BFI
Film Forever

SCREEN SECTOR CERTIFICATION AND PRODUCTION

CONTENTS

Image: *Stockholm, My Love* courtesy of BFI Distribution

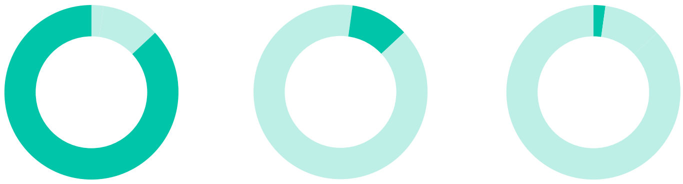
FACTS IN FOCUS

FEATURE FILM PRODUCTION ACTIVITY IN THE UK IN 2017

73 inward investment films

174 UK domestic films

18 co-productions



UK spend **£1.8 billion**

UK spend **£221 million**

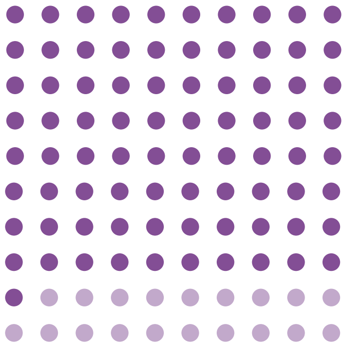
UK spend **£31 million**

TOTAL UK SPEND OF FEATURE FILMS IN 2017

£2 billion

a record high – up 17% on 2016

BIG BUDGET FEATURES

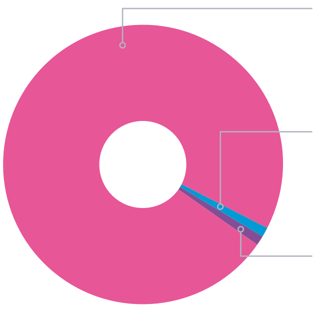


29 big budget features (£30 million or over) accounted for **81%** of total UK film production spend

FILM PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

2017	2016
294 film projects **£2.7 billion** (estimated total budget)	**276** film projects **£1.6 billion** (estimated total budget)

PRODUCTION VALUE OF UK QUALIFYING TELEVISION PROGRAMMES IN 2017



97 high-end television projects; **UK spend £985 million**

28 animation television projects; **UK spend £62 million**

18 children's television projects; **UK spend £55 million**

TELEVISION PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

£1 billion estimated budget

Up 4% on 2016

209 television projects received final certification as officially British in 2017, **up from 157 in 2016**

PRODUCTION VALUE OF UK QUALIFYING VIDEO GAMES IN 2017

41 video game projects;

£132 million

UK SPEND

VIDEO GAME PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

2017: **212** video games **£278** million (estimated total budget)

2016: **189** video games **£225** million (estimated total budget)

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 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 2017, including *Assassin's Creed, Breathe* and *Three Billboards Outside Ebbing, Missouri.*

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 2017, 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. Films which received final co-production certification in 2017 included *Dough, Message from the King* and *Stockholm, My Love.*

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 2017, these were with Australia, Canada, China, Israel, New Zealand, the Occupied Palestinian Territories and South Africa.

HETV productions receiving final certification in 2017 included *The Child in Time* (single drama), Stan Lee's *Lucky Man* – Series 2 (10 episodes) and *The White Princess* (8 episodes). Animation and children's television productions qualifying as officially British in the year included *Rank the Prank* (13 episodes), *Revolting Rhymes* (2 episodes) and *Y Gemau Gwyllt* (8 episodes).

VIDEO GAMES

In 2014, the UK government extended creative sector tax reliefs to include video games development. As with the other screen sector reliefs, 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.

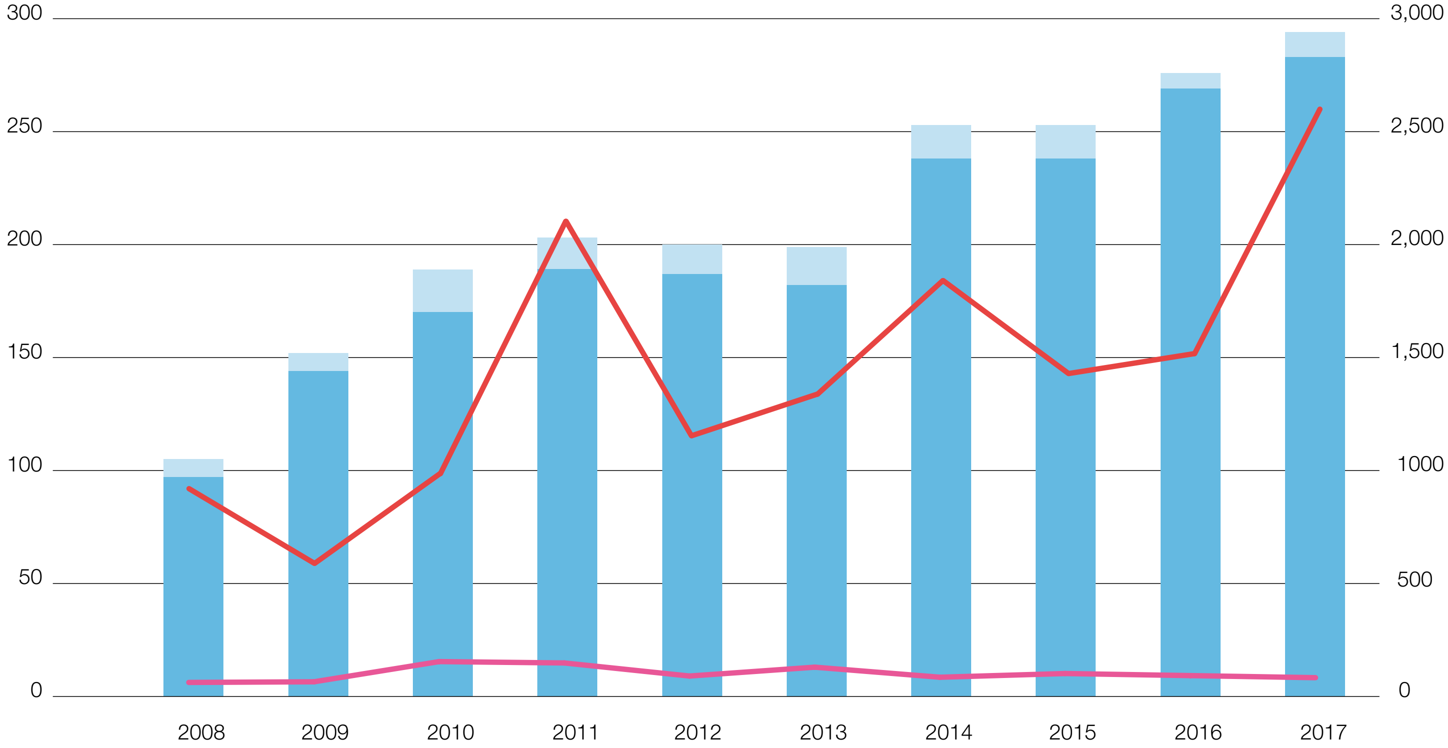
Video games awarded final certification in 2017 included *Hellblade: Senua's Sacrifice, LEGO Star Wars – the Force Awakens* and *Sea Hero Quest.*

FILMS WITH FINAL CERTIFICATION, 2008-2017

Due in part to a competitive tax regime, the number of UK films receiving final certification has risen sharply over the 10-year period, 2008-2017. As Figure 1 shows, the number of finally certified films in 2017 (294) was almost three times larger than in 2008 (105). There has also been a strong upward trend in the overall production budget associated with these films, which has risen from £980 million in 2008 to £2.7 billion in 2017. This increase, particularly in the last few years, is due primarily to a rise in the numbers of very high budget UK studio-backed films that have been based in the UK. (UK studio-backed films are wholly or partly financed and controlled by US studios but which feature UK cast, crew, locations, facilities, post-production and often UK source material.)

The numbers and overall budgets of co-productions with final certification have remained low throughout the period. (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 have been awarded final certification in any given year over the course of the period.

Figure 1 Number and production budget of films with final certification, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of final certifications										
Cultural test	97	144	170	189	187	182	238	238	269	283
Co-production	8	8	19	14	13	17	15	15	7	11
Total	**105**	**152**	**189**	**203**	**200**	**199**	**253**	**253**	**276**	**294**
Production budget (£ million)										
Cultural test	935.1	604.8	1,001.7	2,118.3	1,169.7	1,353.3	1,855.9	1,444.9	1,532.7	2,614.7
Co-production	45.2	48.0	137.4	131.4	73.5	112.7	68.2	84.6	75.4	66.2
Total	**980.3**	**652.8**	**1,139.1**	**2,249.7**	**1,243.2**	**1,466.0**	**1,924.2**	**1,529.5**	**1,608.1**	**2,680.9**

