Statistical Yearbook 2021

Welcome to the 2021 BFI Statistical Yearbook. Compiled by the Research and Statistics Unit, this Yearbook presents the most comprehensive picture of film in the UK and the performance of British films abroad during 2020. This publication is one of the ways the BFI delivers on its commitment to evidence-based policy for film. We hope you enjoy this Yearbook and find it useful.

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

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

The BFI Board of Governors is chaired by Tim Richards.

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THE BOX OFFICE 2020

Cover image: *Mr. Jones* courtesy of Signature Entertainment

FACTS IN FOCUS

The year was defined by the onset of the COVID-19 pandemic, which resulted in the closure of UK cinemas in late March, as such 2020 was an unprecedented year for the UK box office.

- 2020 saw substantial disruption from the COVID-19 pandemic with revenues and admissions sharply down as cinemas closed their doors during multiple national lockdowns.
- UK cinema admissions were 44 million, the lowest on record.
- UK box office receipts in 2020 were £307 million, down 76% on 2019.
- A total of 381 films were released in the UK and Republic of Ireland, less than half the number released in 2019.
- UK films, including co-productions, accounted for 25% of releases and 47% of the market by value.
- The box office share of UK independent films was 14.2%, up from 12.9% in 2019, though total revenues were substantially down.
- The top 100 films earned 98% of the gross box office, the highest share of the last decade.

The box office 2020

Admissions

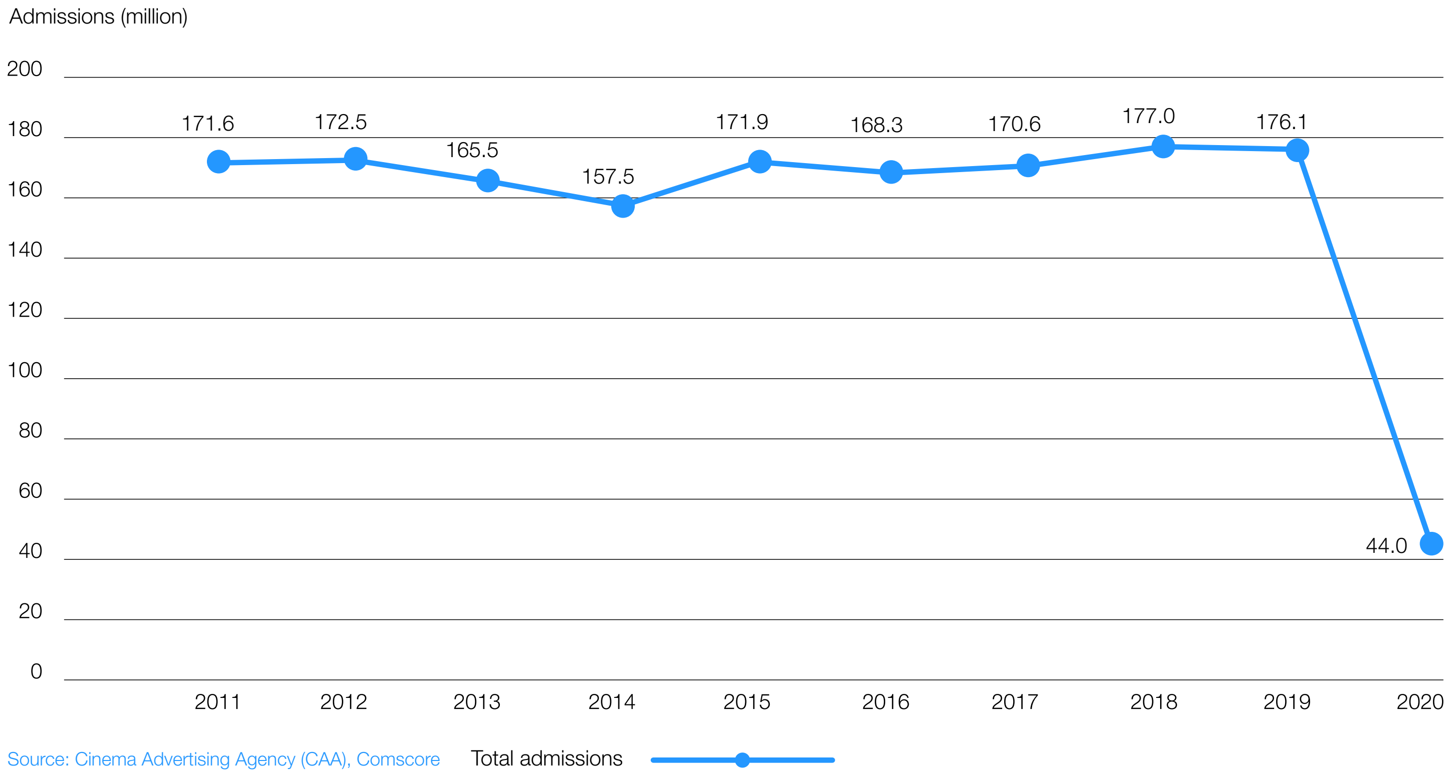
The outbreak of the COVID-19 pandemic resulted in a massive drop in the number of tickets sold in the UK with just 44 million cinema tickets sold in the UK in 2020 (Figure 1). This is a 75% decline on 2019 and the lowest figure since continuous records began in 1935, being 10 million fewer admissions than the previous low of 54 million in 1984.

Across the world, there were substantial drops in cinema admissions with the average decline in the 15 largest markets in 2019 being a 71% drop. Japan was the only market in the 2019 top 15 to have a decline of less than 50%.

Of the major European territories, Russia reported the smallest drop at 59.6% followed by Germany (-67.9%), France (-69.4%), and Spain (-73.1%). The UK had the largest drop of the largest European markets at -75%.

Of the three markets that recorded over a billion admissions in 2019, China saw the smallest decrease (-68.3%). There were similar levels of decrease in both USA and Canada (-80.2%) and India (-81.0%) The biggest decrease in the 15 largest territories was recorded in Mexico where there was a decrease of 82.3%.

Figure 1 Annual UK cinema admissions, 2011-2020



Source: Cinema Advertising Agency (CAA), Comscore

Table 1 15 largest markets by admissions 2018, 2019 and 2020 (ranked by 2019 admissions)

Territory	Admissions 2018 (million)	Admissions 2019 (million)	Admissions 2020 (million)	+/- 2019 (%)
China	1,716,985	1,727,000	548,000	-68
India	1,560,000	1,460,000	277,655	-81
USA	1,215,022	1,163,000	226,336	-81
Mexico	332,000	350,100	62,000	-82
South Korea	216,390	226,680	61,500	-73
Russia	200,200	219,400	88,700	-60
France	197,100	209,200	64,100	-69
Japan	169,210	194,910	106,137	-46
Brazil	163,464	176,433	38,837	-78
UK	177,001	176,054	43,981	-75
Indonesia	135,131	140,000	47,214	-66
Germany	105,400	118,611	38,094	-68
Spain	97,700	104,900	28,200	-73
Italy	85,903	97,587	28,140	-71
Philippines	88,000	92,000	28,900	-69

Source: CAA, BFI, European Audiovisual Observatory, OMDIA

Note: Due to the unprecedented nature of 2020 admissions the analysis focuses on the 15 largest markets of 2019 to illustrate the impact COVID-19 had on comparable large markets

Table 2 shows the breakdown of UK admissions for 2020 by month. The first two months of the year were unaffected by the COVID-19 pandemic and continued the strong trend for admissions seen in 2019. January saw the highest admissions for the year with 16.5 million, as audiences were attracted by Oscar® nominated films such as *1917* and *Parasite*, as well as releases from late 2019 including *Star Wars: The Rise of Skywalker*. The January admissions were the third highest for any January since the turn of the millennium. February saw a 19% increase in admissions year-on-year. However, by the second week of March the effects of the COVID-19 pandemic started to become apparent, and the government introduced a full lockdown on 23rd March, requiring all cinemas to close.

The rest of the year was heavily affected by the COVID-19 pandemic, with 20 weeks directly affected by national lockdowns. Cinemas remained closed until July when a gradual reopening began, albeit with social distancing regulations in place limiting audience sizes. August, September and October saw admissions of between 2 and 3 million, all of which are 75-86% decreases compared to the previous year. While major studio films were released during these months (including Christopher Nolan's *Tenet*), drawing modest numbers of cinemagoers, many planned releases were delayed into 2021 or moved onto Video On Demand platforms. New lockdowns were introduced in November, and meant most UK cinemas were closed through the majority of the month. While many cinemas did reopen briefly before the end of the year, low levels of admissions continued into December, and the year ended with all cinemas closed due to further national lockdowns.

Over 31 million cinema admissions occurred in the first two months of the year, 20% up on 2019 (26 million). However they, along with the first weeks of March, ended up accounting for 82% of the total annual admissions for the year (these months accounted for 21% in 2019). The final nine months of 2020 accounted for 8.1 million admissions.

Table 2 Monthly UK cinema admissions, 2016- 2020

Admissions (million)	2016	2017	2018	2019	2020	% change on 2019
January	14.0	15.0	16.2	13.7	16.5	20.4
February	15.4	16.5	16.1	12.2	14.5	19.0
March	13.4	16.2	13.5	11.4	4.8	-57.9
April	13.1	15.6	15.5	16.0	-	-100.0
May	12.5	11.3	13.7	16.6	-	-100.0
June	10.7	9.6	10.4	13.9	-	-100.0
July	16.6	17.8	15.6	18.7	0.4	-97.9
August	18.1	14.5	19.2	15.6	2.1	-86.7
September	11.7	10.8	10.1	11.0	2.7	-75.8
October	15.2	12.1	16.1	16.3	2.2	-86.6
November	12.4	14.1	14.9	12.2	0.3	-97.5
December	15.2	17.2	15.7	18.5	0.5	-97.2
Total	**168.3**	**170.6**	**177.0**	**176.1**	**44.0**	**-75.0**

Source: CAA, Comscore

Image: *Emma* © 2019 Focus Features, LLC. All rights reserved. Courtesy of Universal Studios Licensing LLC

