions accounted for 36% of the total spend.

Table 18 UK spend and number of animation programmes* produced in the UK, 2015

Production category	UK spend (£ million)	Number of productions
Co-production and inward investment	18.7	10
Domestic UK	10.5	8
Total	**29.2**	**18**

Source: BFI
Notes:
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
* An animation production can be a single programme or a television series.

THE VALUE OF VIDEO GAMES PRODUCTION

In April 2014, the UK government extended the coverage of creative sector tax reliefs to include video games production. In 2015, the total UK spend of the 25 qualifying video games produced in the UK was £59.5 million. More comprehensive data covering video games production will be available in future editions of the Yearbook.

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