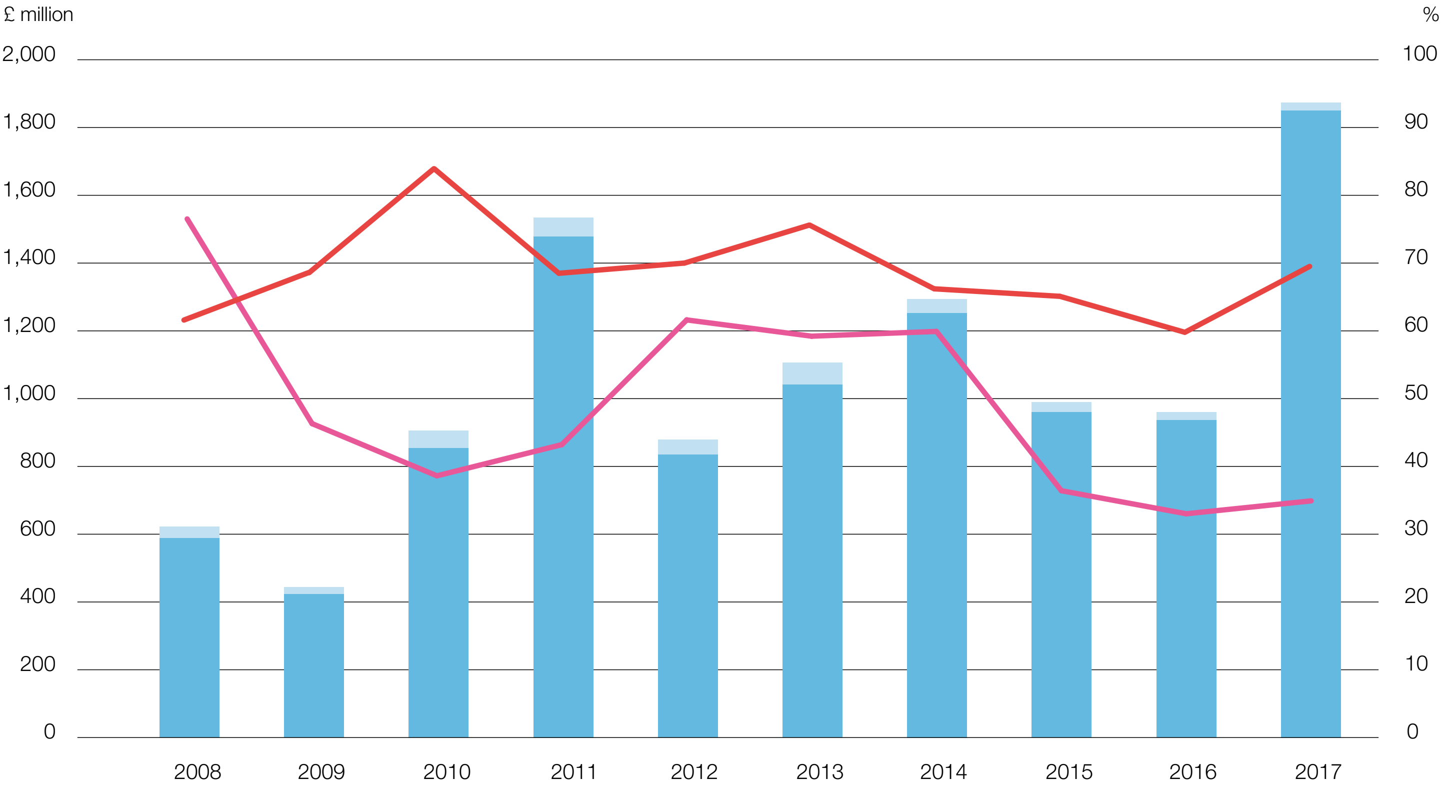
Source: DCMS, BFI

Note: 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.

Figure 2 shows the levels of UK spend[1] associated with films receiving final certification between 2008 and 2017. Although the latest cultural test amendments allow wider EEA 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.

There has been a general upward trend in the overall level of UK spend, peaking in 2017 at £1.8 billion. While the aggregate UK spend of co-productions has always been less than that of cultural test films, there has been an overall downward trend in UK production value for films in this category over the period. In 2017, cultural test films accounted for 99% of the overall UK spend of films with final certification, compared with 95% in 2008.

Figure 2 UK spend of films with final certification and UK spend as % of total budget, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK spend										
Cultural test	588.5	422.9	853.8	1,478.5	834.2	1,041.2	1,252.8	959.9	936.3	1,850.3
Co-production	34.0	21.6	51.3	55.0	44.3	65.3	40.0	29.7	23.9	22.2
Total	**622.5**	**444.6**	**905.1**	**1,533.5**	**878.5**	**1,106.5**	**1,292.8**	**989.6**	**960.2**	**1,872.5**
UK spend as % of total production budget										
Cultural test	62.9	69.9	85.2	69.8	71.3	76.9	67.5	66.4	61.1	70.8
Co-production	75.2	45.0	37.3	41.9	60.3	57.9	58.6	35.1	31.7	33.6

Source: DCMS, BFI
See note to Figure 1.

[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.

BUDGET DISTRIBUTION OF FILMS WITH FINAL CERTIFICATION, 2008-2017

Figure 3 shows the median budgets of films receiving final certification between 2008 and 2017. For the first two years of the period, the median budget for cultural test films was £1 million. Since then, as the number of these films has increased, the median budget has fallen steeply, plateauing at £300,000-£500,000 from 2010. 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. The peak is likely to be due to the very low numbers of films certified in that year, because with low numbers the median is more susceptible to the effects of individual budgets. In 2017, the median budget for co-productions was £5.7 million, the second highest figure of the period.

Figure 3 Median budgets of films with final certification, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Cultural test	1.0	1.0	0.4	0.5	0.4	0.4	0.4	0.4	0.3	0.3
Co-production	3.8	6.3	4.4	3.8	2.8	3.7	4.0	3.8	4.8	5.7

Source: BFI

Notes:

The median is the middle value, ie there are equal numbers of films above and below the median.

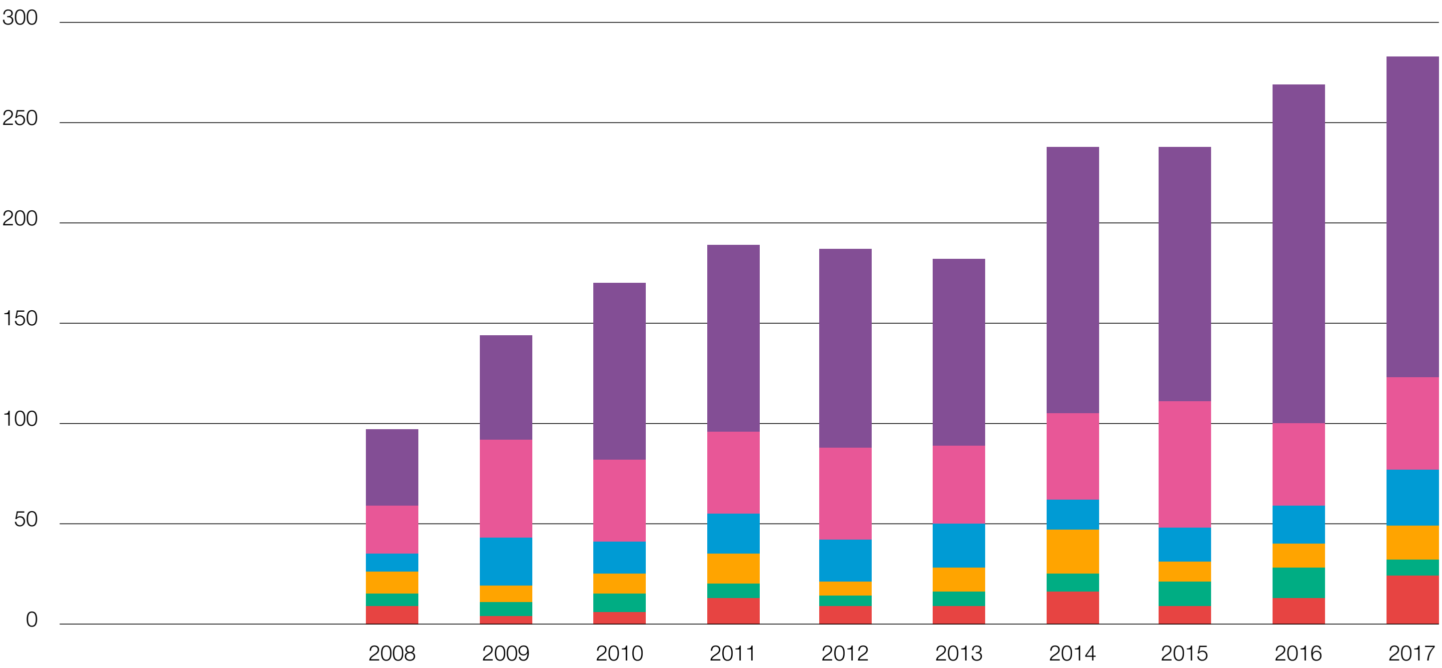
Data updated since publication of the 2017 Yearbook.

See note to Figure 1.

Figure 4 shows that one reason for the decrease in the median budget for cultural test films is the growth in the number of very low budget (under £500,000) productions being awarded final certification. This growth suggests that UK tax relief has become more accessible to low budget filmmakers following the introduction of the cultural test in 2007. At the same time, the total number of high budget (over £10 million) films with final certification has increased over the period. From 2008 there were generally around 15 such films per year, but there have been over 20 of these films each year since 2014. These figures may, in part, be due to the recent changes to qualifying spend thresholds in the tax relief rules.

As the number of film productions certified under the UK's co-production treaties during the period was low, annual figures are not disclosed to maintain confidentiality.

Figure 4 Films with final cultural test certification by budget band, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
≥£30 million	9	4	6	13	9	9	16	9	13	24
£10 - £29.9 million	6	7	9	7	5	7	9	12	15	8
£5 - £9.9 million	11	8	10	15	7	12	22	10	12	17
£2 - £4.9 million	9	24	16	20	21	22	15	17	19	28
£0.5 - £1.9 million	24	49	41	41	46	39	43	63	41	46
<£0.5 million	38	52	88	93	99	93	133	127	169	160
Total	**97**	**144**	**170**	**189**	**187**	**182**	**238**	**238**	**269**	**283**

Source: DCMS, BFI

Table 1 shows the distribution of budgets by budget band for films certified under the cultural test in the period. The 6% of films with budgets of £30 million or over accounted for 77% of the aggregate budget, while the 74% of films with budgets of under £2 million accounted for only 4% of the aggregate budget. This reflects both the growth in the overall number of low budget cultural test films and of big budget inward investment titles in the top budget band. (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, eg locations, and/or the UK's filmmaking infrastructure and/or UK film tax relief.)