Timeline of national responses to the coronavirus pandemic, 2020

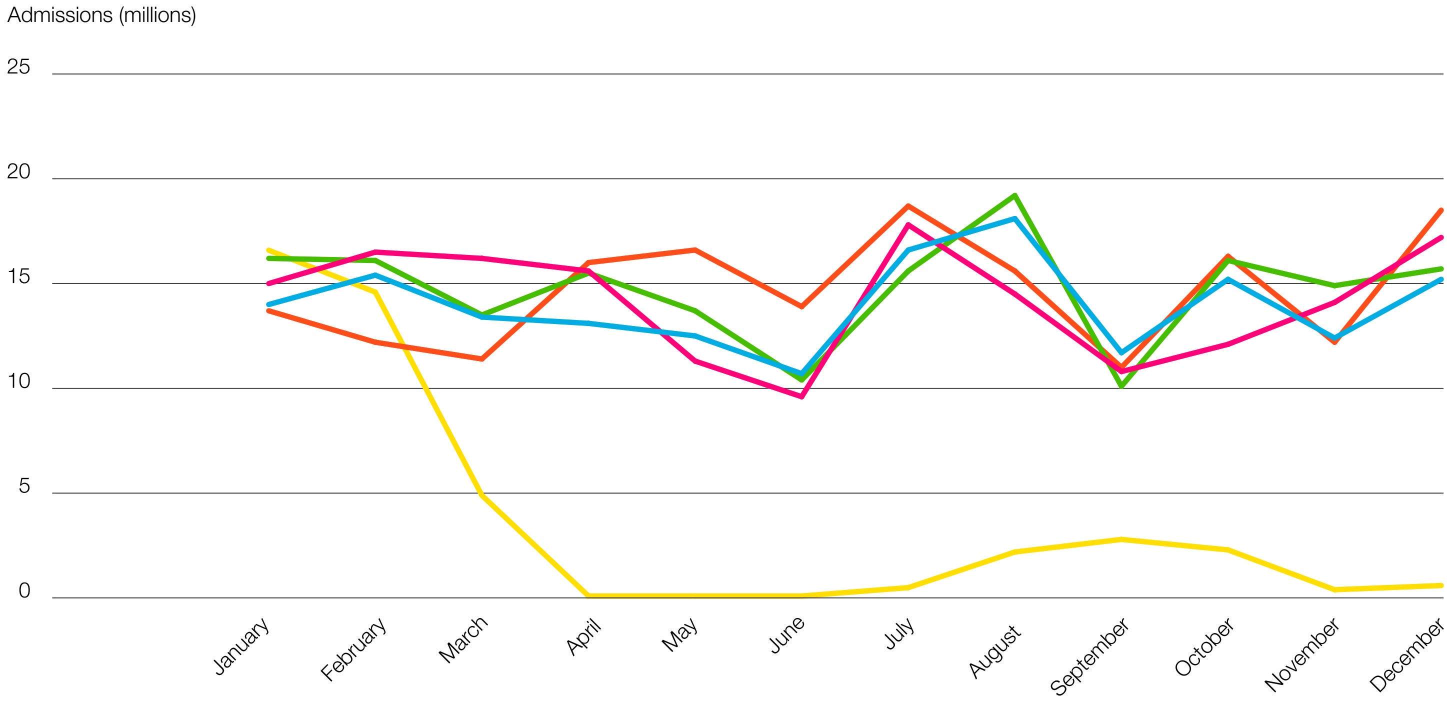
This table shows the timeline of the main points in the UK response to the COVID-19 pandemic in 2020. This list is non-exhaustive, and does not reflect many of the regional restrictions which were put in place.

Date	Nationwide responses to the pandemic
16/03/2020	UK Prime Minister addresses the country saying “now is the time for everyone to stop non-essential contact and travel” Most cinemas in the UK and the Republic of Ireland shut, the remaining close over the next few days
23/03/2020	UK PM announces the first lockdown in the UK, requiring people to “stay at home”
10/05/2020	UK PM announces a conditional plan for lifting lockdown
29/06/2020	Cinemas in the Republic of Ireland begin re-opening
03/07/2020	Cinemas in England begin re-opening, with some regional restrictions still in place
11/07/2020	Cinemas in Northern Ireland begin re-opening
15/07/2020	Cinemas in Scotland begin re-opening
03/08/2020	Cinemas in Wales begin re-opening
26/08/2020	*Tenet* released - a majority of chain cinemas are now open
07/10/2020	Cinemas in the Republic of Ireland close
09/10/2020	Cineworld shuts all cinemas until further notice
17/10/2020	Cinemas in Northern Ireland close
23/10/2020	Cinemas in Wales close
02/11/2020	Many cinemas in Scotland close due to regional restrictions
05/11/2020	Cinemas in England close
09/11/2020	Cinemas in Wales begin re-opening
01/12/2020	Cinemas in the Republic of Ireland begin re-opening
02/12/2020	Cinemas in England begin re-opening, with some regional restrictions still in place
04/12/2020	Cinemas in Wales close
11/12/2020	Cinemas in Northern Ireland begin re-opening
16/12/2020	*Wonder Woman 1984* released
25/12/2020	Cinemas in Northern Ireland, the Republic of Ireland, Scotland and Wales close
31/12/2020	Cinemas in England close

Source: BFI

Looking at monthly admissions since 2016, Figure 2 shows the dramatic drop off in March, along with the complete lack of admissions during the national lockdown. Audiences started to venture back between August and October, however admissions remained low, driven by concerns over the indoor transmission of COVID-19, and a lack of major theatrical releases. New national lockdowns in November and December resulted in very low admissions at the end of the year.

Figure 2 Monthly UK cinema admissions, 2016-2020



	January	February	March	April	May	June	July	August	September	October	November	December
2016	14.0	15.4	13.4	13.1	12.5	10.7	16.6	18.1	11.7	15.2	12.4	15.2
2017	15.0	16.5	16.2	15.6	11.3	9.6	17.8	14.5	10.8	12.1	14.1	17.2
2018	16.2	16.1	13.5	15.5	13.7	10.4	15.6	19.2	10.1	16.1	14.9	15.7
2019	13.7	12.2	11.4	16.0	16.6	13.9	18.7	15.6	11.0	16.3	12.2	18.5
2020	16.5	14.5	4.8	-	-	-	0.4	2.1	2.7	2.2	0.3	0.5

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2021.

Table 3 shows how the 2020 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Overall, the pattern of national and regional admissions has remained largely unchanged over the last decade and the COVID affected year of 2020 is no different. While different nations and regions may have had additional lockdown periods or stricter rules around social distancing, the effect of this is minimal as 82% of the total admissions in 2020 were generated in the early months of the year.

Whilst admissions were significantly down everywhere, the UK's most populous region, London, accounted for the highest share of admissions (23.3%) followed by the South and South East and the Midlands (with 12.1% and 11.4% respectively). In terms of average admissions per head of population, cinema-going was highest in London, Northern Ireland, Central Scotland and the East of England and lowest in Wales and Border regions.

Table 3 Cinema admissions by ISBA TV region, 2020

Region	Admissions (million)	%	Population (million)	Admissions per person
London	10.2	23.3	13.7	0.75
South and South East	5.3	12.1	7.7	0.70
Midlands	5.0	11.4	9.1	0.55
North West	4.6	10.4	7.2	0.64
Yorkshire	3.8	8.7	6.5	0.58
East of England	3.6	8.1	5.0	0.71
Central Scotland	2.8	6.3	3.9	0.72
Wales	1.7	3.9	3.1	0.54
North East	1.7	3.9	2.8	0.61
West	1.6	3.7	2.5	0.66
Northern Ireland	1.4	3.1	1.9	0.73
South West	1.1	2.6	1.8	0.64
Northern Scotland	0.8	1.8	1.3	0.62
Border	0.3	0.7	0.6	0.49
Total	**44.0**	**100.0**	**67.1**	**0.66**

Source: CAA, Comscore

Notes:

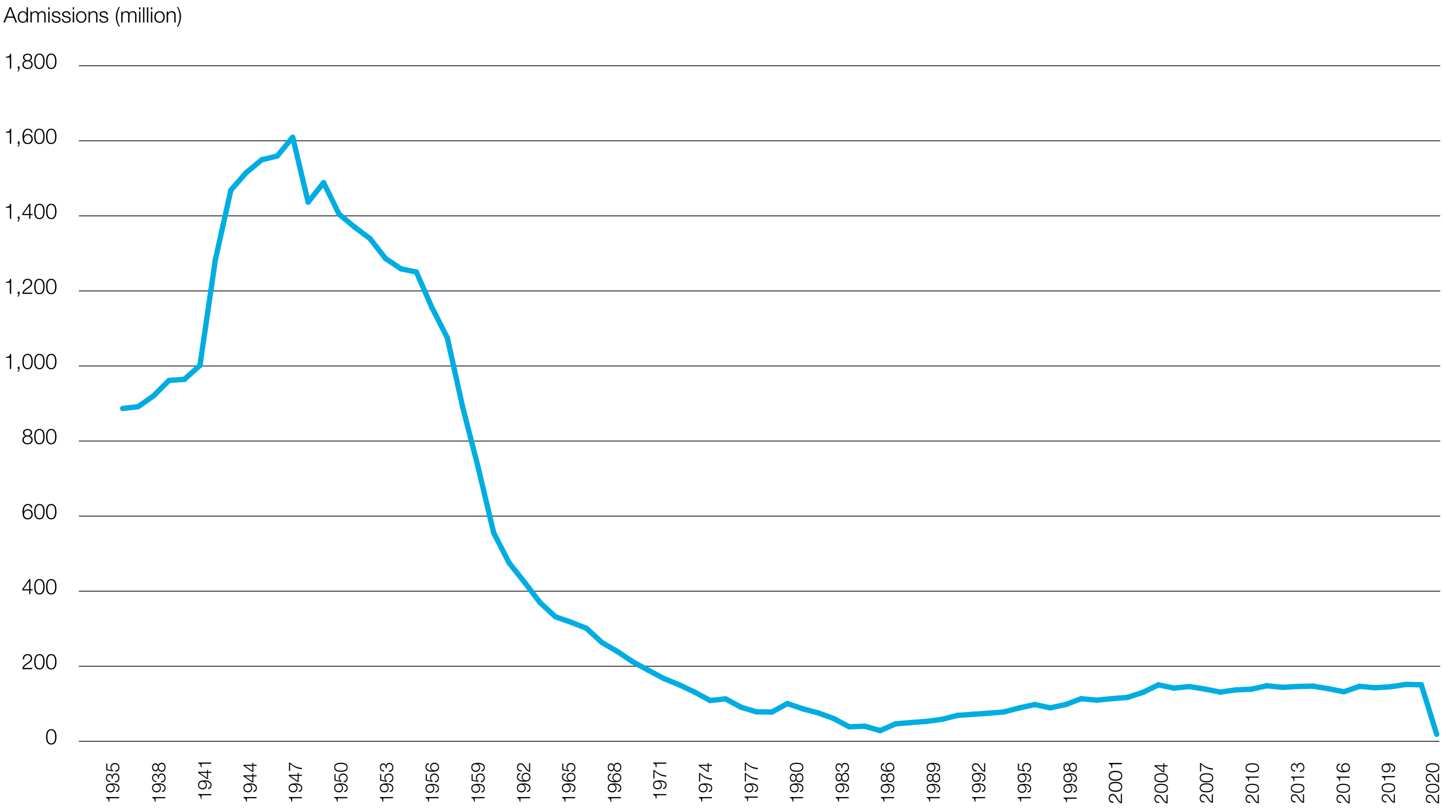
Figures/percentages may not sum to totals due to rounding.

The difference in the share of admissions between Midlands and South and South East is explained when admissions figures are shown to two decimal places: Midlands (21.05 million), and South and South East (20.97 million).

Figure 3 puts UK admissions in a longer term perspective and shows the dramatic impact of COVID-19 marking 2020 as the year with the lowest total admission since continuous records began in 1935.

Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as new leisure activities became available. The largest competition came from the growth of television, which allowed audiences to satisfy their appetite for screen entertainment in the comfort of their own homes. As cinema admissions fell so did the total number of screens, which led to further falling demand and more cinema closures. By the 1980s the number and quality of the remaining cinemas were at an all-time low. The introduction of the VCR in the same decade had a further negative impact on admissions and the previous nadir was reached in 1984 with cinema-going down to an average of one visit per person per year. However, the introduction of multiplex cinemas to the UK from 1985 onwards reversed the trend and ushered in a new period of growth which saw admissions gradually returning to levels last seen in the early 1970s. The COVID-19 pandemic brought a drastic break in this resurgence, with 44 million admissions being the lowest on record.

