



Film  
Forever



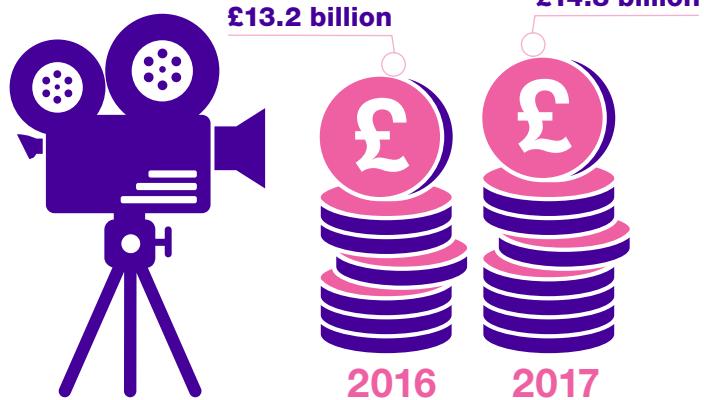
# THE UK FILM ECONOMY

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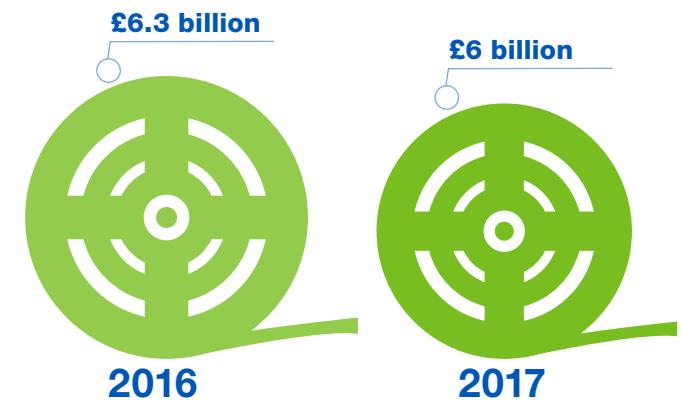
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# Facts in focus

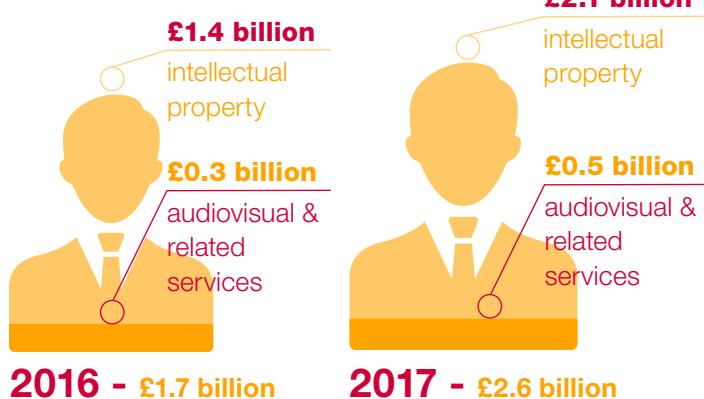
## FILM INDUSTRY TURNOVER



## 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

### % of companies

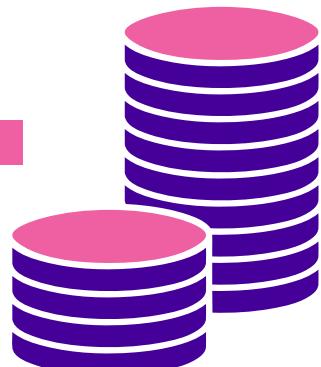
Film distribution 3%

Film production 52%

### % of turnover

Film distribution 40%

Film production 36%



## COMPANY SIZE



## GEOGRAPHICAL DISTRIBUTION OF COMPANIES



# The UK film economy

## FILM INDUSTRY TURNOVER, 2008-2017

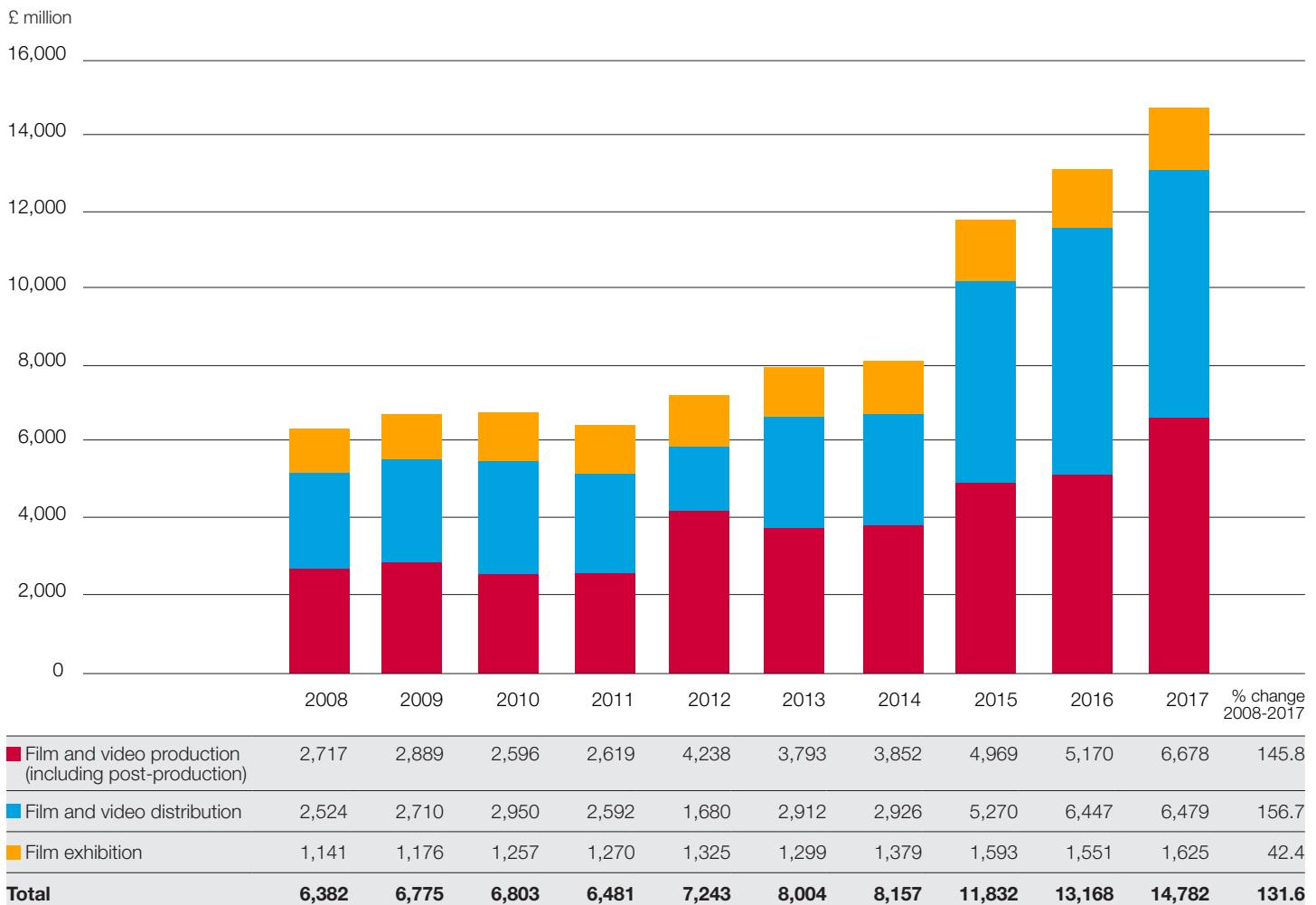
Figure 1 shows the total turnover of the UK's three main film industry sectors (film and video production, film and video distribution and film exhibition) for the 10-year period 2008-2017. Each of the three sectors has shown growth over the decade, with total industry turnover increasing by 132% from £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**