Table 1 Films with final cultural test certification, budget distribution by budget band, 2008-2017

Budget band (£ million)	Number	% number	Total budget (£ million)	% budget
≥30	112	5.6	11,228	76.7
10 - 29.9	85	4.3	1,296	8.9
5 - 9.9	124	6.2	892	6.1
2 - 4.9	191	9.6	608	4.2
0.5 - 1.9	433	21.7	435	3.0
<0.5	1,052	52.7	172	1.2
Total	**1,997**	**100.0**	**14,631**	**100.0**

Source: DCMS, BFI

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

The budget distribution for finally certified co-productions between 2008 and 2017 was much more evenly spread by budget band than that for cultural test films (Table 2). The majority of the aggregate budget (82%) is associated with films in the £2 million - £29.9 million range, whereas films budgeted at £30 million or over account for only 14% of the total budget, compared with 77% for cultural test films. The table also highlights the small proportion of very low budget co-productions (6%), a marked contrast with cultural test films.

Table 2 Films with final co-production certification, budget distribution by budget band, 2008-2017

Budget band (£ million)	Number	% number	Total budget (£ million)	% budget
≥30	3	2.4	120	14.3
10 - 29.9	20	15.7	320	38.0
5 - 9.9	32	25.2	231	27.4
2 - 4.9	41	32.3	141	16.7
0.5 - 1.9	24	18.9	29	3.4
<0.5	7	5.5	2	0.2
Total	**127**	**100.0**	**842**	**100.0**

Source: DCMS, BFI

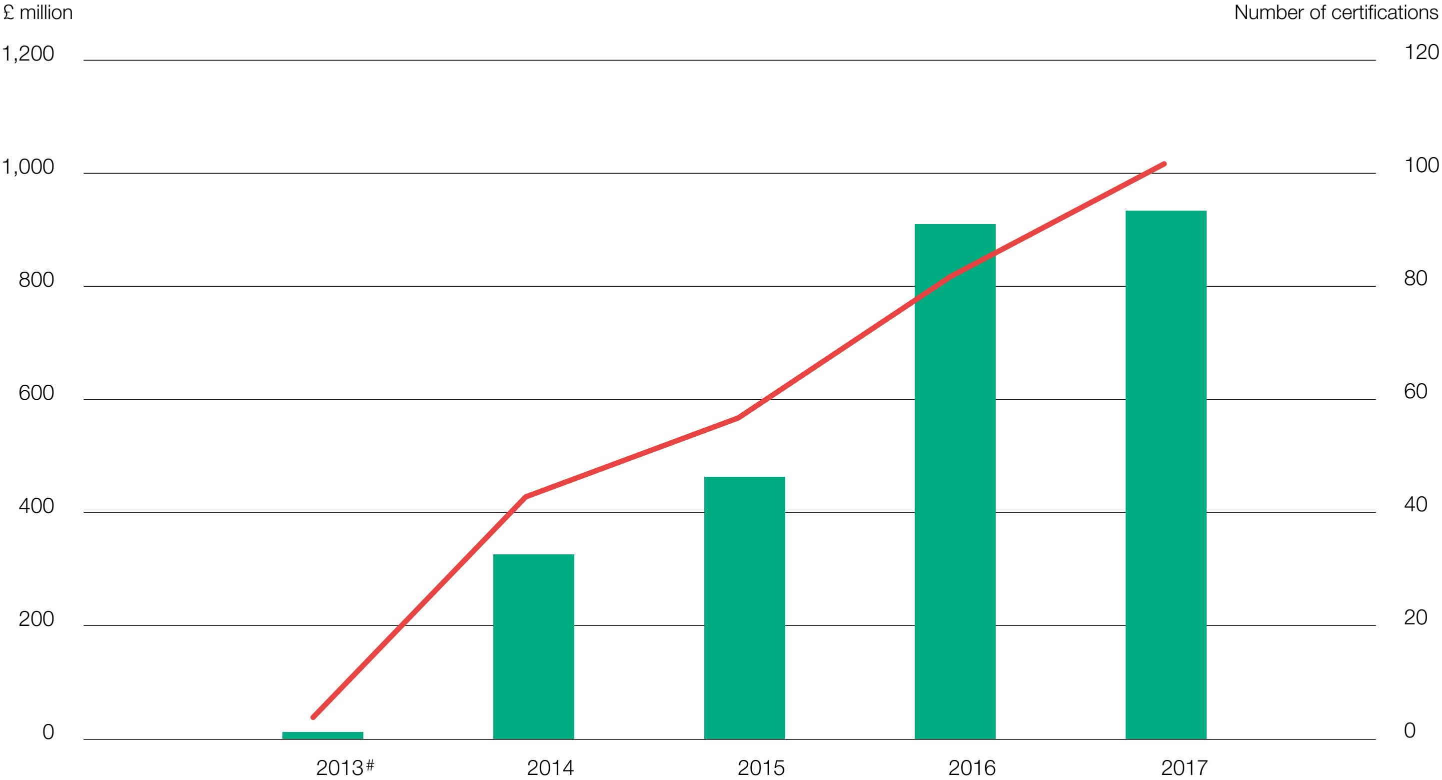
Note: Figures/percentages may not sum to totals due to rounding.

HIGH-END TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2013-2017

The number of HETV productions receiving final certification as British under the cultural test has increased year on year since the tax relief was introduced in 2013 (Figures 5 and 6). In 2017, 103 qualifying HETV productions, with a total combined budget of £935 million, received final certification, up from 83 projects, with a total budget of £912 million, in 2016. However, the UK spend associated with these projects decreased from £769 million in 2016 to £676 million. As a percentage of total budget, the UK spend associated with these projects also fell, from 84% in 2016 to 72%.

As the number of HETV productions certified under the UK's co-production treaties has been consistently low over the period, figures are not disclosed to maintain confidentiality.

Figure 5 Total budget and number of HETV productions* with final cultural test certifications, 2013-2017



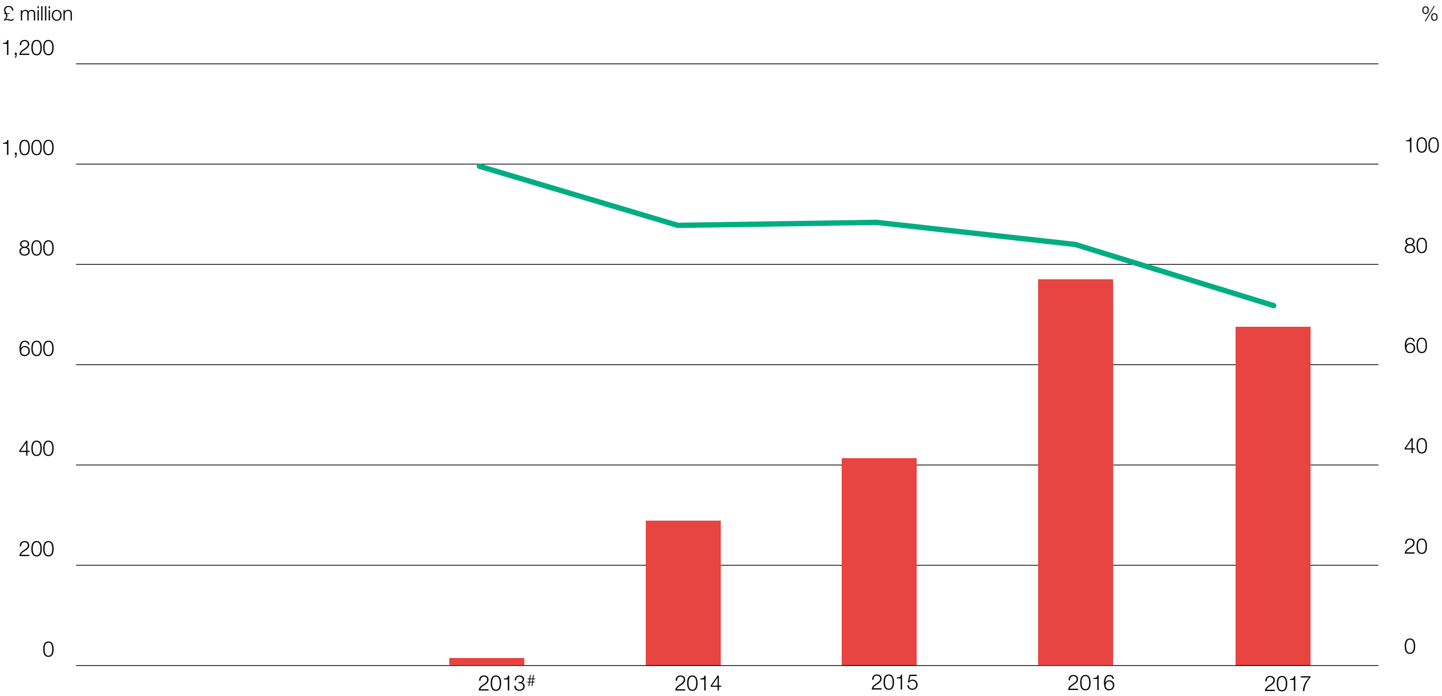
	2013#	2014	2015	2016	2017
Total budget (£ million)	13.2	326.9	464.7	911.5	935.1
Number	5	44	58	83	103

Source: DCMS, BFI

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

Figure 6 UK spend of HETV productions* with final cultural test certification and UK spend as % of total budget, 2013-2017



	2013#	2014	2015	2016	2017
UK spend (£ million)	13.2	288.2	412.7	768.9	675.5
UK spend as % of total budget	100.0	88.2	88.8	84.4	72.2

Source: DCMS, BFI

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

Over the period, the average median budget per minute of HETV productions receiving final certification under the cultural test was around £20,000. In 2017, the median budget was £22,764.