Figure 3 Annual UK admissions, 1935-2020



Year	Admissions (million)
1935	912.3
1936	917.0
1937	946.0
1938	987.0
1939	990.0
1940	1,027.0
1941	1,309.0
1942	1,494.0
1943	1,541.0
1944	1,575.0
1945	1,585.0
1946	1,635.0
1947	1,462.0
1948	1,514.0
1949	1,430.0
1950	1,395.8
1951	1,365.0
1952	1,312.1
1953	1,284.5
1954	1,275.8
1955	1,181.8
1956	1,100.8
1957	915.2
1958	754.7
1959	581.0
1960	500.8
1961	449.1
1962	395.0
1963	357.2
1964	342.8
1965	326.6
1966	288.8
1967	264.8
1968	237.3
1969	214.9
1970	193.0
1971	176.0
1972	156.6
1973	134.2
1974	138.5
1975	116.3
1976	103.9
1977	103.5
1978	126.1
1979	111.9
1980	101.0
1981	86.0
1982	64.0
1983	65.7
1984	54.0
1985	72.0
1986	75.5
1987	78.5
1988	84.0
1989	94.5
1990	97.4
1991	100.3
1992	103.6
1993	114.4
1994	123.5
1995	114.6
1996	123.5
1997	138.9
1998	135.2
1999	139.1
2000	142.5
2001	155.9
2002	175.9
2003	167.3
2004	171.3
2005	164.7
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6
2012	172.5
2013	165.5
2014	157.5
2015	171.9
2016	168.3
2017	170.6
2018	177.0
2019	176.1
2020	44.0

Source: BFI, CAA, Comscore

UK box office earnings

According to Comscore, the total UK box office gross for all titles on release in 2020 was £307 million, a quarter of the revenues achieved in 2019 (Table 4).

Table 4 UK box office trends, 2011-2020

Year	Box office gross (£ million)	Change on previous year %	Change since 2011 %
2011	1,040	-	-
2012	1,099	5.7	5.7
2013	1,083	-1.5	4.1
2014	1,063	-1.8	2.2
2015	1,242	16.8	19.4
2016	1,228	-1.1	18.1
2017	1,279	4.2	23.0
2018	1,282	0.2	23.3
2019	1,254	-2.2	20.6
2020	307	-75.5	-70.5

Source: Comscore

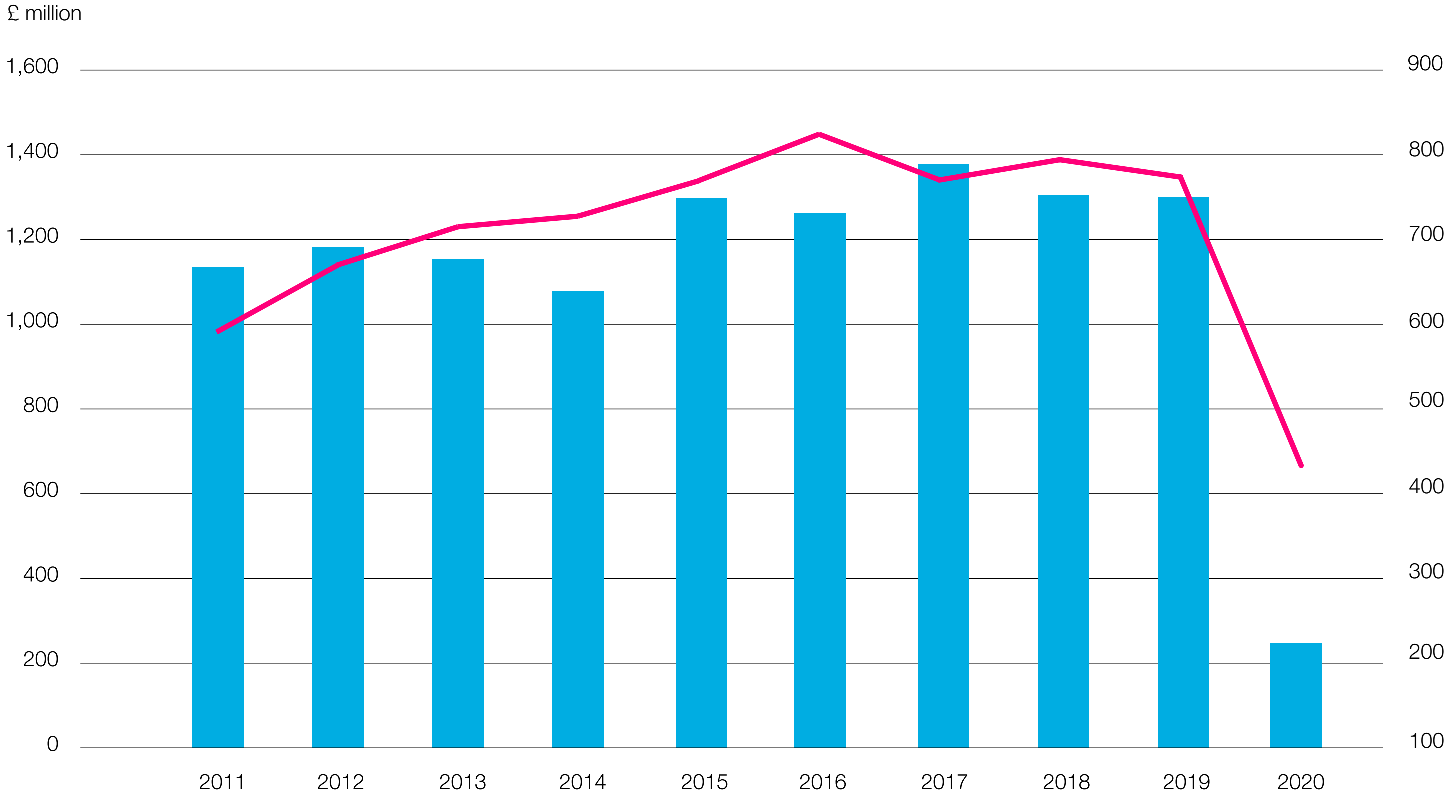
Film releases and box office revenues in the UK and Republic of Ireland

In 2020, 381 films were released in the UK and Republic of Ireland, just under half the number of films released in 2019 (764). This equates to an average of just over seven releases per week (or 11 per week excluding weeks when cinemas were closed) compared with an average of just under 15 releases per week in 2019. These films generated £247 million in box office revenues at the UK and Republic of Ireland box office. (This figure differs from the £307 million quoted in Table 4, as that figure includes all titles on release, and is for the UK only.) The subsequent analysis in this chapter includes all films released in 2020, and to remain consistent with previous editions of the yearbook it includes revenues generated up to 18 February 2021, even though cinemas were mostly closed in the first two months of 2021.

Figure 4 shows the sharp drop in the number of films and box office revenue in 2020. The previous nine years showed an upward trend in both the number of films exhibited and theatrical earnings over the period.

The average revenue per release in 2020 was £600,000, which is substantially lower than in the previous nine years, where the average release generated about £1.7 million)

Figure 4 Revenues and releases at the UK and Republic of Ireland box office, 2011-2020

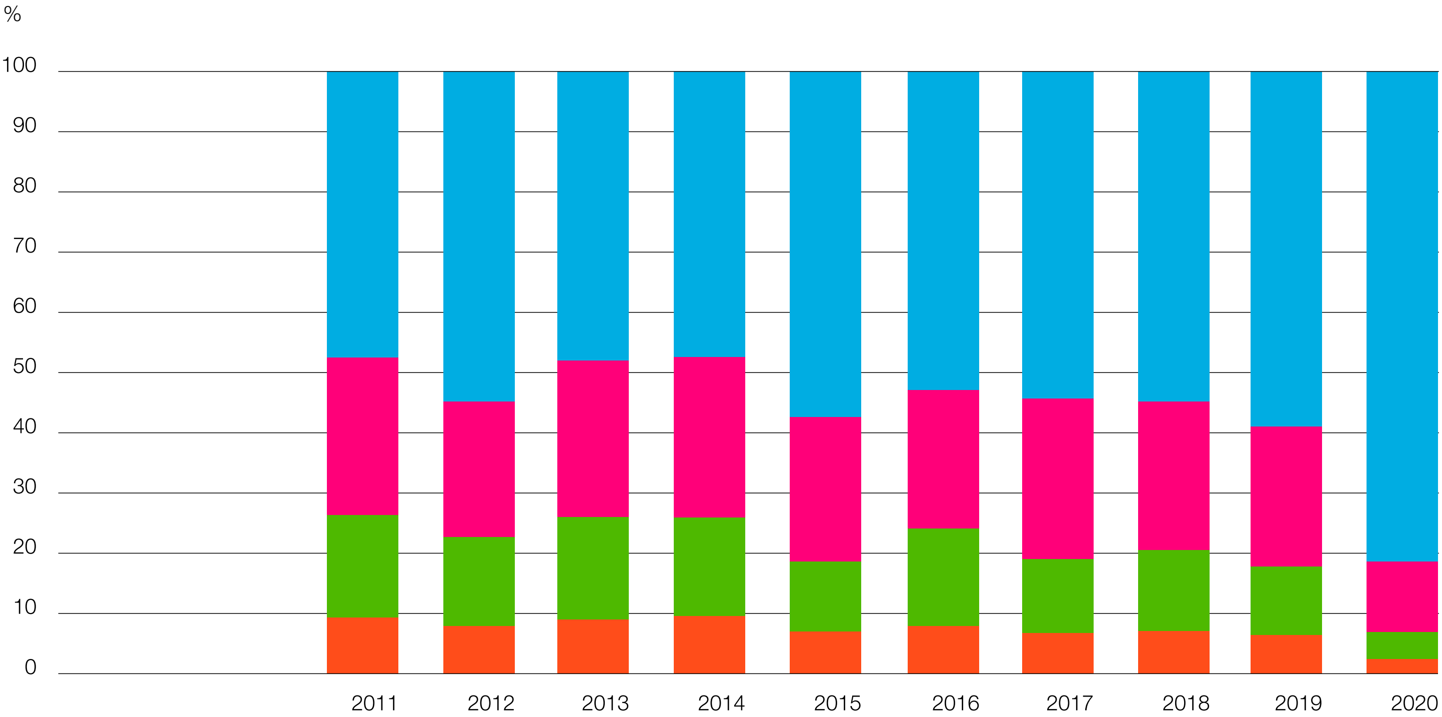


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Box office gross (£ million)	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9	1,304.8	1,300.9	246.9
Number of releases	558	647	698	712	759	821	760	787	764	381
Average revenue per release (£ million)	2.0	1.8	1.7	1.5	1.7	1.5	1.8	1.7	1.7	0.6

Source: Comscore, BFI RSU analysis
Note: Box office up to and including 18 February 2021, only includes new in-year releases.