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
<b>Total</b>	<b>14,782</b>	<b>100.0</b>

Source: Office for National Statistics Annual Business Survey

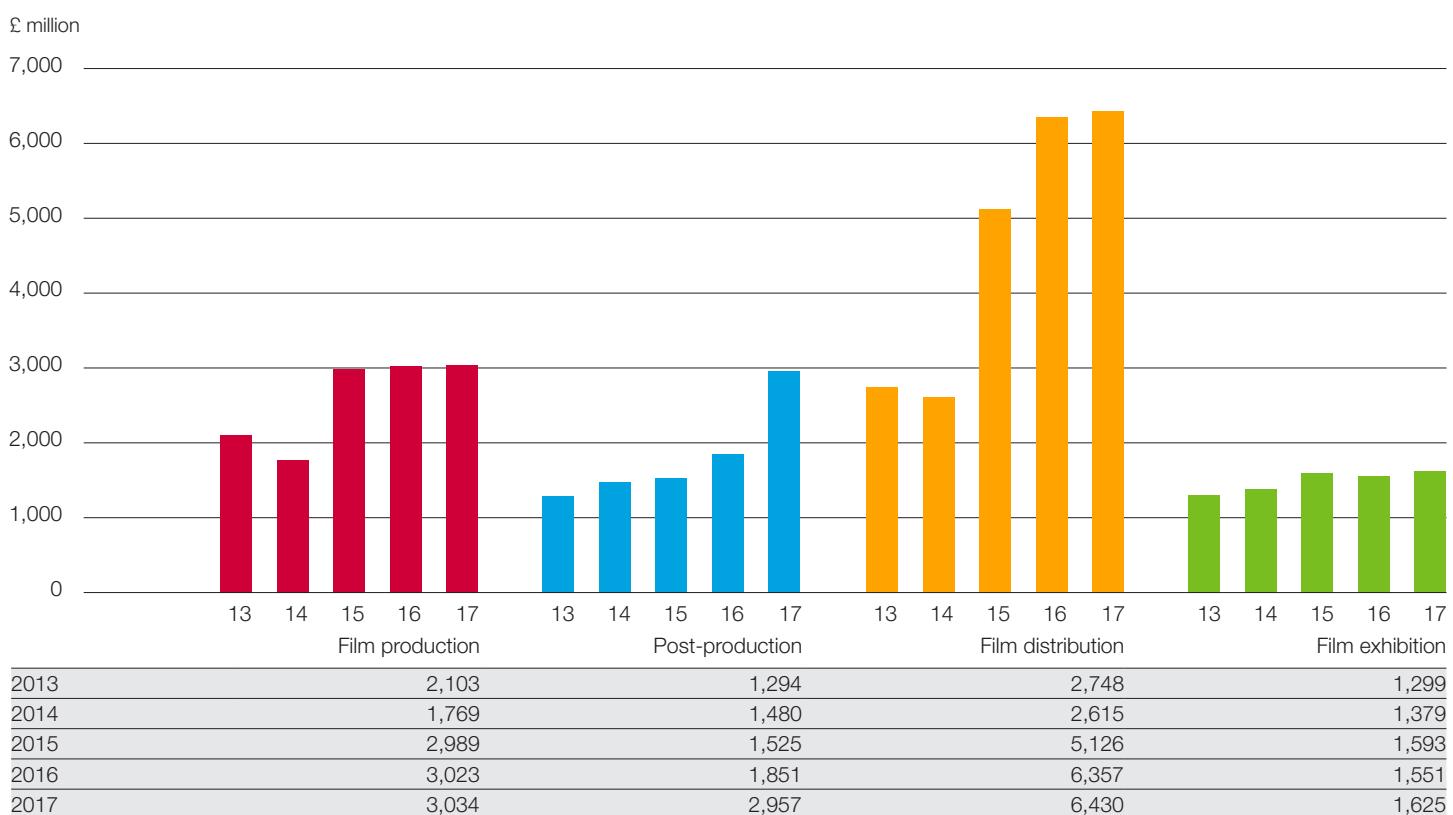
Notes:

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**



Source: Office for National Statistics Annual Business Survey

Notes:

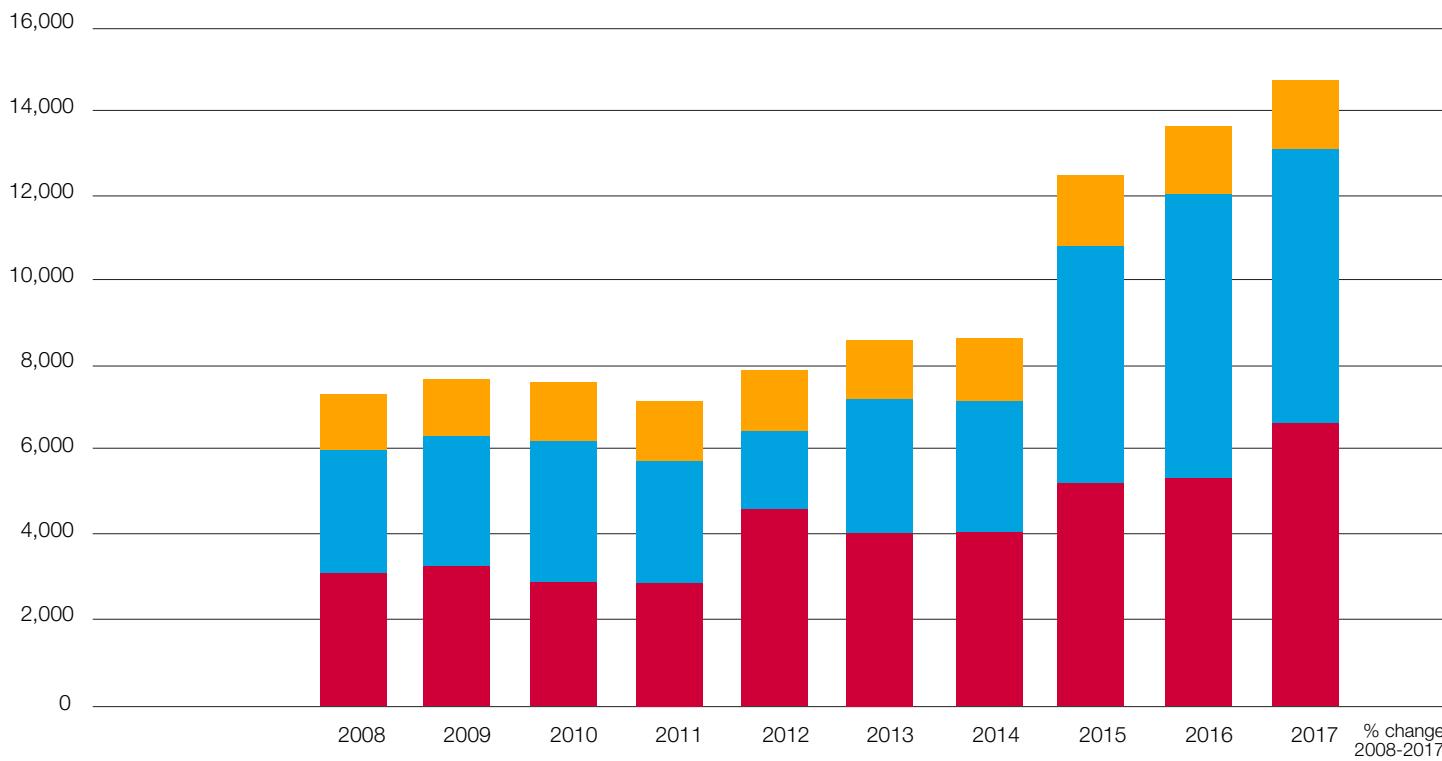
See notes to Table 1.

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**

£ million (2017 pounds)



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.

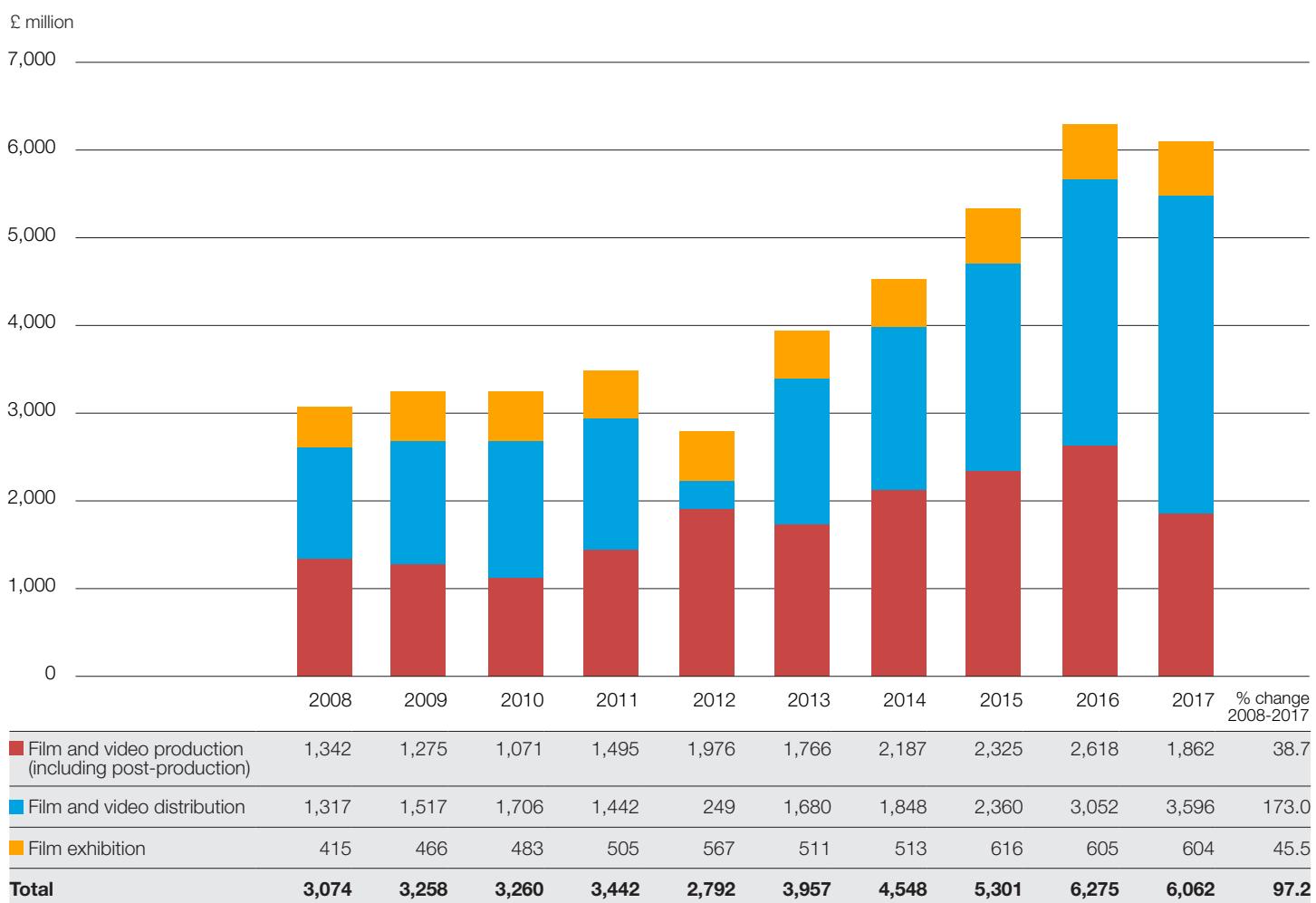
## FILM INDUSTRY CONTRIBUTION TO GDP, 2008-2017