Table 3 Median budgets of HETV productions* with final cultural test certification, 2013-2017

Year	Median budget per minute (£)
2013#	15,786
2014	21,253
2015	20,866
2016	22,818
2017	22,764

Source: DCMS, BFI

Notes:

The median is the middle value, ie 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.

Image: *Stan Lee's Lucky Man* courtesy of Carnival Film & Television Limited

ANIMATION TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2014-2017

As Table 4 shows, a total of 41 animation television productions received final certification as British under the cultural test in 2017, up from 38 productions in 2016, and the second highest number of the period 2014-2017. (Data for 2013 is not shown to avoid disclosing the UK spend and budgets of individual productions.) The combined total budget of finally certified animations in 2017 was £52 million, down from £62 million in 2016, but the associated UK production value increased slightly from £44.5 million in 2016 to £45 million. At 86%, the UK spend associated with these projects as a percentage of total budget in 2017 was the highest of the period.

As the number of animation television productions receiving final certification under the UK's co-production treaties has 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 2017, the median budget was £5,384.

Table 4 Animation television productions* with final cultural test certifications, 2014-2017

	2014	2015	2016	2017
Number	14	51	38	41
UK spend (£ million)	10.5	62.2	44.5	45.1
Total budget (£ million)	21.5	86.4	62.2	52.4
UK spend as % of total budget	49.0	72.0	71.6	86.0
Median budget per minute (£)	7,043	6,851	8,044	5,384

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of productions above and below the median.

Data updated since publication of the 2017 Statistical Yearbook.

* A production can be a single programme or a television series.

CHILDREN'S TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2016 AND 2017

The number of children's television programmes receiving final certification as British under the cultural test in 2017 was almost double the total in 2016 (Table 5). There were 65 final certifications in 2017, with an associated total budget of £50 million, compared with 36 certifications in 2016 with an associated budget of just over £25 million. The UK production value of these projects also increased, from £25 million in 2016 to £46 million. The UK spend as a percentage of total budget was higher for children's television projects than the other production categories in this analysis; it was 99% in 2016 and 93% in 2017. (Data for 2015 is not shown to avoid disclosing the UK spend and budgets of individual productions.)

As the number of children's television projects certified under the UK's co-production treaties in the period has been low, figures are not disclosed to maintain confidentiality.

The median budget per minute for children's television productions certified under the cultural test in 2017 was £1,793, a slight fall from the median in 2016 (£1,930).

Table 5 Children's television productions* with final cultural test certifications, 2016 and 2017

	2016	2017
Number	36	65
UK spend (£ million)	25.0	46.2
Total budget (£ million)	25.4	49.9
UK spend as % of total budget	98.5	92.6
Median budget per minute (£)	1,930	1,793

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of productions above and below the median.

Data updated since publication of the 2017 Statistical Yearbook.

* A production can be a single programme or a television series.

VIDEO GAME FINAL CERTIFICATIONS, 2015-2017

A total of 212 video game projects received final certification as British in 2017 compared with 189 in 2016 (Table 6). The total budget for these projects was £278 million, up from £225 million in 2016, and the associated UK production value was £249 million, up from £202 million in 2016. The UK spend as a percentage of total budget for qualifying video game projects was 90% in both 2016 and 2017; it was 68% in 2015. (Data for 2014 is not shown to avoid disclosing the UK spend and budgets 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 game projects with final certification in 2017 was £142,425.

Table 6 Video games with final cultural test certification, 2015-2017

	2015	2016	2017
Number	116	189	212
UK spend (£ million)	180.9	202.2	248.8
Total budget (£ million)	265.6	224.5	277.5
UK spend as % of total budget	68.1	90.1	89.7
Median budget (£)	110,902	168,469	142,425

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of films above and below the median.

Data updated since publication of the 2017 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 in the UK between 1994 and 2017. 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

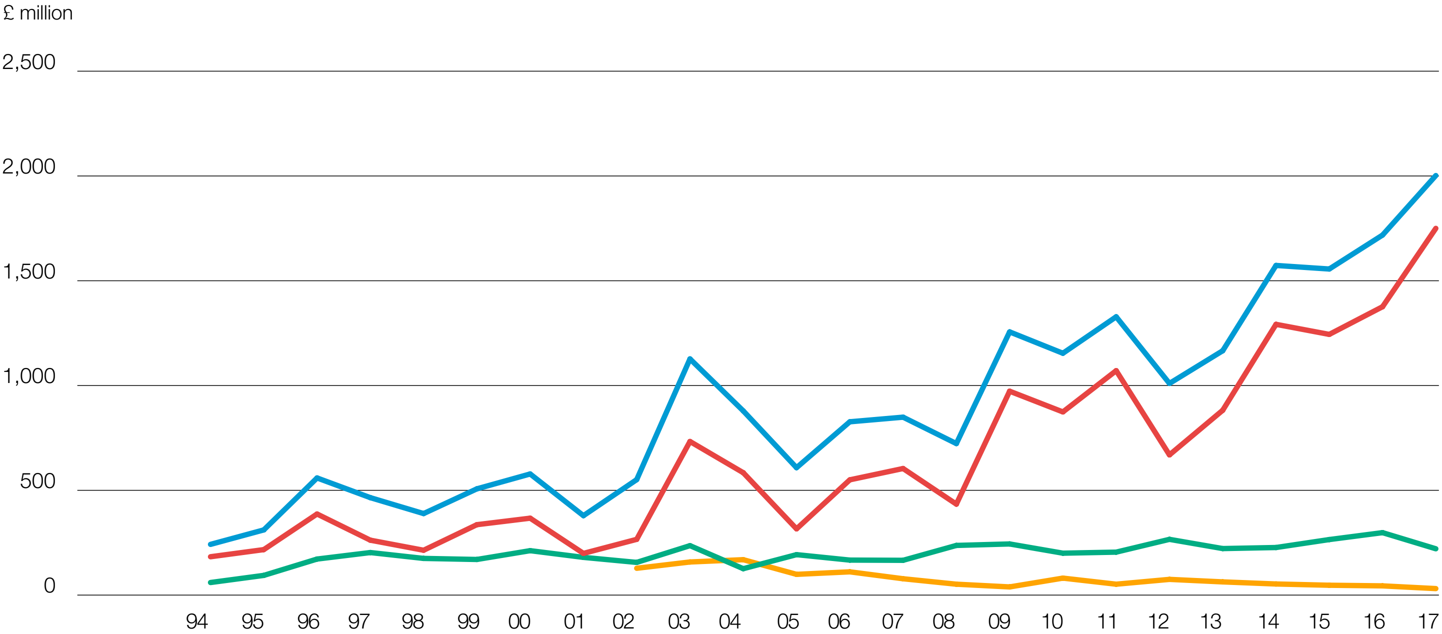
As Figure 7 shows, the aggregate UK spend of features that commenced principal photography in 2017 was £2 billion, the highest figure since our records began. This was the fourth year in a row to see record or near record values for UK film production activity. The high figures of these four years coincides with the extended tax relief for film introduced by the UK government in 2014.

The increase in UK film production spend in the last few years is due primarily to a surge in inward investment films. In 2017, these films contributed a record-breaking £1.8 billion towards the total UK production value, an increase of 27% from £1.4 billion in 2016. The proportion of overall UK spend attributed to inward features was 87%, again a record high. Some of the big budget films contributing to this figure were *Avengers: Infinity War, Mamma Mia! Here We Go Again* and *Solo: A Star Wars Story.*

Domestic UK features, including *Johnny English Strikes Again, Mary Queen of Scots* and *Yardie*, had a UK production value of £221 million, down from £298 million in 2016. The UK spend of official and unofficial co-productions was £31 million, down from £44 million in 2016. Co-productions commencing principal photography in the year included *Born a King, Cold War* and *The Little Stranger.*

Figure 7 shows the degree to which both the growth and annual variation in the total value of UK spend since 1994 has 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 £195 million per year, while there has been a decline in the UK spend of co-productions. The decrease in the production value associated with co-productions reflects the fall in the numbers of films using this financing model following the government's tightening of co-production certification requirements and redesign of the post-2006 tax relief to accrue more benefit to the UK economy.

Figure 7 UK spend of feature films produced in the UK, 1994-2017



	94	95	96	97	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17
Inward investment	183	217	387	262	214	336	367	199	266	733	584	316	550	604	434	973	874	1,071	669	882	1,292	1,244	1,376	1,750
Domestic	60	94	172	203	175	170	212	180	156	236	126	193	167	166	237	244	200	205	266	222	227	265	298	221
Co-production	-	-	-	-	-	-	-	-	128	158	169	99	111	78	52	39	81	52	75	63	53	47	44	31
Total	**242**	**311**	**559**	**465**	**389**	**507**	**578**	**379**	**551**	**1,127**	**879**	**608**	**827**	**849**	**723**	**1,256**	**1,154**	**1,328**	**1,010**	**1,166**	**1,573**	**1,556**	**1,718**	**2,002**

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.