The top 20 earning films of 2020 accounted for 81% of the total market, a substantial increase from 59% in 2019 (Figure 5). Of the top 20 earning films, 17 were released in the first quarter, with the top six films accounting for more than half the total box office for the year (although this includes *Tenet*, released in August). This occurred because not only were there fewer than usual releases in the latter part of the year, they also mostly underperformed at the box office, leaving the films released in Q1 to have an outsized share of the final box office. Consequently, the box office skews more heavily towards the top 20 than in previous years.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2011-2020

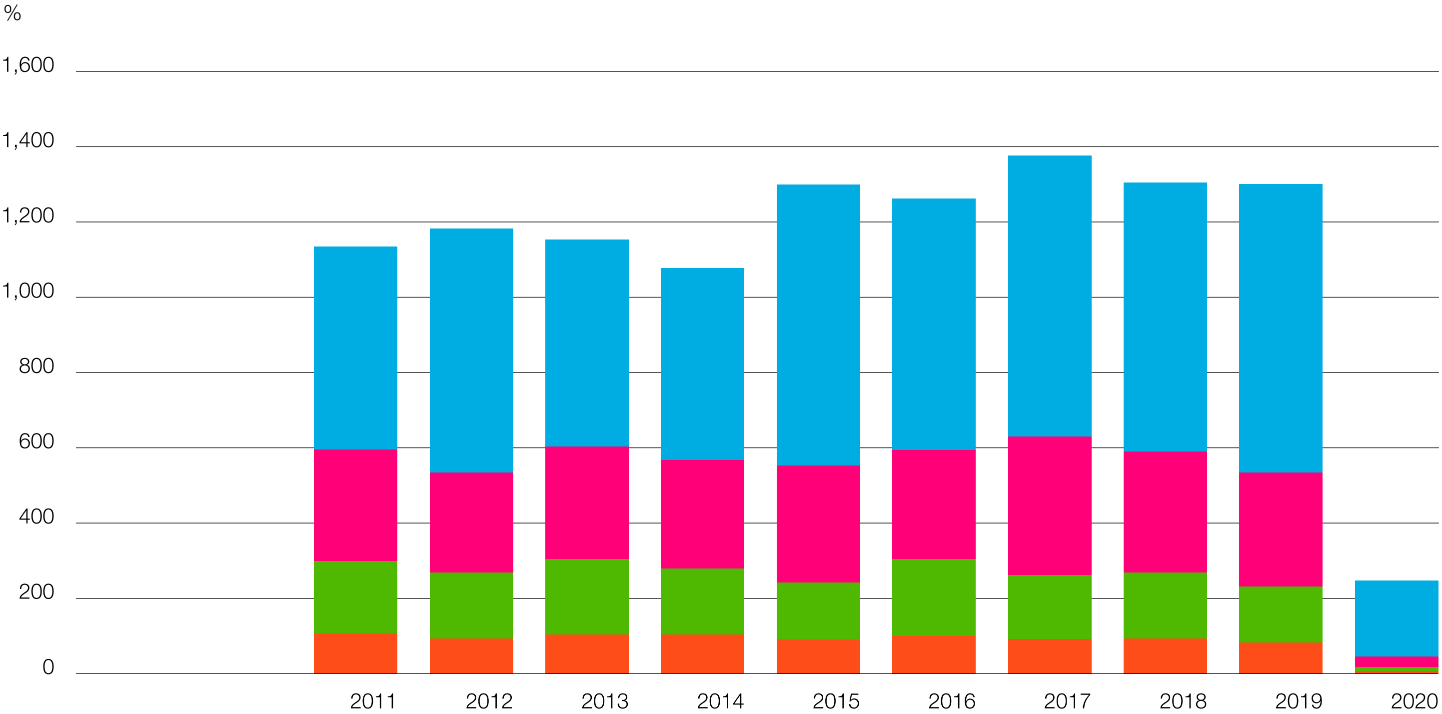


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
% share of top 20	47.5	54.8	48.0	47.4	57.4	52.9	54.3	54.8	59.0	81.4
% share of of 21-50	26.2	22.5	26.0	26.7	24.0	23.0	26.7	24.7	23.2	11.7
% share of 51-100	17.0	14.8	17.0	16.3	11.6	16.2	12.3	13.4	11.4	4.5
% share of rest	9.3	7.9	9.0	9.6	7.0	7.9	6.7	7.1	6.4	2.4

Source: Comscore, BFI RSU analysis
Note: Percentages may not sum to 100 due to rounding.

As Figure 6 shows the total box office gross generated in 2020 saw a dramatic drop off compared to the previous years, being roughly the equivalent of the box office generated by the films outside the Top 50 in the previous years of the last decade. More than 92% of the box office was generated by the top 50 films. The Top 6 films, of which 5 were released pre-pandemic, accounted for more than 50% of the total box office for the year.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Box office of top 20 (£ million)	539.3	647.9	551.1	510.7	745.6	667.7	747.1	714.9	767.2	200.9
Box office of 21-50 (£ million)	296.8	266.5	299.3	288.1	311.6	289.6	367.2	321.7	302.3	29.0
Box office of 51-100 (£ million)	192.8	174.9	199.3	175.5	150.3	204.5	170.0	175.1	148.5	11.1
Box office of rest (£ million)	105.6	92.9	104.0	103.5	90.9	100.2	92.2	93.1	82.9	5.9

Source: Comscore, BFI RSU analysis

Table 5 shows the large drop in box office revenue and number of films released in 2020 outside the Top 100. In 2020 £5.9 million was generated by the 281 films outside the top 100 with a median box office of £8,767, all figures being a drastic drop from 2019 (£83 million total, from 664 titles with a £26,767 median).

Table 5 Releases and revenues of films outside the top 100, 2011-2020

	Number of films	Gross box office (£ million)	Median box office (£)
2011	458	105.6	34,859
2012	547	92.9	22,073
2013	598	104.0	25,790
2014	612	103.5	22,027
2015	659	90.9	19,743
2016	721	100.2	16,790
2017	660	92.2	23,803
2018	687	93.1	22,154
2019	664	82.9	26,767
2020	281	5.9	8,948

Source: Comscore, BFI RSU analysis

Widest point of release

Table 6 outlines the number of films released in the UK and Republic of Ireland in 2020 by the number of sites at the widest point of release (WPR). Just nine films (2.4% of all releases) were simultaneously screened at over 600 sites in 2020, a drop from 38 films – or 5.0% of all releases – in 2019. A total of 117 releases were shown at 100 sites or over (30% of all films released), while 110 films were shown at fewer than 10 sites (28%).

Table 6 Number of releases and median box office gross by number of sites at widest point of release, 2020

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥600	9	2.4	8,825,588	2,516,068	44,093,644
500-599	11	2.9	2,795,843	455,472	16,214,071
400-499	17	4.5	809,063	304,021	4,002,501
300-399	13	3.4	764,175	73,464	1,636,943
200-299	21	5.5	157,048	30,392	1,533,299
100-199	46	12.1	90,445	14,426	1,427,214
50-99	44	11.5	51,461	4,335	567,969
10-49	110	28.9	11,693	937	181,241
<10	110	28.9	2,926	32	49,157
Total	**381**	**100.0**	**19,945**	**32**	**44,093,644**

Source: Comscore, BFI RSU analysis
Note: Percentages may not sum to 100 due to rounding.

Country of origin of film releases

Twenty-eight per cent of all films released in the UK and Republic of Ireland in 2020 were of USA origin (excluding UK-qualifying partnerships) and these films accounted for 42% of total box office earnings (Table 7).

UK films, including co-productions, represented 25% of releases (the same as in 2018 and 2019) and 46.5% of the box office. UK qualifying independent films represented the majority of this share of releases (23% overall) and accounted for 14% of the box office (similar percentages to 2018 and 2019)

Films originating outside the UK and USA accounted for 47% of releases in 2020 (down from 50% in 2019) and accounted for 11% of earnings. This is a big increase on the 4% seen in the previous two years, and it is mostly attributable to the box office successes of the Oscar® winning *Parasite* from South Korea and the Canadian *PAW Patrol: Ready Race Rescue*. Films from non-UK European countries accounted for 2.7% of the box office (up from 1.1% in 2019) from 23% of releases. Films from India accounted for 0.9% of the total box office in 2020, down from 2019 (1.2%).

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2020

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	107	28.1	104.1	42.1
UK (studio-backed*)	7	1.8	79.7	32.3
UK (independent)	89	23.4	35.1	14.2
All UK	96	25.2	114.8	46.5
Other Europe	88	23.1	6.6	2.7
India	43	11.3	2.3	0.9
Rest of the world	47	12.3	19.2	7.8
Total	**381**	**100.0**	**247**	**100**

Source: Comscore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 18 February 2020.
Percentages may not sum to totals due to rounding.
* 'Studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

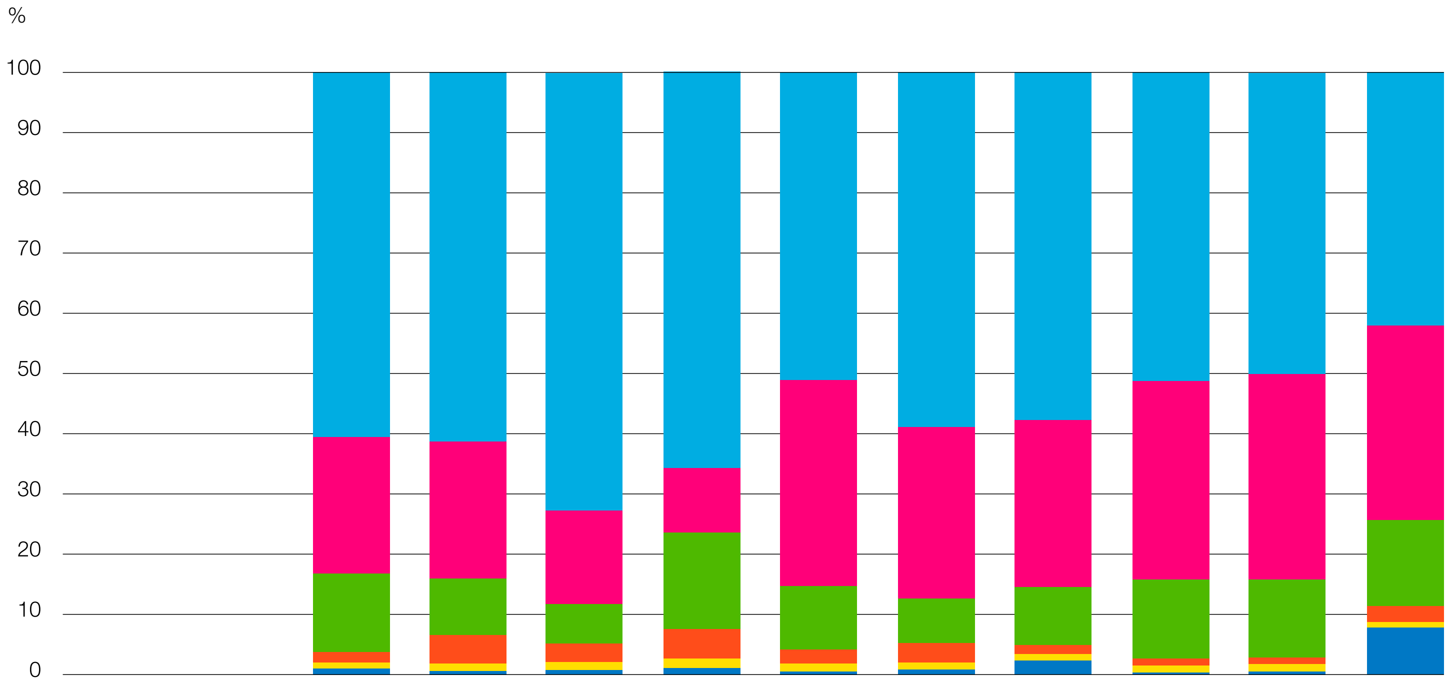
Figure 7 shows the breakdown of market share by country of origin for all films released between 2011 and 2020. The most significant trend over the period has been a decline in share for USA-only films, which has been compensated by an increase in share for UK/USA studio-backed titles. The combined share of USA-only and UK/USA studio-backed films was 88% in 2013, but fell to an average of around 84% for the remainder of the period, before dropping to 74% in 2020.