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**



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**

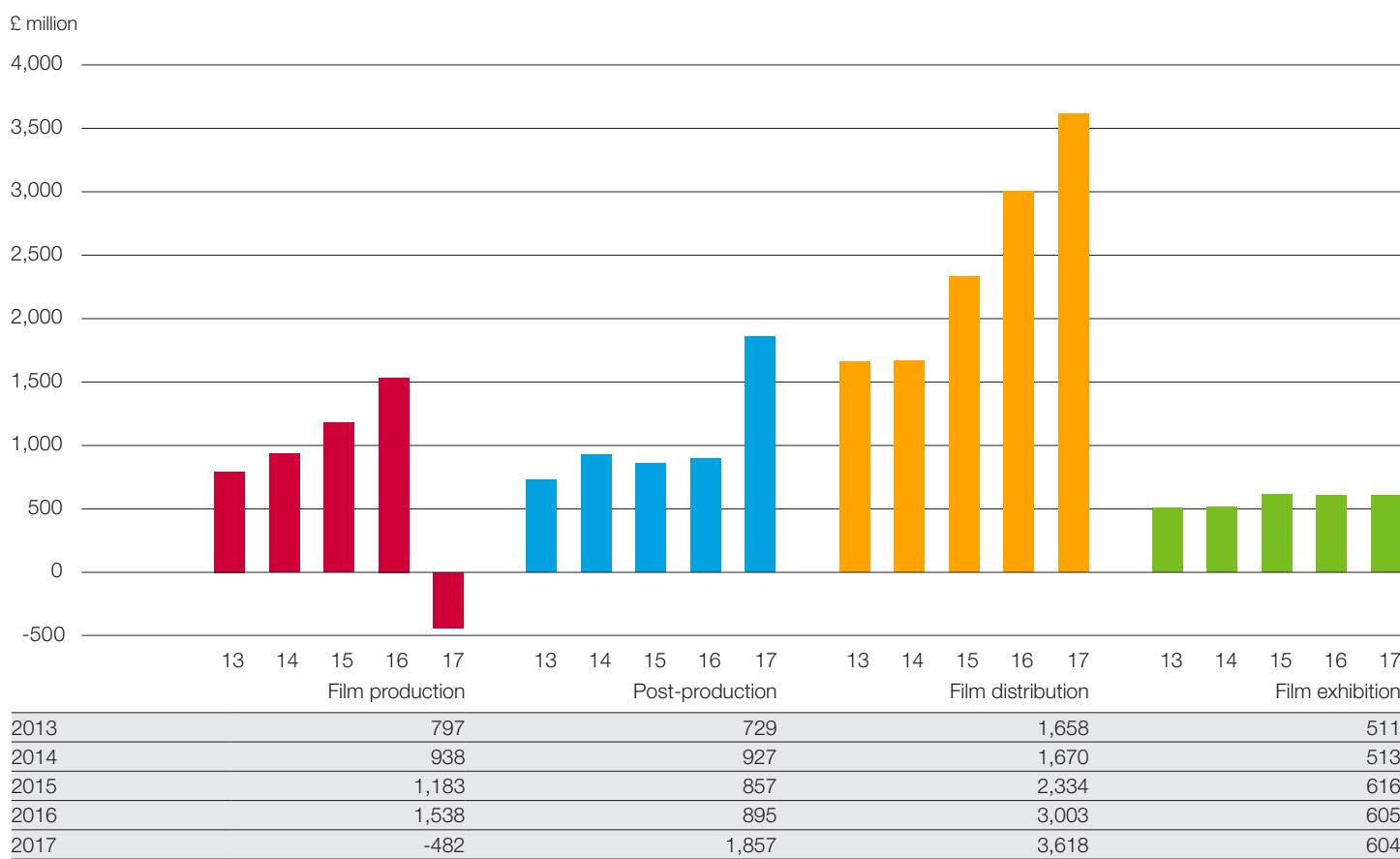
Sub-sector	GVA (£ million)	% of total
Film production	-482	-8.0
Video production	487	8.0
Film, video and TV post-production	1,857	30.6
Film distribution	3,618	59.7
Video distribution	-22	-0.4
Film exhibition	604	10.0
<b>Sector total</b>	<b>6,062</b>	<b>100.0</b>