Data for UK co-productions are not available by production year prior to 2002.

Inward investment feature films include inward co-productions from 2002 and VFX-only films.

Films with budgets under £500,000 are included after 2008.

Data updated since publication of the 2017 Statistical Yearbook.

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 (eg 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 7 distinguishes UK independent films from UK studio-backed films and non-UK films made partly or wholly in the UK. In 2017, UK independent films accounted for 31% of overall production spend in the UK, a decrease from 36% in 2016. (A UK independent film is one produced without creative or financial input from the major US studio companies.)

Table 7 Value of UK spend of UK studio-backed* and UK independent films, 2008-2017, £ million

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK studio-backed films	429	955	845	1,039	669	770	1,015	1,147	1,095	1,379
UK independent films	291	296	289	280	333	392	556	404	620	621
Non-UK films	24	48	22	41	8	4	3	5	3	3
Total	**723**	**1,256**	**1,154**	**1,328**	**1,010**	**1,166**	**1,573**	**1,556**	**1,718**	**2,002**

Source: BFI

See notes to Figure 7.

* '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.

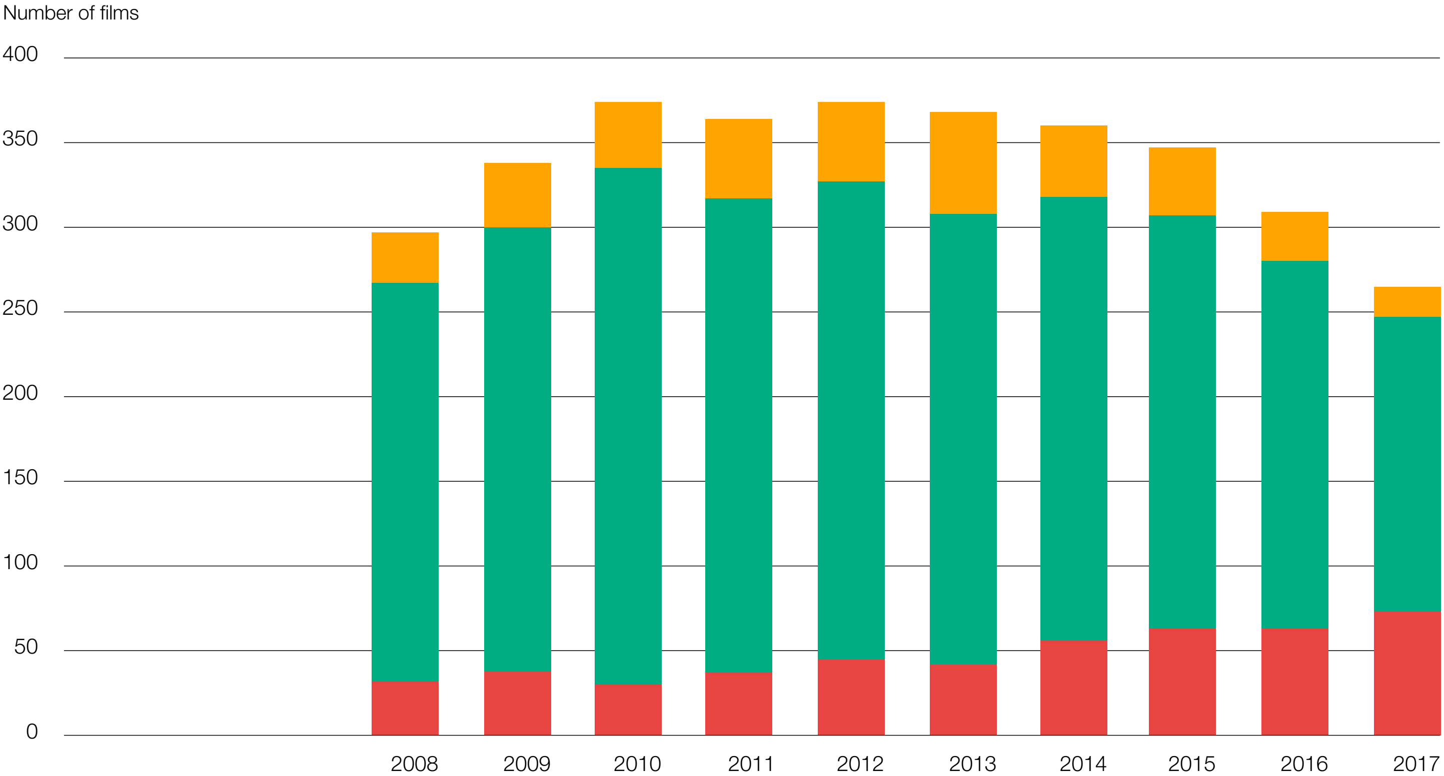
Image: *Mamma Mia! Here We Go Again* ©2017 Universal Studios. Courtesy of Universal Studios Licensing LLC

THE VOLUME OF UK FILM PRODUCTION

As Figure 8 shows, the number of films produced in the UK grew from 297 in 2008 to a peak of 374 in both 2010 and 2012. While the overall numbers have declined since then, inward investment films have seen year-on-year rises since 2014.

In 2017, 265 films were produced wholly or in part in the UK, down from 309 in 2016. Of these, 18 were co-productions, 174 were domestic UK features (of which 102 had budgets of less than £500,000) and 73 were inward investment films. The number of co-productions was the lowest of the 10-year period covered in the chart, but the largest year-on-year fall was in domestic UK features with budgets of less than £500,000, which were down from 130 in 2016. 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 few years are likely to be revised upwards.

Figure 8 Number of feature films produced in the UK, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Inward investment	**32**	**38**	**30**	**37**	**45**	**42**	**56**	**63**	**63**	**73**
Domestic UK	**235**	**262**	**305**	**280**	**282**	**266**	**262**	**244**	**217**	**174**
Of which budget ≥ £500,000	82	90	77	91	77	71	85	88	87	72
Of which budget < £500,000	153	172	228	189	205	195	177	156	130	102
Co-production	**30**	**38**	**39**	**47**	**47**	**60**	**42**	**40**	**29**	**18**
Of which majority and parity co-production	14	13	25	24	25	34	18	18	10	8
Of which minority co-production	16	25	14	23	22	26	24	22	19	10
Total	**297**	**338**	**374**	**364**	**374**	**368**	**360**	**347**	**309**	**265**

Source: BFI RSU

Notes:

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

Includes both official and unofficial co-productions.

Data updated since publication of the 2017 Statistical Yearbook.

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.

We are unable to provide data for all individual categories of film produced wholly or in part in the UK in 2017 for disclosure reasons, but as in previous years UK independent films accounted for the majority of productions during the year (Table 8).

Table 8 Numbers of UK studio-backed* and independent films, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK studio-backed films	13	16	14	13	17	17	16	21	c	c
UK independent films	268	297	352	332	350	343	338	321	289	244
Non-UK films	16	25	8	19	7	8	6	5	c	c
Total	**297**	**338**	**374**	**364**	**374**	**368**	**360**	**347**	**309**	**265**

Source: BFI
Notes:
Data updated since publication of the 2017 Statistical Yearbook.
c indicates data suppressed for disclosure reasons.

FILM PRODUCTIONS BY GENRE, 2015-2017

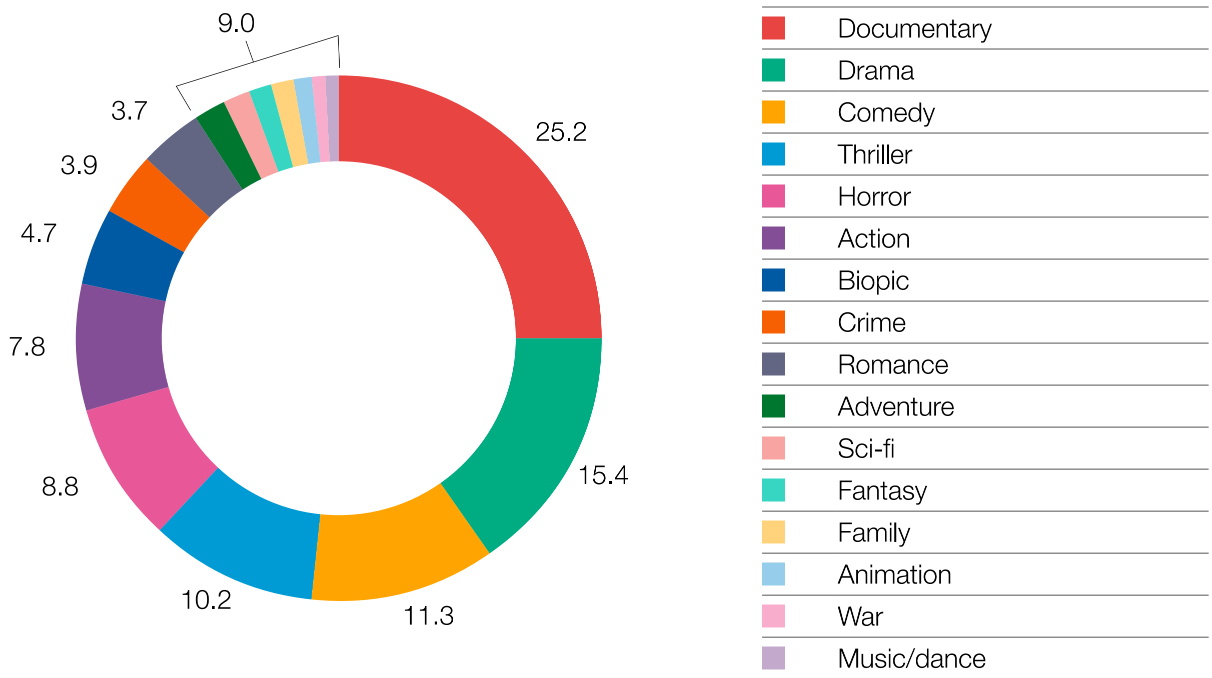
Table 9 and Figure 9 show a breakdown of production by genre for the years 2015-2017. The documentary and drama genres accounted for the highest proportion of films, at 25% and 15% respectively, but only 2% and 7% of total UK spend. These were followed by comedy and thriller which accounted for 11% and 10% respectively of productions, and 6% and 3% of respective UK spend. The biggest spending genre was action, which accounted for 37% of overall UK spend, but only 8% of films.