UK-qualifying independent films had a market share of 14% in 2020. This was the highest share since 2014 (16%), and was driven by titles including *The Gentlemen, Emma* and *The Personal History of David Copperfield.*

2020 saw a larger share of the market generated by films from the 'Rest of the World', thanks to the performance of *Parasite*, which made £12 million and accounted for 63% of the 'Rest of the World' total.

The high levels of market share achieved by UK studio-backed films between 2015 and 2019 reflects the number of successful big budget franchise productions making use of the UK's filmmaking infrastructure during those years.

Figure 7 Market share by country of origin, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
USA	60.6	61.3	72.7	65.8	51.1	58.9	57.7	51.3	50.0	42.1
UK studio-backed*	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9	34.1	32.3
UK independent	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2	13.0	14.2
Other Europe	1.7	4.8	3.0	4.9	2.4	3.2	1.5	1.1	1.1	2.7
India	1.0	1.2	1.4	1.5	1.3	1.2	1.1	1.2	1.2	0.9
Rest of the world	1.0	0.6	0.7	1.1	0.5	0.8	2.3	0.3	0.5	7.8

Source: BFI, RSU
Notes:
Data has been revised since the publication of the 2019 data
* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

The fluctuating pattern of UK market share is underlined in Figure 8 with the annual figure dependent on a small number of high grossing titles. The average UK qualifying independent market share for the 10-year period was just over 10% with a slight upward trend from a low of just over 6.6% in 2013.

Figure 8 UK films' share of the UK theatrical market, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK studio-backed*	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9	34.1	32.3
UK independent	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2	13.0	14.2

Source: BFI, RSU

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

Table 8 shows the share of UK film releases by box office band over the 10-year period. In 2020, 91% of UK films earned less than £1 million at UK and Republic of Ireland cinemas (the largest share of the period), while only one film (1917) earned £20 million or more. Only eight UK titles made more than £1 million at the box office, with *Tenet* and *Wonder Woman 1984* being the only two titles to pass the £1 million mark after the first UK lockdown.

Table 8 UK releases by box office band, 2011-2020 (£ million)

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
2011	Number	7	4	6	16	24	70	127
	%	5.5	3.1	4.7	12.6	18.9	55.1	100.0
2012	Number	5	3	7	13	32	102	162
	%	3.1	1.9	4.3	8.0	19.8	63.0	100.0
2013	Number	4	3	8	14	21	89	139
	%	2.8	2.2	5.8	10.1	15.1	64.0	100.0
2014	Number	3	3	9	21	28	90	154
	%	1.9	1.9	5.8	13.6	18.2	58.4	100.0
2015	Number	7	8	7	20	28	139	209
	%	3.3	3.8	3.3	9.6	13.4	66.5	100.0
2016	Number	6	5	10	17	16	122	176
	%	3.4	2.8	5.7	9.7	9.1	69.3	100.0
2017	Number	7	6	5	20	28	93	159
	%	4.4	3.8	3.1	12.6	17.6	58.5	100.0
2018	Number	9	6	9	20	48	105	197
	%	4.6	3.0	4.6	10.2	24.4	53.3	100.0
2019	Number	9	7	8	20	30	117	191
	%	4.7	3.7	4.2	10.5	15.7	61.3	100
2020	Number	1	3	2	2	18	70	96
	%	1.0	3.1	2.1	2.1	18.8	72.9	100

Source: Comscore, BFI RSU analysis
Note: Percentages may not sum to 100 due to rounding.

TOP FILMS IN 2020

Cover image: *1917* © Universal Studios. Courtesy of Entertainment One UK

FACTS IN FOCUS

The top 20 films released at the UK and Republic of Ireland box office in 2020 grossed £201 million, just over a quarter of the £767 million earned by the top 20 films in 2019.

- The biggest film of the year was *1917* with takings of £44 million.
- *1917* was the only film to earn more than £20 million at the UK and Republic of Ireland box office in 2020, down from 17 in 2019.
- Seven UK qualifying films featured in the top 20 films of the year, four of which were UK independent films.
- *The Gentlemen*, with takings of £12 million, was the highest earning independent UK film of the year.
- The top 20 UK films made £113 million (£527 million in 2019), 46% of the total box office.
- The top 20 UK independent films made £34 million (£145 million in 2019), 14% of the total box office.
- Six UK qualifying films spent a total of 17 weeks at the top of the UK and Republic of Ireland weekend box office charts.
- Action was the highest grossing genre of the year with takings of £48.5 million.
- Specialised film (foreign language films, documentaries, and re-releases) made £24 million at the UK and Republic of Ireland box office from 218 releases.

Top Films in 2020

The top 20 films

In a year dominated by the impact of the COVID-19 pandemic, Sam Mendes's First World War drama *1917* was the biggest earner at the UK and Republic of Ireland box office in 2020 (Table 1). The UK/USA production grossed £44 million, the lowest take for an annual top film since 2014 when *The Hobbit: The Battle of the Five Armies* earned £41 million. It was the only release to gross over £20 million in 2020, down from 17 releases in 2019.

The top 20 films had a combined gross of £201 million, which accounted for 80% of the total UK and Republic of Ireland box office for films released in the year. In 2019, the top 20 films earned £767 million (59% of the total box office).

The disruption caused by the pandemic in 2020 is illustrated by the fact that 17 films in the top 20 were released before the introduction of the first national lockdown in March and that three of the highest earning films in cinemas during the year were 2019 releases: *Little Women*, which earned £15.3 million in 2020, *Star Wars: The Rise of Skywalker* (£11.4 million in 2020) and *Jumanji: The Next Level* (£11.0 million in 2020). The only top 20 films of 2020 not released before March were *Tenet* (£17.5 million, released late August), *After We Collided* (£4 million, early September), and *Unhinged* (£2 million, late July).

For the first time since the release of *The Passion of the Christ* (£11 million) in 2004, the top 20 films feature a non-English language film. South Korean director Bong Joon-ho's Oscar® winning dark comedy *Parasite* earned £12 million to become the all-time highest grossing foreign language film at the UK and Republic of Ireland box office.

Seven of the top 20 releases in 2020 were UK qualifying films (down from nine in 2019), four of which were UK independent films (up from one in 2019).

Table 1 Box office results for the top 20 films released in the UK and Republic of Ireland, 2020

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release	Opening weekend gross (£ million)	Distributor
1	1917	UK/USA	44.1	751	7.5	Entertainment One
2	Sonic the Hedgehog	USA/Jpn/Kor	19.3	640	4.7	Paramount
3	Tenet	UK/USA	17.5	624	5.3	Warner Bros
4	Bad Boys for Life	USA	16.2	561	3.8	Sony
5	Dolittle	UK/USA	15.9	686	5.2	Universal
6	The Gentlemen	UK/USA#	12.3	516	3.1	Entertainment Film Distributors
7	Parasite	Kor	12.1	592	1.4	StudioCanal
8	Birds of Prey (and the Fantabulous Emancipation of One Harley Quinn)	USA	8.8	633	2.7	Warner Bros
9	Jojo Rabbit	NZl/USA/Cze	8.1	542	2.4	Walt Disney
10	Onward	USA	7.7	636	3.4	Walt Disney
11	Emma	UK	7.5	654	1.6	Universal
12	The Invisible Man	USA/Aus	6.9	584	2.2	Universal
13	The Personal History of David Copperfield	UK/USA#	6.4	680	1.5	Lionsgate
14	After We Collided	USA	4.0	492	0.3	Shear Entertainment
15	The Call of the Wild	USA	2.8	502	1.5	Walt Disney
16	Dark Waters	USA	2.5	448	0.9	Entertainment One
17	Military Wives	UK	2.5	671	1.0	Lionsgate
18	Bombshell	USA/Can	2.3	486	0.7	Lionsgate
19	Unhinged	USA	2.0	484	0.2	Altitude
20	Paw Patrol: Ready, Race, Rescue!	Can	1.9	531	0.5	Paramount

Source: Comscore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 18 February 2021.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

The top 20 UK films

The top 20 UK qualifying films of 2020, shown in Table 2, had a combined gross of £113 million, which was 46% of the total UK and Republic of Ireland box office for films released in the year. This was less than one quarter of the £527 million earned by the top 20 UK films released in 2019 (41% of the total box office) and is the lowest combined box office gross for the top 20 UK films of any year since we started publishing the yearbook in 2002.

Four UK films earned over £10 million in 2020, down from 16 in 2019. Fifteen of the top 20 titles were UK independent films, up from eight in 2019, and these films accounted for 30% of the total gross for the top 20 UK films, up from 19% in 2019. (This was the first year since 2009 to have 15 UK independent titles among the top 20 UK films.)

Table 2 Box office results for the top 20 UK films released in the UK and Republic of Ireland, 2020

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release	Opening weekend gross (£ million)	Distributor
1	1917	UK/USA	44.09	751	7.46	Entertainment One
2	Tenet	UK/USA	17.47	624	5.34	Warner Bros
3	Dolittle	UK/USA	15.95	686	5.16	Universal
4	The Gentlemen	UK/USA#	12.27	516	3.09	Entertainment Film Distributors
5	Emma	UK	7.46	654	1.64	Universal
6	The Personal History of David Copperfield	UK/USA#	6.41	680	1.53	Lionsgate
7	Military Wives	UK	2.52	671	0.97	Lionsgate
8	Wonder Woman 1984	UK/USA	1.53	216	0.89	Warner Bros
9	Saint Maud	UK	0.85	356	0.26	StudioCanal
10	Greed	UK/USA#	0.81	404	0.37	Sony
11	The Secret Garden	UK/Fra	0.73	201	0.16	Sky Cinema
12	Inception: 10th Anniversary	UK/USA	0.50	440	0.21	Warner Bros
13	Misbehaviour	UK	0.46	511	0.35	Walt Disney
14	Pixie	UK	0.43	325	0.12	Paramount
15	The Rhythm Section	UK/USA#	0.36	405	0.18	Paramount
16	Rocks	UK	0.28	125	0.08	Altitude
17	Hope Gap	UK	0.20	81	0.07	Curzon Artificial Eye
18	Street Dancer 3D	UK/Ind	0.18	60	0.09	Cinestaan AA
19	Summerland	UK	0.17	96	0.02	Lionsgate
20	23 Walks	UK	0.16	137	0.03	Parkland Entertainment

Source: Comscore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 18 February 2021.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

The top 20 UK independent films

The top 20 UK independent films of 2020, shown in Table 3, had a combined gross of £34 million (down from £145 million in 2019), and accounted for 96% of the total box office for all UK independent films released in 2020 (up from 87% in 2019). Over three quarters of this total was earned by just three releases, *The Gentlemen* (£12 million), *Emma* (£7.5 million) and *The Personal History of David Copperfield* (£6 million). The list includes a number of independent productions which qualified as British under the cultural test for film and are considered 'Inward Investment' productions. (Titles in this category include *Street Dancer 3D* and *Chal Mera Putt 2*.)

The top 20 UK independent films accounted for 14% of the overall UK and Republic of Ireland box office in 2020, up from 11% in 2019.