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**

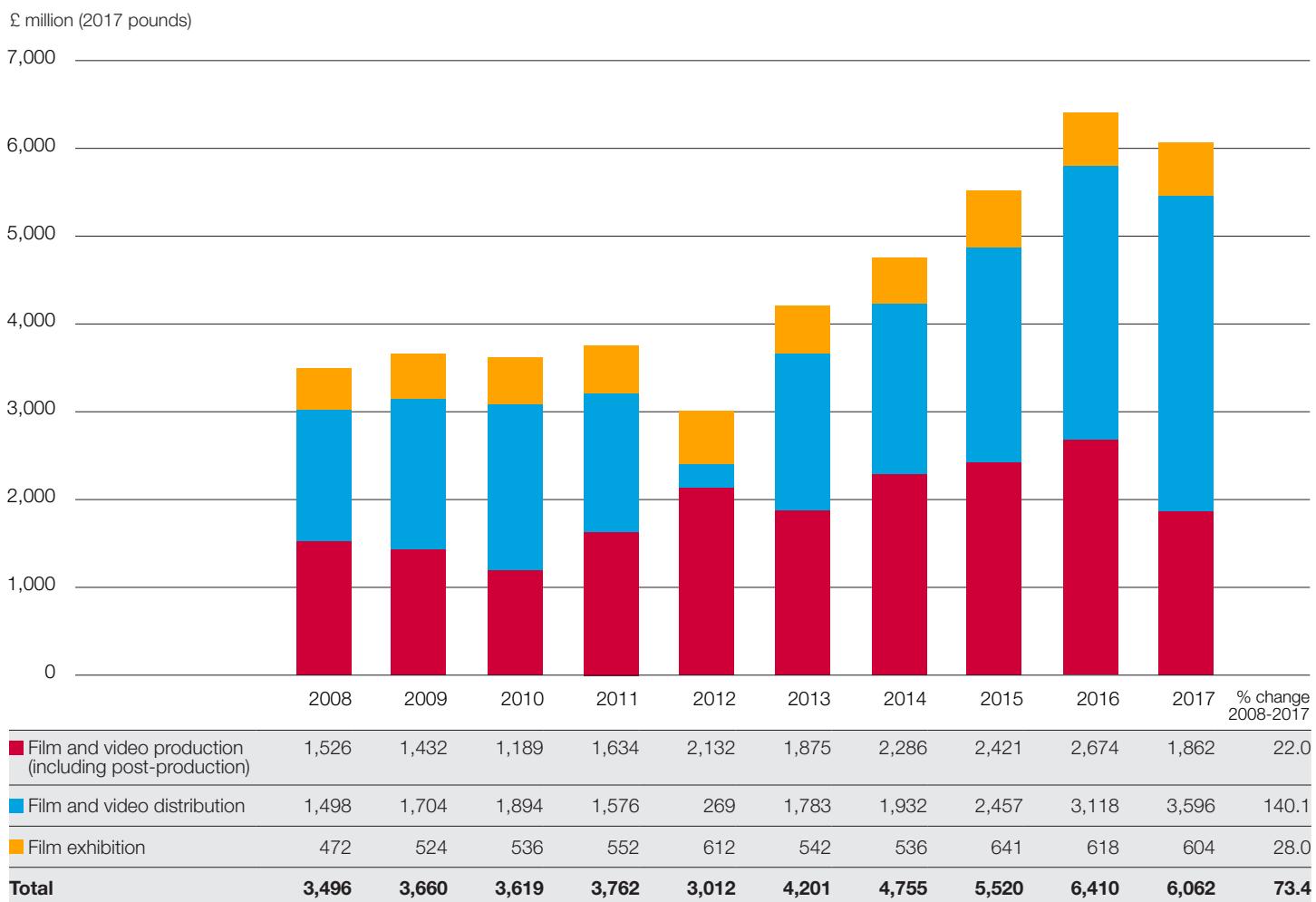


Source: Office for National Statistics Annual Business Survey

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**



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 (5913).

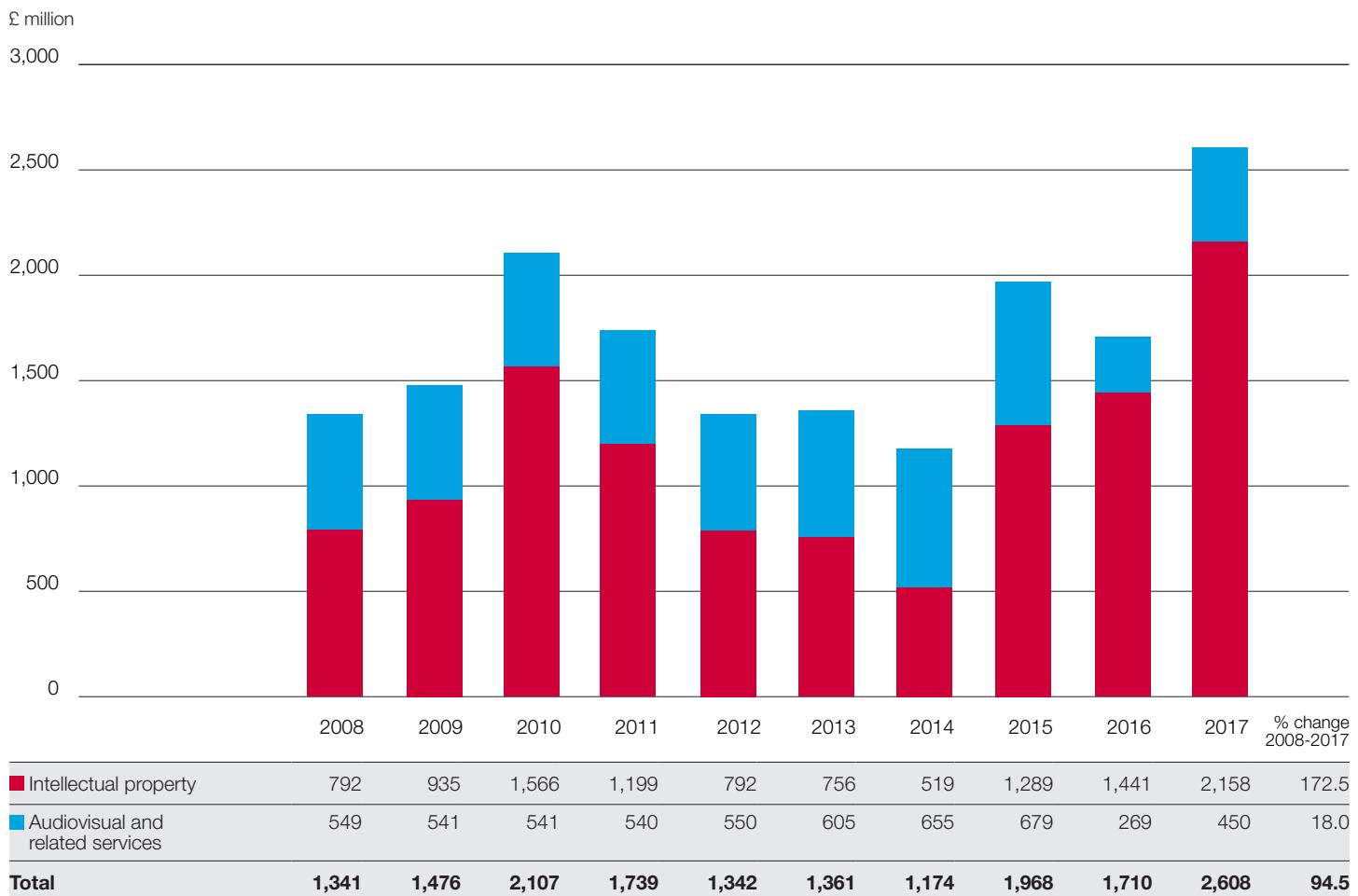
For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

## 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**



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.