Table 9 Genre of film production in the UK, 2015-2017 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	72	7.8	3,847.0	43.1	1,946.0	36.9
Adventure	18	2.0	904.6	10.1	573.6	10.9
Fantasy	13	1.4	516.1	5.8	394.2	7.5
Drama	142	15.4	548.9	6.2	371.0	7.0
Comedy	104	11.3	445.7	5.0	326.4	6.2
Biopic	43	4.7	388.0	4.3	271.1	5.1
Family	11	1.2	356.6	4.0	232.8	4.4
Sci-fi	17	1.8	355.7	4.0	209.6	4.0
Animation	10	1.1	325.5	3.6	191.2	3.6
Music/dance	6	0.7	233.5	2.6	186.3	3.5
Romance	34	3.7	221.4	2.5	153.6	2.9
Thriller	94	10.2	298.2	3.3	144.0	2.7
Crime	36	3.9	235.5	2.6	123.2	2.3
Documentary	232	25.2	117.5	1.3	85.6	1.6
Horror	81	8.8	89.6	1.0	49.6	0.9
War	8	0.9	36.4	0.4	18.8	0.4
Total	**921**	**100.0**	**8,920.2**	**100.0**	**5,277.0**	**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.
Figures/percentages may not sum to totals due to rounding.

Figure 9 Genre of UK film production 2015-2017 (% of films)



Source: BFI

Looking at the breakdown by genre of UK independent films alone over the three-year period (Table 10), the pattern was fairly similar. The main difference was that drama, comedy, biopic and thriller together accounted for a much greater proportion of total UK spend than for all films produced in the UK (54% compared with 21%) and action accounted for a lower proportion (17% compared with 37%).

Table 10 Independent UK productions by genre 2015-2017 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	140	16.4	462.9	17.7	312.3	19.0
Action	50	5.9	436.6	16.7	286.4	17.4
Comedy	100	11.7	330.6	12.7	237.9	14.5
Biopic	39	4.6	278.4	10.7	201.2	12.2
Thriller	91	10.7	221.8	8.5	134.5	8.2
Romance	32	3.7	130.8	5.0	80.9	4.9
Documentary	228	26.7	103.0	3.9	79.6	4.8
Animation	8	0.9	118.6	4.5	71.0	4.3
Family	7	0.8	77.7	3.0	67.9	4.1
Crime	34	4.0	128.5	4.9	55.1	3.3
Horror	79	9.3	47.1	1.8	34.0	2.1
Adventure	13	1.5	196.1	7.5	33.8	2.1
War	8	0.9	36.4	1.4	18.8	1.1
Music/dance	4	0.5	16.0	0.6	15.9	1.0
Sci-fi	12	1.4	16.0	0.6	8.2	0.5
Fantasy	9	1.1	7.8	0.3	7.7	0.5
Total	**854**	**100.0**	**2,608.2**	**100.0**	**1,645.1**	**100.0**

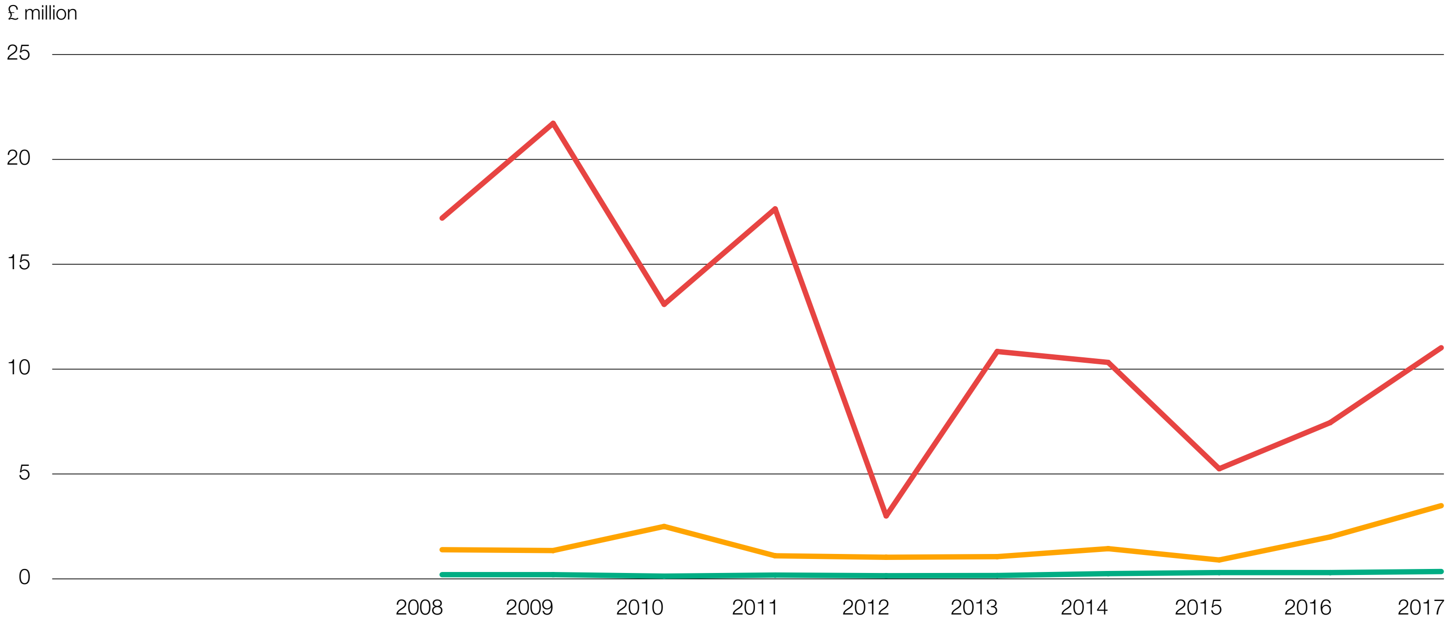
Source: BFI

See notes to Table 9.

BUDGET TRENDS

The median budget for domestic features in 2017 was £350,000, up from £300,000 in 2016 (Figure 10). It should be noted that the 2017 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 £11 million, up from £7.5 million in 2016, while for co-productions the median budget increased from £2 million to an unusual high of £3.5 million.

Figure 10 Median feature film budgets, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Inward investment	17.20	21.72	13.09	17.64	3.00	10.84	10.32	5.25	7.45	11.02
Domestic UK	0.20	0.20	0.13	0.18	0.15	0.16	0.25	0.30	0.30	0.35
Co-production	1.39	1.35	2.50	1.10	1.03	1.06	1.44	0.90	2.00	3.49

Source: BFI

Notes:

Median budget is the middle value of budgets (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 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 2017 Statistical Yearbook.

SIZE DISTRIBUTION OF BUDGETS

The budget size distribution for the three main categories of films made in 2017 is shown in Tables 11 to 13.

For inward investment features, the 27 films with budgets of £30 million or over (37% of all inward features) accounted for 90% of the total budget for this category (Table 11). There were 21 inward features with budgets of less than £5 million (29% of inward features), which accounted for 2% of the total budget for these films.

Table 11 Size distribution of budgets, inward investment features, 2017

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£30 million	27	2,995.6	90.1
£10 - £29.9 million	12	170.4	5.1
£5 - £9.9 million	13	103.4	3.1
£2 - £4.9 million	12	45.3	1.4
<£2 million	9	9.3	0.3
Total	**73**	**3,324.1**	**100.0**

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

Almost 59% of domestic UK features (102) had budgets of under £500,000, and only 10 productions (6% of domestic UK projects) had budgets of £5 million or over (Table 12). The domestic UK films in the highest budget band accounted for 50% of this category's aggregate budget, while those in the lowest budget band accounted for 7%.

Table 12 Size distribution of budgets, domestic UK features, 2017

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	10	127.2	50.0
£2 - £4.9 million	20	64.3	25.3
£0.5 - £1.9 million	42	45.1	17.7
<£0.5 million	102	18.0	7.1
Total	**174**	**254.6**	**100.0**

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

Six of the 18 co-productions produced in the UK in 2017 had budgets of £5 million or over, accounting for 72% of the total budget in this category (Table 13). The co-productions with budgets of under £500,000 accounted for 1.5% of the total budget.

Table 13 Size distribution of budgets, co-productions, 2017

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	6	54.5	72.2
£2 - £4.9 million		15.5	20.6
£0.5 - £1.9 million	12	4.3	5.7
<£0.5 million		1.1	1.5
Total	**18**	**75.4**	**100.0**

Source: BFI

Note: The number of co-productions with budgets under £5 million has been aggregated for disclosure reasons, due to the low numbers in the individual budget bands.

BIG BUDGET PRODUCTIONS, 2008-2017

The importance to UK spend of a small number of big budget productions – usually inward investment films – is demonstrated in Table 14. In 2017, the 29 films with budgets of £30 million or over accounted for 81% of UK production spend, the highest proportion of UK spend attributed to this budget category since our records began. All except two of these films were inward investment features.