Table 3 Box office results for the top 20 UK independent films released in the UK and Republic of Ireland, 2020

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release	Opening weekend gross (£ million)	Distributor
1	The Gentlemen	UK/USA#	12.27	516	3.09	Entertainment Film Distributors
2	Emma	UK	7.46	654	1.64	Universal
3	The Personal History of David Copperfield	UK/USA#	6.41	680	1.53	Lionsgate
4	Military Wives	UK	2.52	671	0.97	Lionsgate
5	Saint Maud	UK	0.85	356	0.26	StudioCanal
6	Greed	UK/USA#	0.81	404	0.37	Sony
7	The Secret Garden	UK/Fra	0.73	201	0.16	Sky Cinema
8	Misbehaviour	UK	0.46	511	0.35	Walt Disney
9	Pixie	UK	0.43	325	0.12	Paramount
10	The Rhythm Section	UK/USA#	0.36	405	0.18	Paramount
11	Rocks	UK	0.28	125	0.08	Altitude
12	Hope Gap	UK	0.20	81	0.07	Curzon Artificial Eye
13	Street Dancer 3D	UK/Ind	0.18	60	0.09	Cinestaan AA
14	Summerland	UK	0.17	96	0.02	Lionsgate
15	23 Walks	UK	0.16	137	0.03	Parkland Entertainment
16	Mr. Jones	UK/Pol/Ukr	0.13	18	0.02	Signature Entertainment
17	Chal Mera Putt 2	UK/Ind	0.11	58	0.09	Rhythm Boyz Entertainment
18	A Christmas Carol	UK/Ukr	0.10	172	0.02	Munro Film Services
19	Jawaani Jaaneman	UK/Ind	0.10	35	0.05	Hamsini Entertainment
20	Schemers	UK	0.10	210	0.03	Munro Film Services

Source: Comscore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 18 February 2021.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

Best weekend performances of UK films

There were only 31 weekends in 2020 when a majority of UK cinemas were open (this includes periods when cinemas were operating at reduced capacity due to rules on social distancing). A total of 12 different films topped the UK weekend box office charts over this period. Six of these were UK titles, which spent a combined total of 17 weeks at number one (Table 4). The table includes theatrical grosses generated over the three-day weekend plus revenues from any previews. (In 2019, 14 UK films achieved the number one slot in the weekend charts for a total of 25 weeks.)

Christopher Nolan's *Tenet*, the third highest grossing film of the year, spent eight weeks at the top of the box office charts in 2020, the longest run in the top spot since the release of *Avatar*, which topped the charts for nine weeks in 2009. *Tenet's* lengthy run, however, is partly due to the lack of other major releases during the period. The espionage thriller took £5.3 million on its five-day opening (£3.3 million, Fri-Sun) but by its eighth weekend at number one it grossed only £0.2 million.

Additionally, UK independent titles *The Secret Garden* and *The Three Kings* also topped the weekend box office charts, albeit in November when only a minority of cinemas were open.

Table 4 UK films at number one in the weekend box office charts, 2020

Title	First week at top	Opening weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
Star Wars: The Rise of Skywalker	03/01/2020*	20.9	58.3	Walt Disney	1
1917	10/01/2020	7.5	44.1	Entertainment One	4
Dolittle	07/02/2020	5.2	16.0	Universal	1
Inception: 10th Anniversary	14/08/2020	0.2	0.5	Warner Bros	1
Tenet	28/08/2020	5.3	17.5	Warner Bros	8
Wonder Woman 1984	18/12/2020	0.9	1.5	Warner Bros	2

Source: Comscore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 18 February 2021.
Opening weekend gross includes revenues from previews.
Only includes films shown during periods when a majority of cinemas were open, even if under social distancing regulations.
* *Star Wars: The Rise of Skywalker* was released in 2019 when it topped the weekend chart for the last two weeks in December. Its opening weekend and box office grosses were included in last year's edition of the Statistical Yearbook.

Specialised films at the UK box office in 2020

Specialised films offer audiences an experience of cinema that can be very different from the titles that dominate the overall box office charts. The definition of 'specialised' used here includes any documentary feature film, any film where the main language spoken is not English, and any film re-release. (Non-feature film releases, such as recorded live performances, are not considered to be specialised; they are categorised as event cinema. For more information, see the Exhibition chapter.)

In total, 218 documentaries, foreign language films and re-releases of archive/classic films were shown at UK cinemas in 2020, representing 57% of all theatrical releases in the year (Table 5). These films grossed £24 million, a 10% share of total box office earnings. These figures are down from 412 releases with a £35 million total gross in 2019, but an increase in box office share from 3%. However, more than half of the gross of specialised films in 2020 was generated by just one film – foreign language title *Parasite* (£12 million).

Table 5 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2020

Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	42	11.0	0.4	0.2	19
Foreign language	145	38.1	20.2	8.2	42
Re-release	48	12.6	4.1	1.7	105
All specialised films*	218	57.2	23.8	9.6	52
All films	381	100.0	246.9	100.0	110

Source: Comscore, BFI RSU analysis
Notes:
* Due to some overlap of categories (e.g. the re-release of foreign language title *Memories of Murder*) this total refers to the number of specialised films, not the sum total of the categories in the table. This total does not include the category of 'other specialised films' which has been used in previous Yearbooks.
Figures as at 18 February 2021.

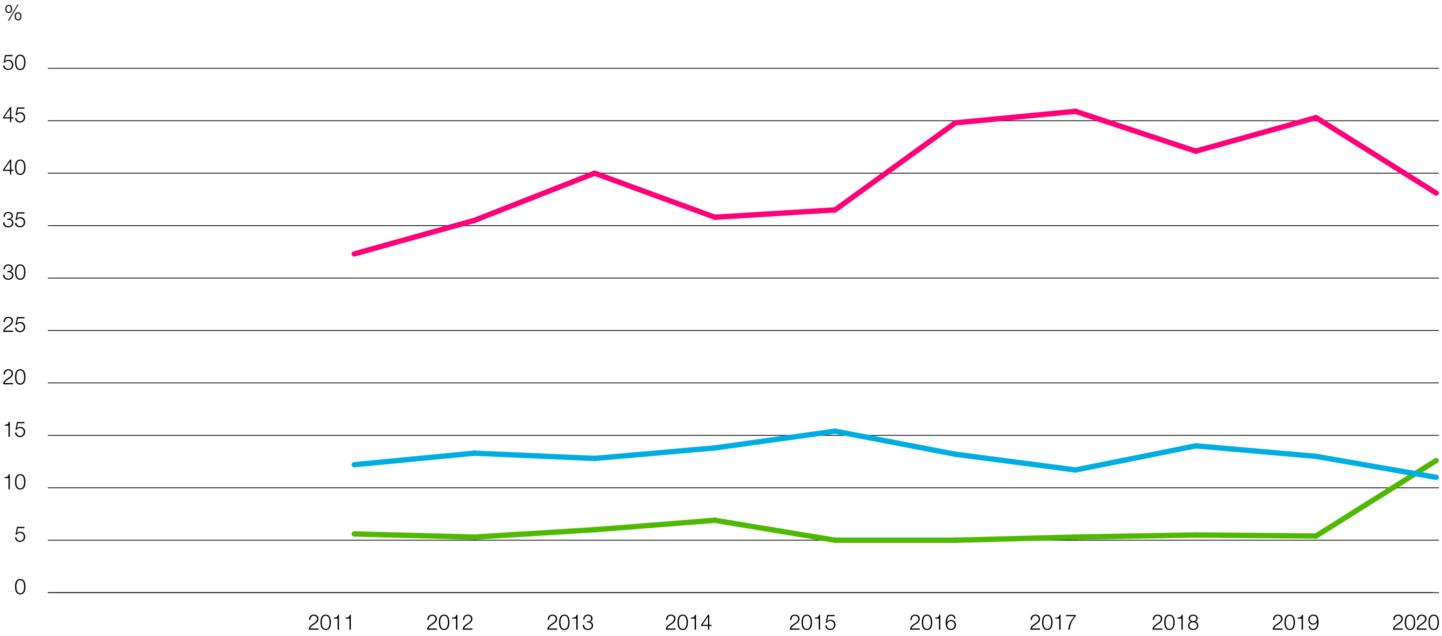
Image: *The Gentlemen* courtesy of Entertainment Film Distributors

Trends in specialised film

Figure 1 shows the trend in specialised film releases from 2011-2020 by share of total releases. As a percentage of total in-year releases, foreign language releases have ranged from 32% (2011) to 46% (2017), and fell from 45% in 2019 to 38% in 2020. Documentary releases have increased from a 12% share in 2011 to 14% in 2018 before falling to 13% in 2019 and to 11% in 2020, the lowest value of the period.

Re-releases drastically increased as a proportion of total releases in 2020 to 13%, almost double the previous high of 7% in 2014. This increase is reflective of distributors, in the absence of new releases, organising new re-releases of classic films to tempt people back into the cinema.

Figure 1 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, share of releases, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Documentary	12.2	13.3	12.8	13.8	15.4	13.2	11.7	14.0	13.0	11.0
Foreign language	32.3	35.5	40.0	35.8	36.5	44.8	45.9	42.1	45.3	38.1
Re-release	5.6	5.3	6.0	6.9	5.0	5.0	5.3	5.5	5.4	12.6

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

Non-English language films

Films in 33 different languages (including English) were released in the UK and Republic of Ireland in 2020 (Table 6), down from 42 different languages in 2019.

There were 145 foreign language film releases in 2020, down from 346 in 2019. These films took £20 million at the UK box office, meaning that they account 38% of all films released, but just 8% of the total box office. Foreign language films were shown at an average of 42 sites at their widest point of release compared to an average of 152 for English language films. After English, the most common languages, in terms of numbers of releases, were Hindi, French and Polish (Table 6). Korean was the top non-English language at the box office by value, with £12.3 million from four releases (although just one – *Parasite* – accounted for £12.1 million), followed by Hindi (£1.5 million) and Polish (£1.1 million).

Table 6 Languages of films released in the UK and Republic of Ireland, 2020 (ranked by gross box office)

	Main language	Number of releases	Gross box office (£ million)	Box office share (%)
	English	236	226.7	91.83
1	Korean	4	12.3	4.99
2	Hindi	15	1.5	0.74
3	Polish	12	1.1	0.46
4	Italian	5	1.0	0.42
5	French	13	1.0	0.40
6	Japanese	5	0.9	0.36
7	Danish	2	0.5	0.20
8	Tamil	10	0.4	0.17
9	Telugu	6	0.3	0.12
10	Punjabi	8	0.3	0.12
	Other (22 languages)	65	0.8	0.32

Source: Comscore, IMDb, BFI RSU analysis
Notes:
Figures as at 18 February 2021.

Table 7 shows the top 10 non-Hindi foreign language films of 2020. The Oscar® Best Picture winner *Parasite* tops the list with £12 million, the highest grossing foreign language film at the UK and Republic of Ireland box office to date. Two animated films make the list, both from Japan: *Weathering With You* and the re-release of *Akira*.

Table 7 Top 10 foreign language films (excluding Hindi*) released in the UK and Republic of Ireland, 2020

	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	Parasite	Kor	12.12	StudioCanal	Korean
2	Pinocchio	Ita/Fra/UK	0.86	Vertigo Releasing	Italian
3	Portrait Of A Lady On Fire	Fra	0.57	Curzon	French
4	Weathering With You	Jpn	0.55	National Amusements UK	Japanese
5	Dreambuilders	Dnk	0.50	Signature Entertainment	Danish
6	Psy 3: W Imie Zasad	Pol	0.46	Magnetes Pictures	Polish
7	Darbar	Ind	0.33	Sun Media	Tamil
8	Akira (re-release)	Jpn	0.31	National Amusements UK	Japanese
9	How I Became A Gangster. A True Strory	Pol	0.27	Phoenix	Polish
10	Les Miserables	Fra	0.18	Altitude/Aerodrome	French

Source: Comscore, BBFC, IMDb, BFI RSU analysis, distributor websites
Notes:
* For Hindi language titles, see Table 8.
Figures as at 18 February 2021.