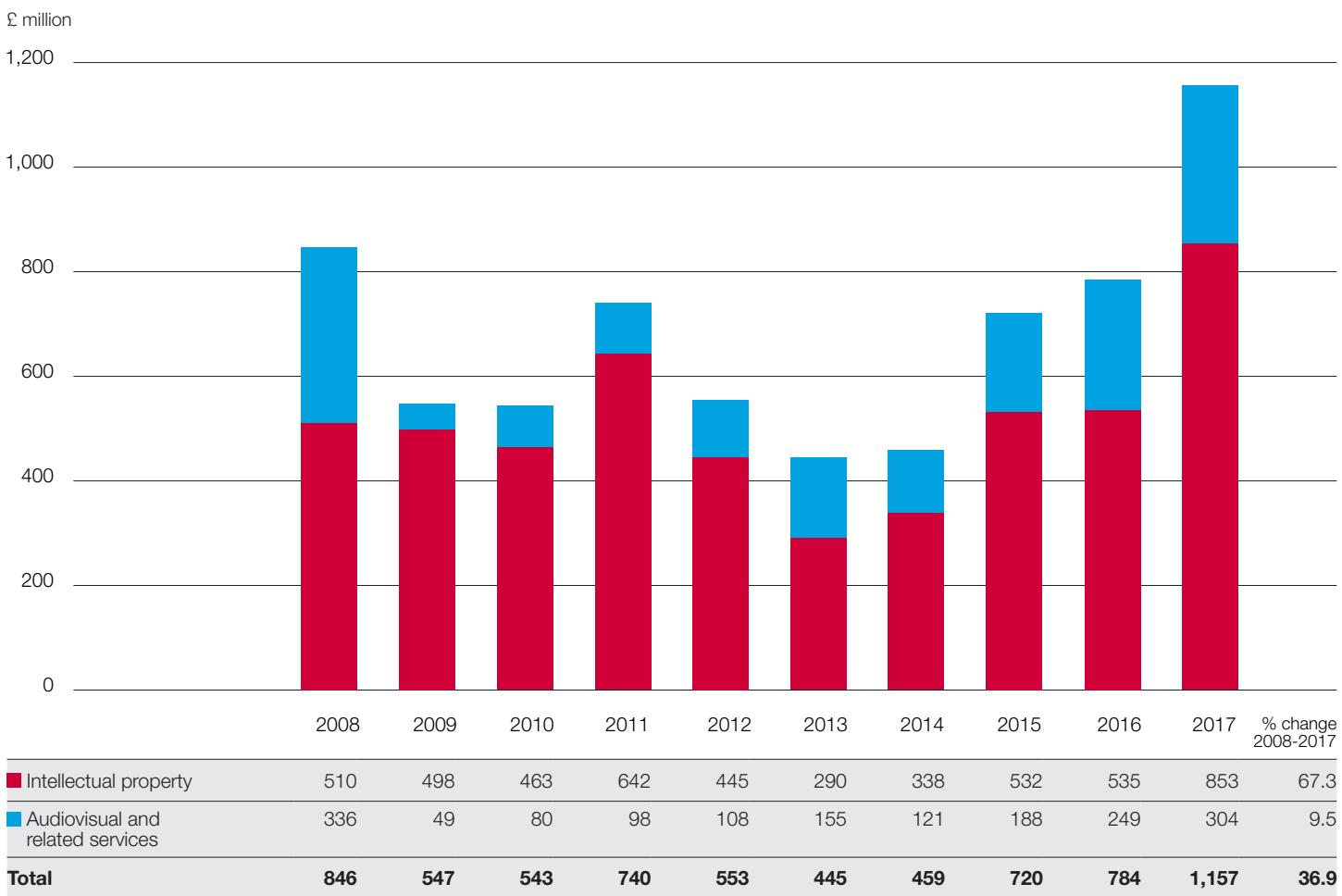
This chart shows the results for film companies only. Import and export data for 2008 is derived from the Office for National Statistics (ONS) Film and Television Survey which was a sample survey with a high response rate (87%) of companies in the Inter-Departmental Business Register in the SIC codes 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**