Table 14 Big budget films’ contribution to UK spend, 2008-2017

	Number of films with budgets ≥£30 million	Value of associated UK spend (£ million)	Total UK spend (£ million)	Big budget film % of UK spend
2008	13	410.8	723.3	56.8
2009	17	887.4	1,256.1	70.6
2010	12	822.0	1,154.3	71.2
2011	17	1,009.8	1,327.7	76.1
2012	10	634.3	1,009.6	62.8
2013	16	817.0	1,165.9	70.1
2014	20	1,157.1	1,573.0	73.6
2015	16	1,116.6	1,556.4	71.7
2016	25	1,331.5	1,718.2	77.5
2017	29	1,614.1	2,002.4	80.6

Source: BFI

Note: Data updated since publication of the 2017 Statistical Yearbook.

UK SPEND AS PERCENTAGE OF TOTAL PRODUCTION BUDGET

Table 15 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 2017, the UK spend of domestic films was 87% of total budget, for inward investment films it was 53% and for co-productions it was 42%.

Table 15 UK spend as percentage of total production budget, 2008-2017

	Inward investment	Domestic UK	Co-production
2008	46.9	77.1	43.5
2009	53.0	81.5	37.2
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	45.0
2014	57.2	78.7	34.0
2015	60.8	89.7	40.2
2016	59.3	81.1	37.1
2017	52.6	86.9	41.6

Source: BFI

Note: Data updated since publication of the 2017 Statistical Yearbook.

Figure 11 underlines that a small proportion (11%) of titles with a UK spend of £30 million or over are responsible for the majority (81%) of UK production spend. Conversely, the 41% of films with a UK spend of less than £500,000 represent less than 1% of production investment in the UK.

Figure 11 Percentage of productions and UK spend by category of UK spend, 2017

Source: BFI

DOMESTIC UK PRODUCTIONS BY TERRITORY OF SHOOT

Table 16 shows that the majority of domestic UK productions beginning principal photography in 2017 (130 out of 174) were shot exclusively in the UK, while 44 were shot partly or wholly outside the country. The non-UK spend of domestic productions in 2017 as a proportion of their total budget was 13%.

Table 16 Domestic UK productions by territory of shoot, 2017

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	130	186.5	5.1	2.7
UK and other/wholly outside the UK	44	68.1	28.2	41.4
Total domestic UK films	**174**	**254.6**	**33.3**	**13.1**

Source: BFI

Table 17 shows the number of shoots by territory for domestic UK films in 2017. 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 15 shoots in the USA, five in France and three in Spain.

Table 17 Domestic UK productions, shoots by territory or region, 2017

Territory of shoot	Number of shoots
UK	162
USA	15
France	5
Spain	3
Bulgaria	2
Canada	2
India	2
Italy	2
Jamaica	2
Morocco	2
South Africa	2
Other Europe	6
Other	10
Total	**215**

Source: BFI

CO-PRODUCTIONS BY TERRITORY OF SHOOT

In contrast to domestic UK films, co-productions beginning principal photography in 2017 were usually shot partly or wholly abroad; only three out of 18 films were shot wholly in the UK (Table 18).

Table 18 Co-productions by territory of shoot, 2017

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	3	12.8	2.1	16.2
UK and other	11	45.3	28.9	63.8
Wholly outside the UK	4	17.3	13.1	75.4
Total co-productions	**18**	**75.4**	**44.0**	**58.4**

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 19. As most co-productions were shot in two or more territories, the total number of shoots was greater than the total number of films. There were five shoots in Germany and three in the Republic of Ireland.

Table 19 Co-productions, shoots by territory or region, 2017

Territory of shoot	Number of shoots
UK	14
Germany	5
Republic of Ireland	3
Other Europe	7
Other	4
Total	**33**

Source: BFI

PRODUCTION COMPANY ACTIVITY LEVELS

UK film production in 2017 was dispersed among a large number of production companies, as shown in Table 20. The BFI Research and Statistics Unit recorded 421 production companies associated with films shot in the UK or co-productions involving the UK in the year, an increase from 353 in 2016. Of these, 378 (90%) were associated with a single feature. Companies were a mixture of distinct production entities and special purpose vehicles set up to make a single film.

Table 20 Film production company activity, 2017

Number of features per company	Number of companies
4	3
3	11
2	29
1	378
Total	**421**

Source: BFI RSU

Note: Includes all production categories.

THE VALUE AND VOLUME OF HIGH-END TELEVISION PRODUCTION

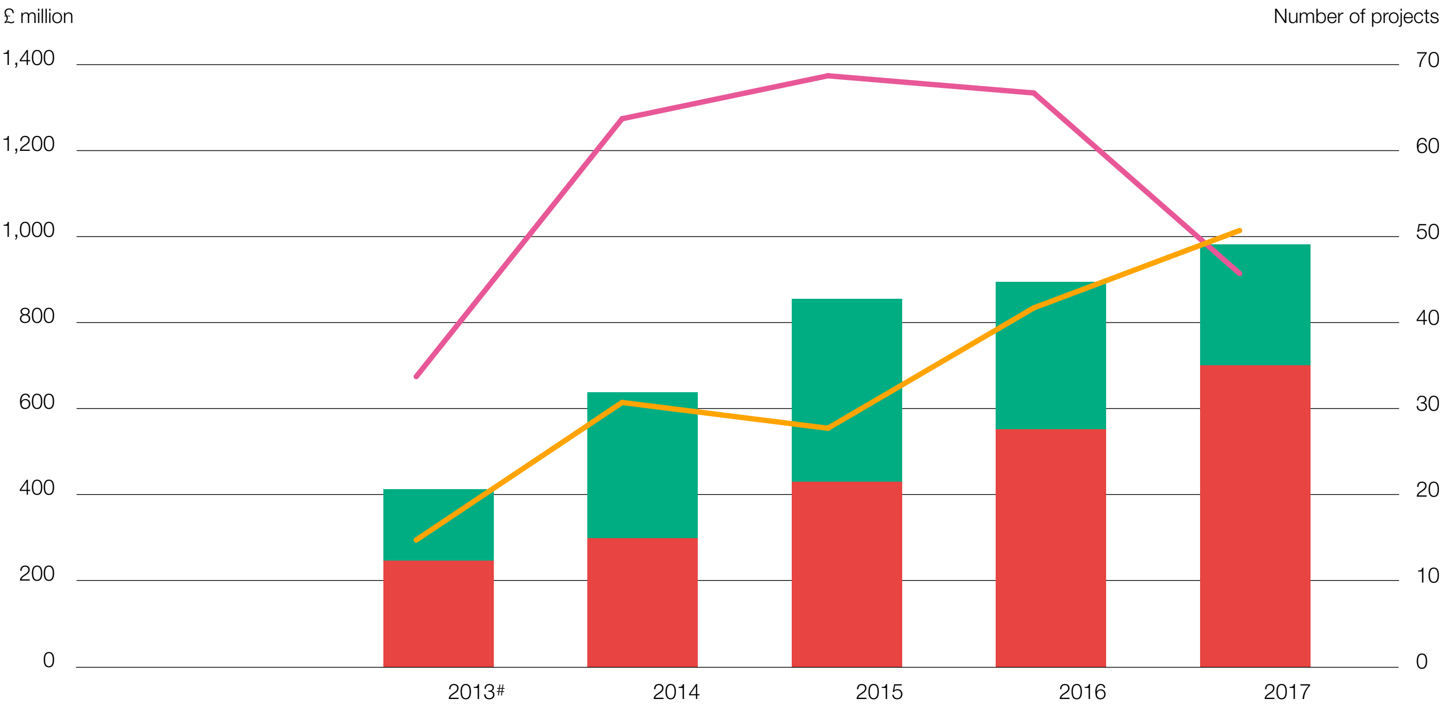
Figure 12 shows the number of UK qualifying HETV programmes produced between 2013 and 2017 and their associated UK spend. (It should be noted that, as the tax relief for HETV production came into force on 1 April 2013, the data for that year represents production activity for only part of the year.)

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 £985 million in 2017, up 9% compared with 2016 and an increase of 54% on 2014 (the first full year of data). For all years except 2014, co-productions and inward investment projects have contributed the majority of UK production spend. In 2017, this category represented 71% of the total UK spend but this was entirely due to inward investments as no qualifying co-productions started production in the year.

For the majority of the period, the total number of qualifying HETV projects produced in the UK increased year on year, peaking at 109 in 2016. Of the 97 projects produced in 2017, 51 were inward investment projects and 46 were domestic UK projects. This was the first year that the number of non-domestic productions was greater than the number of domestic projects but, as with feature films, the figures for recent years are likely to be revised as more detailed information on production activity becomes available.

Domestic HETV productions shooting in the UK in 2017 included *Derry Girls* (7 episodes), *A Discovery of Witches* (8 episodes) and *The Woman in White* (5 episodes). Inward investment productions included *The Dark Crystal: Age of Resistance* (10 episodes), *Howards End* (4 episodes) and *Philip K Dick's Electric Dreams* (10 episodes).

Figure 12 UK spend and number of UK qualifying HETV productions*, 2013-2017



	2013#	2014	2015	2016	2017
UK spend of co-production & inward investment projects	247.9	300.2	431.6	554.2	702.9
UK spend of domestic UK projects	167.1	339.9	426.5	342.6	281.6
Total UK spend	**414.9**	**640.0**	**858.1**	**896.7**	**984.6**
Number of co-production & inward investment projects	15	31	28	42	51
Number of domestic UK projects	34	64	69	67	46
Total number of projects	**49**	**95**	**97**	**109**	**97**

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 data for individual titles.