In recent years Hindi language films frequently dominated amongst foreign language releases in terms of the number of releases and of their total box office grosses, so Table 8 breaks out the top 10 Hindi language film releases of 2020 to look at them in isolation. The list is headed by action sequel *Baaghi 3* (£0.25 million). Two UK qualifying films make the list, *Street Dancer* and *Jawaani Jaaneman*, both of which featured substantial UK location shooting.

Table 8 Top 10 Hindi language films released in the UK and Republic of Ireland, 2020

	Title	Country of origin	UK box office total (£ million)	Distributor
1	Baaghi 3	Ind/USA	0.25	Walt Disney
2	Chhapaak	Ind	0.18	Walt Disney
3	Street Dancer 3D	UK/Ind	0.18	Cinestaan AA Distributors
4	Tanhaji: The Unsung Warrior	Ind	0.16	Cinestaan AA Distributors
5	Malang - Unleash The Madness	Ind	0.13	Yash Raj Films
6	Love Aaj Kal 2	Ind	0.13	Hamsini Entertainment
7	Shubh Mangal Zyada Saavdhan	Ind	0.12	Hamsini Entertainment
8	Jawaani Jaaneman	UK/Ind	0.10	Hamsini Entertainment
9	Thappad	Ind	0.08	Cinestaan AA Distributors
10	Panga	Ind	0.07	Walt Disney

Source: Comscore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 18 February 2021.

Documentaries

A total of 42 feature documentaries (11% of theatrical releases) were released in the UK and Republic of Ireland in 2020, down from 99 and 13% in 2019. These films earned £0.4 million, 0.2% of the overall box office gross (£7.8 million and 0.6% in 2019).

No documentaries earned more than £1 million at the UK and Republic of Ireland box office in 2020 (down from two in 2019), with top film *I Am Greta*, about climate activist Greta Thunberg, grossing £0.05 million (Table 9). Second highest grossing film, *White Riot* (£0.04 million), also dealt with activism in the form of the Rock Against Racism civil rights movement, and was one of three UK films to make the top ten, along with *Max Richter's Sleep* and *Everything: The Real Thing Story.*

Table 9 Top 10 feature documentaries released in the UK and Republic of Ireland, 2020

	Title	Country of origin	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	I Am Greta	Swe	0.05	251	Dogwoof
2	White Riot	UK	0.04	50	Modern Films
3	Toni Morrison: The Pieces I Am	USA	0.03	26	Republic Film
4	The Gift	Aus/USA	0.02	51	Altitude/Wildcard
5	Cunningham	Fra/Deu/Che/USA	0.02	21	Dogwoof
6	Max Richter's Sleep	UK	0.02	21	Dogwoof
7	Midnight Traveler	USA	0.02	9	Dogwoof
8	Midnight Family	USA/Mex	0.02	15	Dogwoof
9	Talking About Trees	Fra/Deu/Tcd/Sdn/Qat	0.02	7	New Wave Film
10	Everything: The Real Thing Story	UK	0.01	3	Music Film Network

Source: Comscore, BFI RSU analysis
Note: Figures as at 18 February 2021.

Genre in the Statistical Yearbook

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

Releases and box office by genre

Table 10 shows the relative popularity of different genres at the box office in the UK and Republic of Ireland in 2020. The pattern of box office by genre each year is usually determined by a small number of high grossing releases. For the sixth consecutive year, action was the top earning genre with a combined gross of £48.5 million, followed by war with £44 million (99.6% of war's total gross was generated by 1917), and then animation with £35 million. Drama has the highest number of releases (140) which is consistent with previous years. In 2020, over one third of releases (37%) were dramas and these films generated 13% of the overall box office.

Just six of the top performing titles by genre in 2020 were UK qualifying films, down from 12 in 2019. Two of the films were UK/USA studio titles (*1917* and *Tenet*), with four being UK qualifying independent titles (*Hope Gap, Mr Jones, The Gentlemen*, and *The Personal History of David Copperfield*).

Table 10 Films released in the UK and Republic of Ireland by genre, 2020 (ranked by gross box office)

Genre	Number of releases	% of releases	Gross box office (£ million)	% of total box office	Average number of sites at widest point of release	Top performing title
Action	36	9.4%	48.5	19.7%	167	Bad Boys For Life
War	3	0.8%	44.3	17.9%	296	1917
Animation	19	5.0%	34.8	14.1%	260	Sonic The Hedgehog
Thriller	15	3.9%	32.8	13.3%	192	Tenet
Drama	140	36.7%	31.4	12.7%	83	The Personal History of David Copperfield
Comedy	65	17.1%	24.0	9.7%	108	Jojo Rabbit
Crime	8	2.1%	12.5	5.1%	118	The Gentlemen
Horror	24	6.3%	12.1	4.9%	172	The Invisible Man
Adventure	9	2.4%	3.8	1.6%	152	The Call Of The Wild
Fantasy	2	0.5%	0.9	0.4%	315	Pinocchio
Romance	6	1.6%	0.4	0.2%	30	Hope Gap
Documentary	42	11.0%	0.4	0.2%	19	I Am Greta
Western	2	0.5%	0.3	0.1%	53	True History Of The Kelly Gang
Family	3	0.8%	0.3	0.1%	85	Max Winslow And The House Of Secrets
Biopic	3	0.8%	0.2	0.1%	16	Mr. Jones
Sci fi	4	1.0%	0.1	0.0%	18	Color Out Of Space
Total	**381**	**100.0%**	**246.9**	**100.0%**	**110**	

Source: Comscore, BFI RSU analysis
Note: Figures/percentages may not sum to totals due to rounding.

BBFC classification

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

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

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

Releases and box office by BBFC classification

Table 11 shows a breakdown of 2020 releases by BBFC film classification. It shows that, as in previous years, more ‘15’ films (43%) were released than any other category, and this year they also had the largest share of box office gross (47%).

Table 11 All releases in the UK and Republic of Ireland by BBFC film classification, 2020

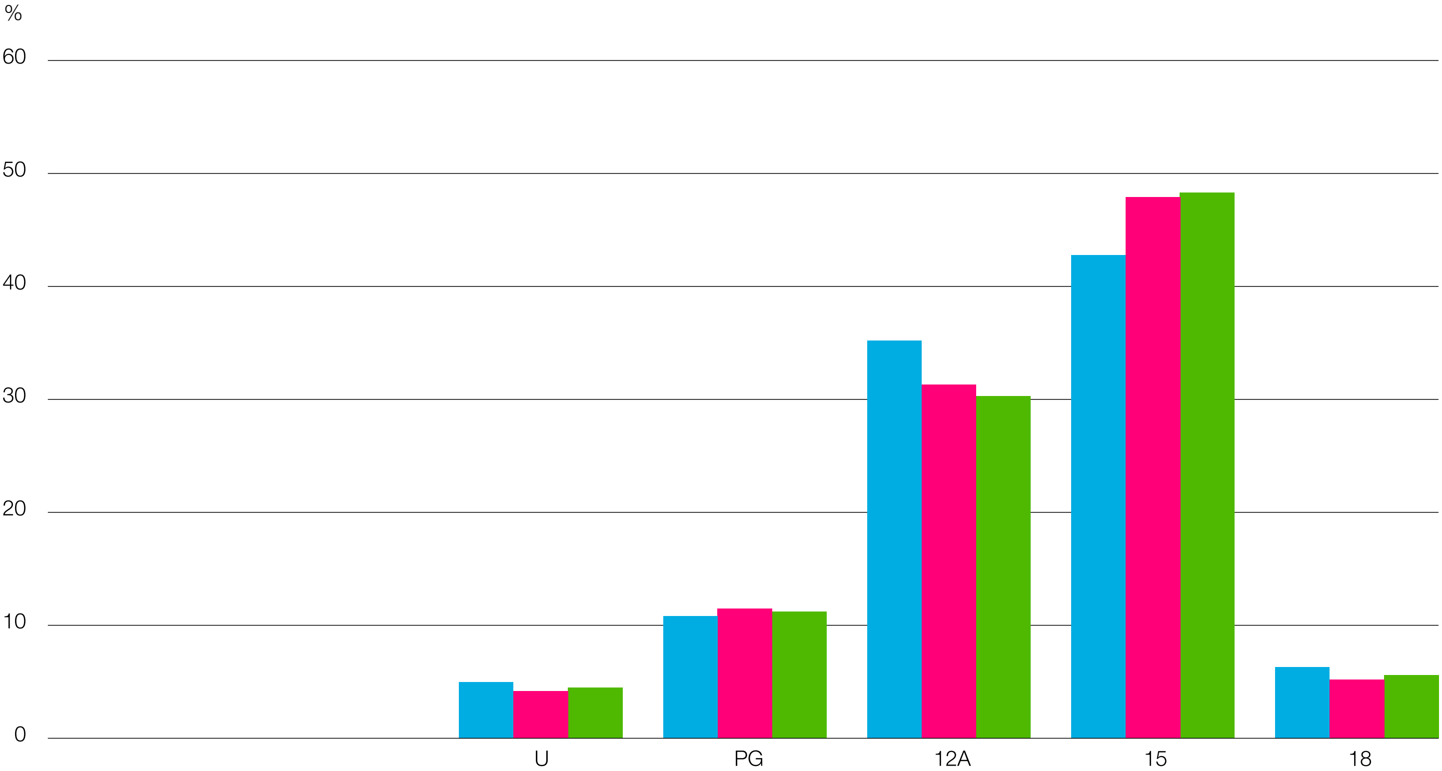
	Number of releases	% of all UK releases	Gross box office (£ million)	% of gross box office	Top performing title
U	19	5.0%	21.5	8.7%	Onward
PG	41	10.8%	53.7	21.8%	Sonic The Hedgehog
12A	134	35.2%	42.2	17.1%	Tenet
15	163	42.8%	115.8	46.9%	1917
18	24	6.3%	13.6	5.5%	The Gentlemen
Total	**381**	**100.0%**	**246.9**	**100.0%**	

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2021.

Figures 2 and 3 show a comparison of the share of releases and gross box office by BBFC classification for all films, UK films and UK independent films in 2020. Titles with a '15' classification accounted for the highest proportion of releases in all categories, and the greatest box office share in the 'all films' and 'UK films' categories, aided substantially by top grossing film, the UK/USA 1917, being a '15' certificate and constituting 18% of the overall box office total. *The Gentlemen*, the top grossing UK independent film of the year, made 35% of the total UK independent film grosses, single-handedly making '18' certificate films the highest grossing film classification group for UK independent films.

Of the top ten grossing films of the year, only one was a 'U' (Onward), two were 'PG' (*Sonic the Hedgehog*, and *Dolittle*), two were '12A' (*Tenet* and *Jojo Rabbit*), four were '15' (*1917, Bad Boys for Life, Parasite*, and *Birds of Prey*), and one was '18' (*The Gentlemen*).