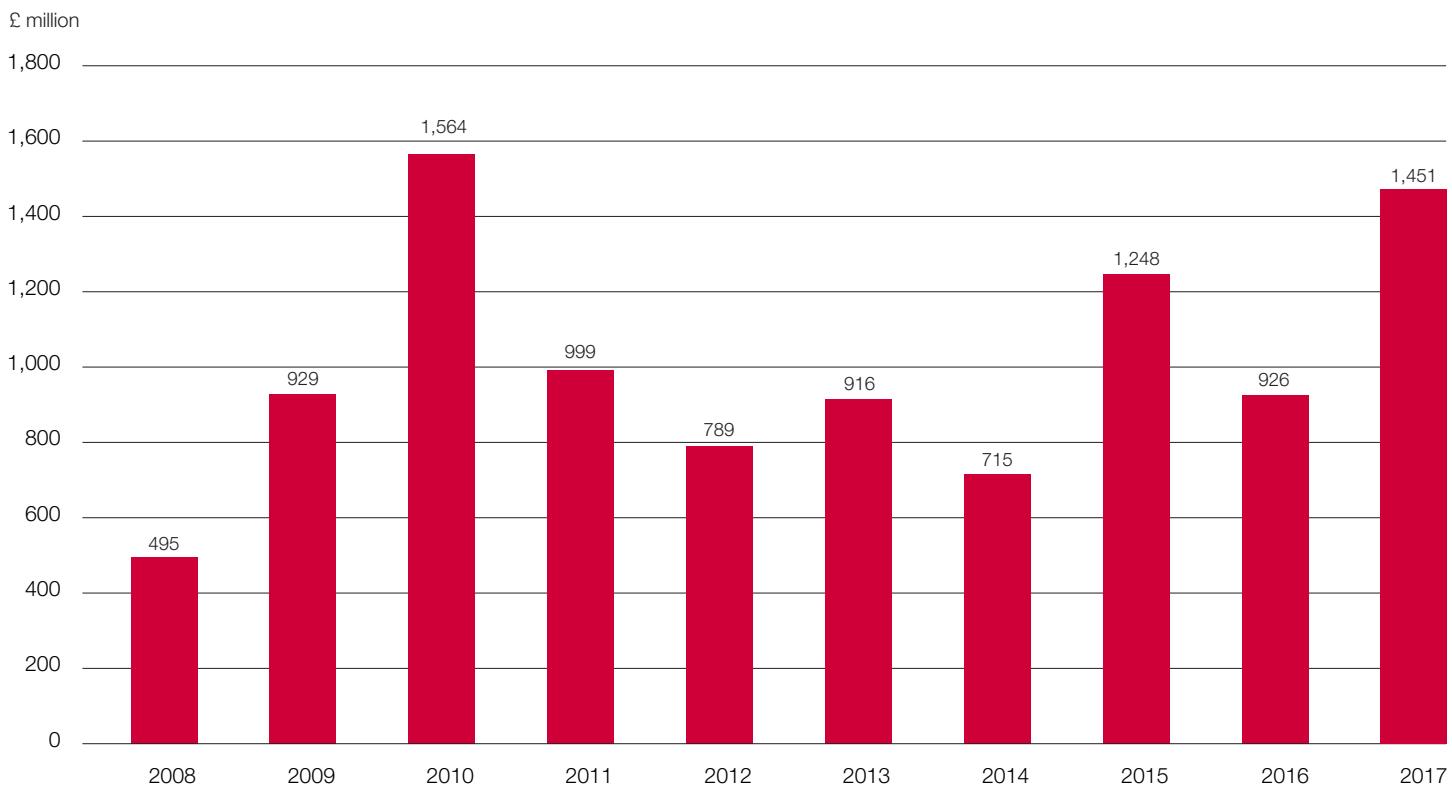
Source: Office for National Statistics Annual Survey of International Trade in Services

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.

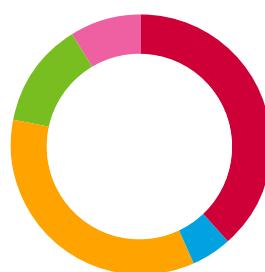
## FILM EXPORT MARKETS

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 (34.7%). 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



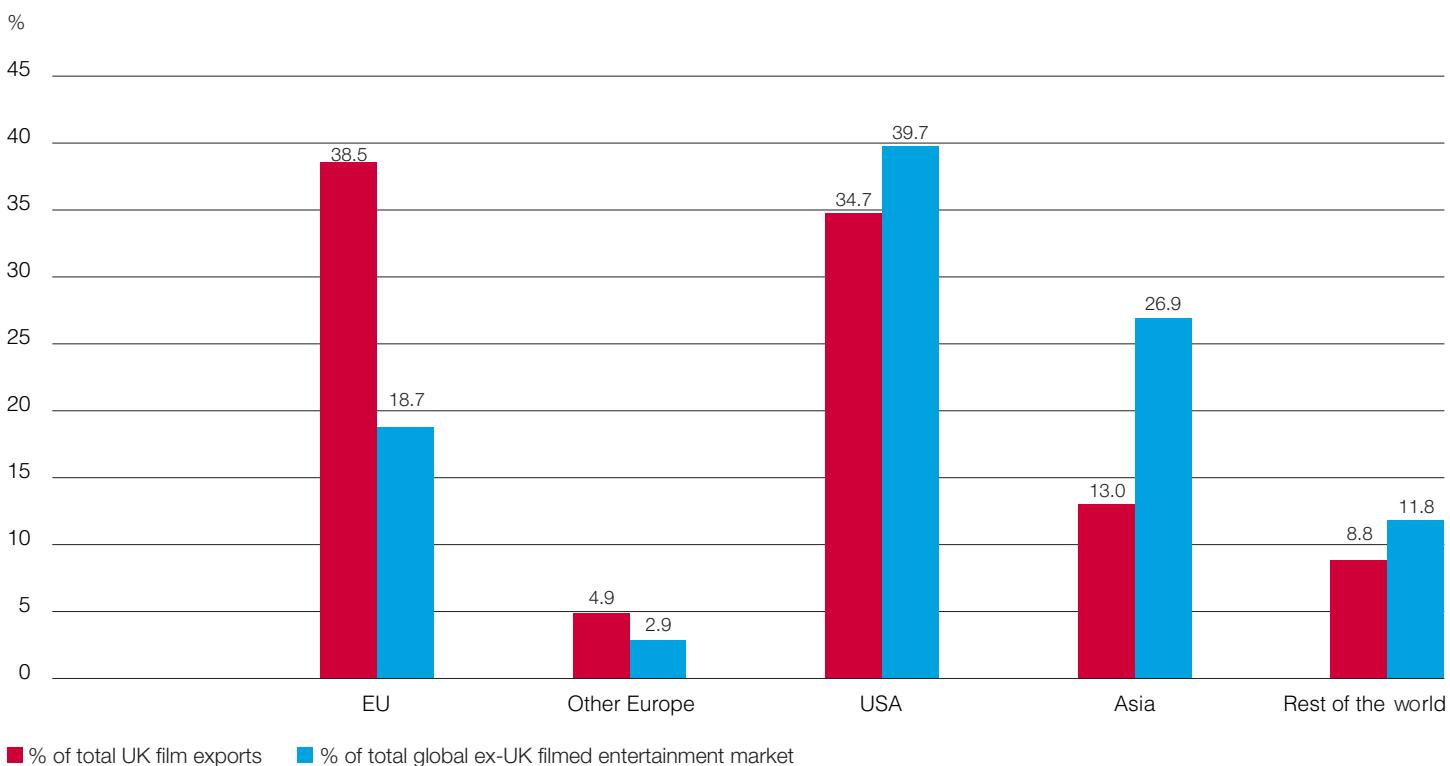
## UK FILM EXPORTS COMPARED WITH THE GLOBAL MARKET FOR FILMED ENTERTAINMENT

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**



■ % of total UK film exports   ■ % of total global ex-UK filmed entertainment market