Data updated since publication of the 2017 Statistical Yearbook.

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

GENRE OF HIGH-END TELEVISION PRODUCTIONS

Table 21 shows a breakdown of 2017 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 40 productions (41% of the total) and a UK spend of £316 million (32% of the total), followed by thriller which accounted for 16 productions and 13% of total UK spend. Adventure, which accounted for only three productions, had the second highest share of UK spend at 22%.

Table 21 Genre of UK qualifying HETV productions*, 2017 (ranked by UK spend)

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	40	41.2	446.2	32.9	315.9	32.1
Adventure	3	3.1	303.2	22.3	213.2	21.7
Thriller	16	16.5	151.0	11.1	124.5	12.6
Crime	8	8.2	74.7	5.5	71.0	7.2
Comedy	13	13.4	76.0	5.6	67.5	6.9
Sci-fi	7	7.2	102.9	7.6	57.5	5.8
Biopic	4	4.1	98.5	7.3	52.7	5.4
Action	2	2.1	42.0	3.1	34.7	3.5
Fantasy	1	1.0	22.7	1.7	21.8	2.2
Romance	2	2.1	28.3	2.1	21.3	2.2
Documentary	1	1.0	11.8	0.9	4.4	0.4
Total	**97**	**100.0**	**1,357.3**	**100.0**	**984.6**	**100.0**

Source: BFI

Notes:

The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.

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

* A production can be a single programme or a television series.

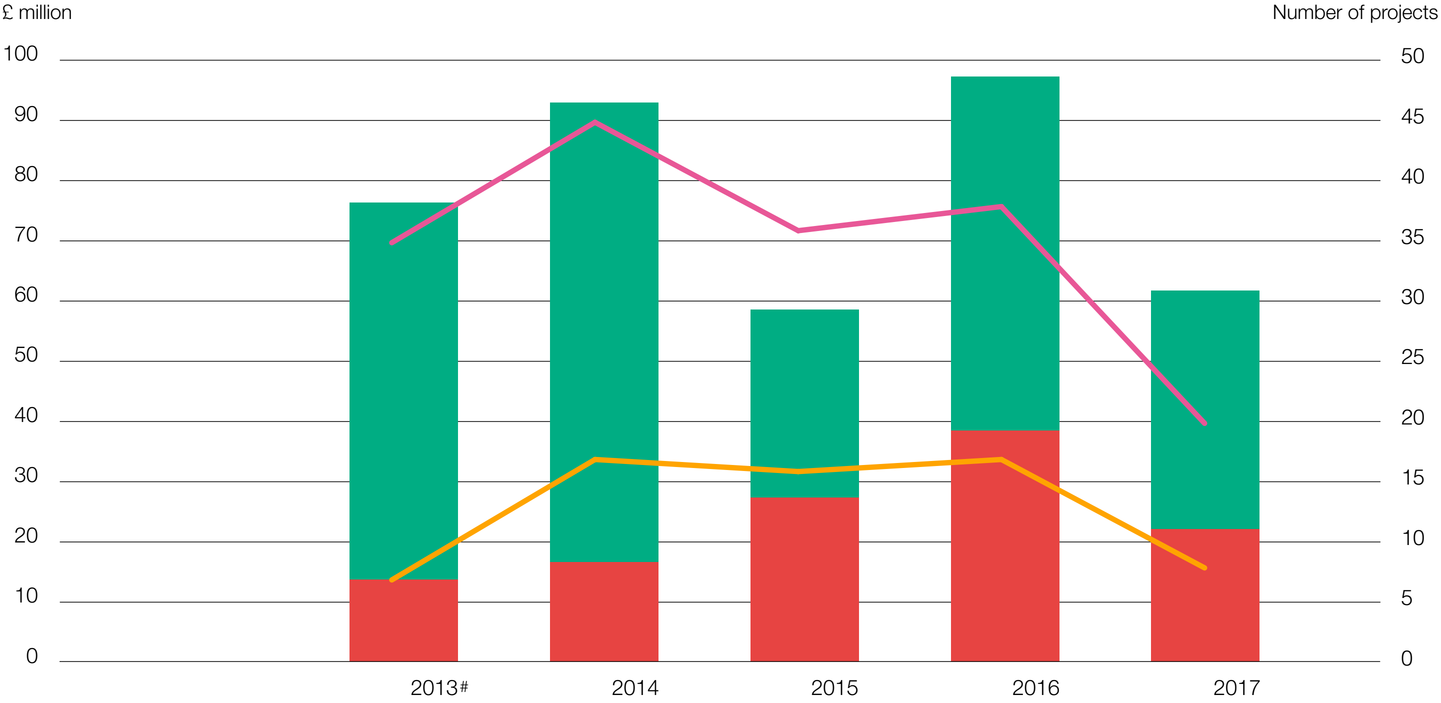
THE VALUE AND VOLUME OF ANIMATION TELEVISION PRODUCTION

Figure 13 shows the number of UK qualifying animation television programmes produced between 2013 and 2017 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 2017, the total UK production spend for UK qualifying animation programmes was £62 million, down from a high of £97 million in 2016. Unlike feature film and HETV programmes, domestic projects have accounted for the majority of the UK production value for animations throughout the period. In 2017, the production spend associated with domestic UK animation projects was £40 million (64% of the total), the second lowest value of the period. However, these figures are likely to be revised upwards as more detailed information becomes available.

A total of 28 UK qualifying animation projects commenced principal photography in 2017, down from 55 in 2016 and the lowest figure of the five-year period. There were 20 domestic UK projects and eight co-production and inward investment projects. Titles going into production in the year included *Floogals* – Series 2 (52 episodes), *Horatio: Genius for Hire* (26 episodes) and *Peppa Pig* – Series 5 (165 episodes).

Figure 13 UK spend and number of UK qualifying animation television productions*, 2013-2017



	2013#	2014	2015	2016	2017
UK spend of co-production & inward investment projects	13.6	16.5	27.2	38.3	22.0
UK spend of domestic UK projects	62.6	76.3	31.3	58.8	39.6
Total UK spend	**76.2**	**92.8**	**58.5**	**97.1**	**61.6**
Number of co-production & inward investment projects	7	17	16	17	8
Number of domestic UK projects	35	45	36	38	20
Total number of projects	**42**	**62**	**52**	**55**	**28**

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 data for individual titles.

* A production can be a single programme or a television series.

The data for 2013 cover the period April – December.

THE VALUE AND VOLUME OF CHILDREN'S TELEVISION PRODUCTION

Table 22 shows the UK spend associated with the production of UK qualifying children's television projects between 2015 and 2017. (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 2017, the UK production spend of qualifying children's television projects was £55 million, down from £61 million in 2016. Domestic UK productions accounted for the majority of UK spend across the period.

Table 22 UK spend of UK qualifying children's television productions*, 2015-2017 (£ million)

	2015#	2016	2017
Co-production & inward investment	7.5	21.2	19.5
Domestic UK	31.6	39.8	35.8
Total	**39.1**	**61.0**	**55.3**

Source: BFI

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 2017 Statistical Yearbook.

* A production can be a single programme or a television series.

The data for 2015 cover the period April – December.

A total of 46 UK qualifying children's television projects went into production in 2017, the majority of which were domestic UK productions (Table 23). While the table suggests a decline in the volume of projects since 2015, it should be borne in mind that the most recent figures are likely to be revised upwards. Titles going into production in 2017 included *Top Class* – Series 3 (17 episodes), *Waffle the Wonder Dog* (30 episodes) and *The Worst Witch* – Series 2 (13 episodes).

Table 23 Number of UK qualifying children's television programmes, 2015-2017

	2015	2016	2017
Co-production & inward investment	6	10	6
Domestic UK	52	51	40
Total	**58**	**61**	**46**

Source: BFI

See notes to Table 22.

THE VALUE AND VOLUME OF VIDEO GAMES DEVELOPMENT

Table 24 shows the UK spend associated with the development of UK qualifying video game projects between 2014 and 2017. (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 2017, the UK spend of qualifying video games was £132 million, a decrease from £390 million in 2016 and the lowest figure of the period. However, as with the other production categories, as more data becomes available the figures for the last few years are likely to be revised upwards. The breakdown between domestic UK and inward investment games in 2017 is not shown due to the low number of inward investment projects but, as in the other years in the period, domestic UK developments accounted for the largest share of UK production value.

Table 24 UK spend of UK qualifying video games, 2014-2017 (£ million)

	2014#	2015	2016	2017
Inward investment	89.9	54.7	84.3	c
Domestic UK	147.4	174.1	305.6	c
Total	**237.3**	**228.8**	**389.9**	**132.3**

Source: BFI

Notes:

Projects are allocated to the year development commenced.

Data updated since publication of the 2017 Statistical Yearbook.

The data for 2014 covers the period April – December.

'c' indicates the data have been suppressed due to low number of inward investments to avoid disclosing details of individual projects.

As Table 25 shows, the number of video game developments decreased substantially in 2017, falling from a high of 228 in 2016 to 41. However, there is a significant lag in the collection of data related to this category, so the number of developments for 2017 is likely to be revised upwards. Again, the breakdown between inward investment and domestic UK projects in 2017 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.

Table 25 Number of UK qualifying video games, 2014-2017

	2014	2015	2016	2017
Inward investment	11	8	13	c
Domestic UK	198	206	215	c
Total	**209**	**214**	**228**	**41**

Source: BFI

See notes to Table 24.

Awarding funds from The National Lottery®

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