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
<b>Total</b>	<b>1,756.6</b>	<b>709.6</b>	<b>1,047.0</b>	<b>100.0</b>

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
<b>Total</b>	<b>11,455</b>	<b>12,745</b>	<b>13,980</b>	<b>15,200</b>	<b>15,595</b>	<b>36.1</b>
<b>UK all industries</b>	<b>2,360,535</b>	<b>2,449,415</b>	<b>2,554,510</b>	<b>2,668,810</b>	<b>2,669,440</b>	<b>13.1</b>

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**

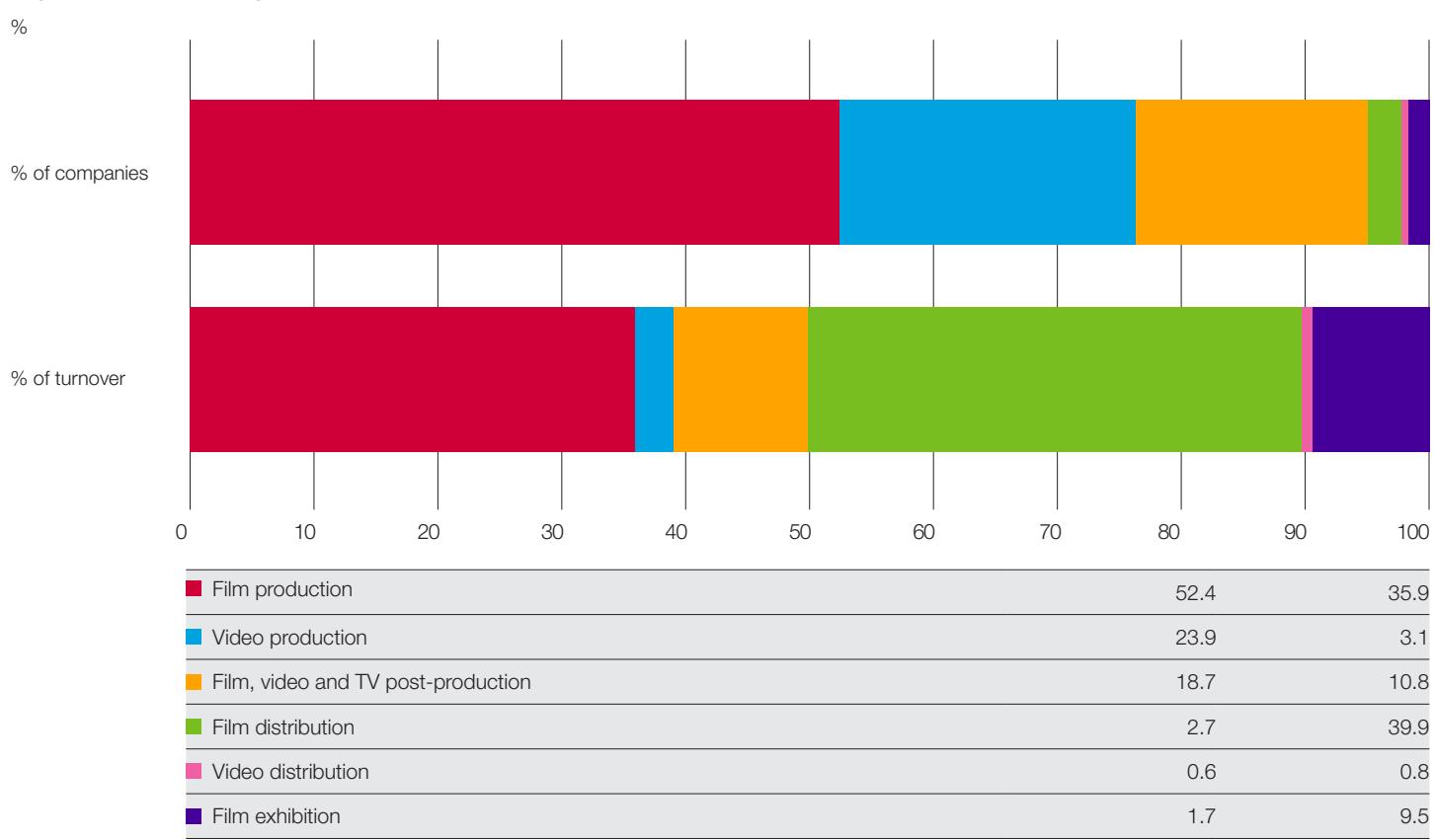
Sub-sector	2014	2015	2016	2017	2018	Growth 2014-2018 (%)
Film production	2,968.1	2,967.3	3,833.1	4,509.4	6,102.6	105.6
Video production	301.6	357.1	397.6	477.4	534.5	77.2
Film, video and TV post-production	1,389.3	1,477.6	1,309.1	1,800.6	1,844.1	32.7
Film distribution	2,976.4	2,776.2	4,306.2	4,871.3	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
<b>Total</b>	<b>9,125.1</b>	<b>9,105.2</b>	<b>11,484.4</b>	<b>13,442.6</b>	<b>17,013.9</b>	<b>86.5</b>

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**



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
<b>Total</b>	<b>8,165</b>	<b>100.0</b>	<b>6,102.6</b>	<b>100.0</b>

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
<b>Total</b>	<b>2,915</b>	<b>100.0</b>	<b>1,844.1</b>	<b>100.0</b>

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
<b>Total</b>	<b>420</b>	<b>100.0</b>	<b>6,788.4</b>	<b>100.0</b>

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
<b>Total</b>	<b>270</b>	<b>100.0</b>	<b>1,614.9</b>	<b>100.0</b>

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
<b>UK</b>	<b>8,165</b>	<b>100.0</b>	<b>2,915</b>	<b>100.0</b>	<b>420</b>	<b>100.0</b>	<b>270</b>	<b>100.0</b>	<b>11,770</b>	<b>100.0</b>

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
<b>UK</b>	<b>6,103</b>	<b>100.0</b>	<b>1,844</b>	<b>100.0</b>	<b>6,788</b>	<b>100.0</b>	<b>1,615</b>	<b>100.0</b>	<b>16,350</b>	<b>100.0</b>

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.



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