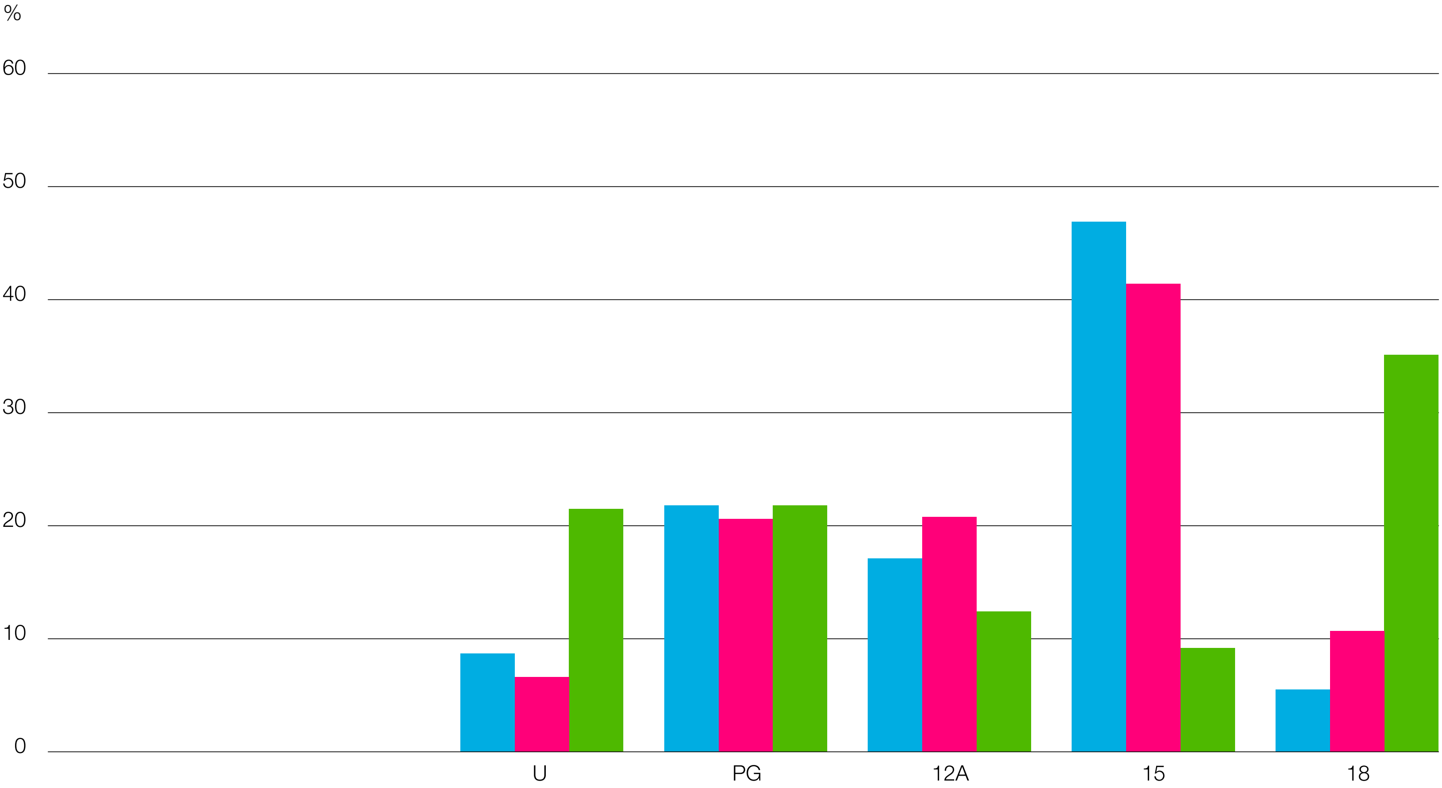
Figure 2 Percentage of releases by BBFC film classification for all films, UK films and UK independent films, 2020



	U	PG	12A	15	18
All film	5.0	10.8	35.2	42.8	6.3
UK film	4.2	11.5	31.3	47.9	5.2
UK independent film	4.5	11.2	30.3	48.3	5.6

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2021.

Figure 3 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2020



	U	PG	12A	15	18
All film	8.7	21.8	17.1	46.9	5.5
UK film	6.6	20.6	20.8	41.4	10.7
UK independent film	21.5	21.8	12.4	9.2	35.1

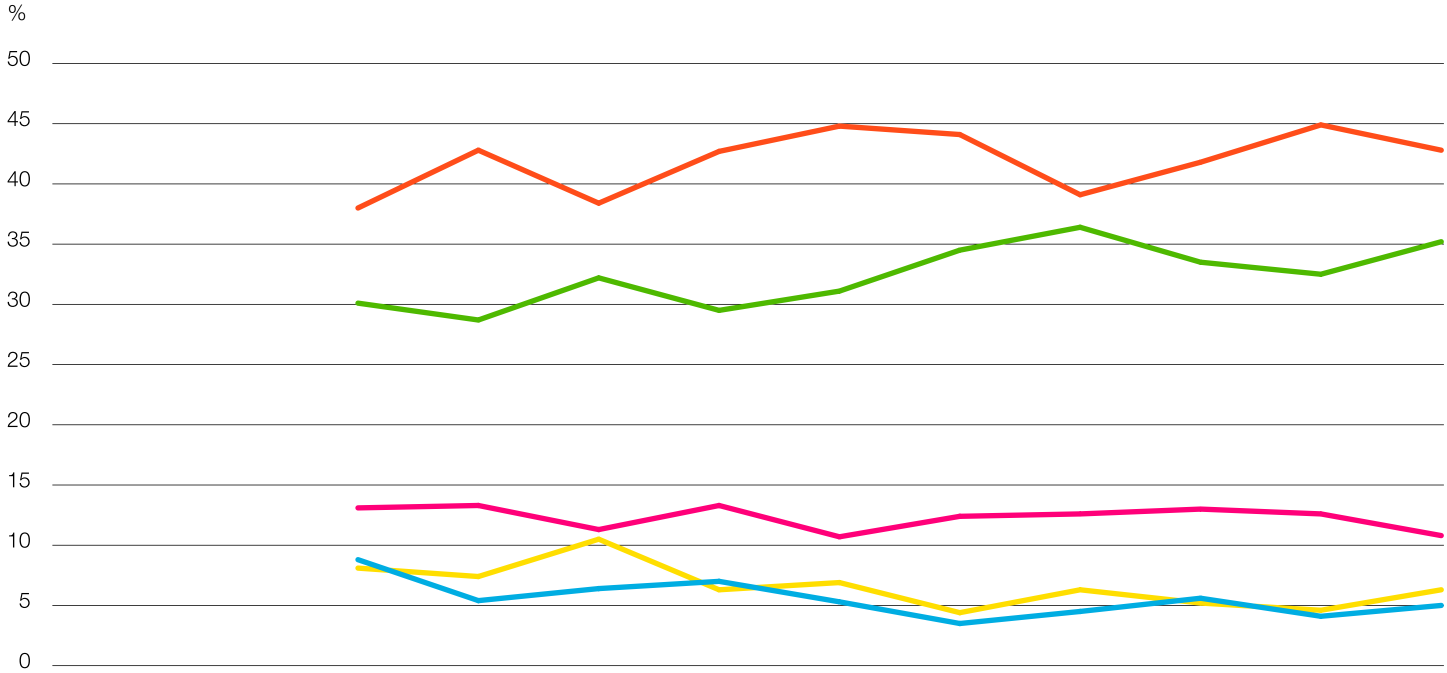
Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2021.

Image: *Parasite* courtesy of StudioCanal

Figures 4 and 5 look at the pattern of releases by classification between 2011 and 2020, in terms of share of releases and box office. Throughout the period the ranking of classifications by number of film releases has been consistent, with '15' certificates being the most common classification, followed by '12A' and 'PG', and then either 'U' or '18' which frequently see very similar numbers of releases.

While only representing between 29% and 36% of releases over the period, up until 2020 '12A' films consistently grossed the highest amount, with a box office share between 36% and 56%. While two of the highest grossing films of the year were certified '12A' (*Tenet* and *Jojo Rabbit*), the box office share in 2020 was substantially affected by the '15' certificate *1917* being the top grossing film by a large margin. Consequently, '15' certificates had a 43% share of the UK and Republic of Ireland box office (with *1917* making up 18 percentage points of this share).

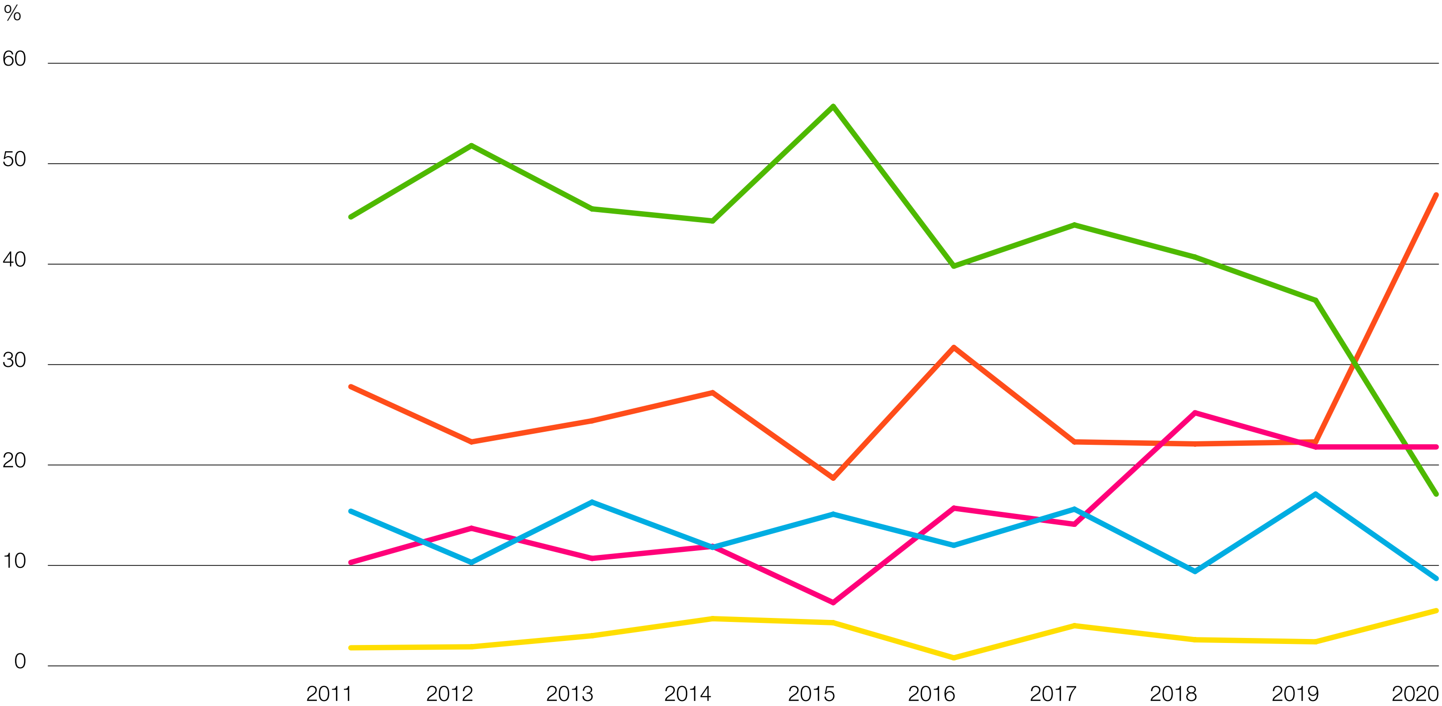
Figure 4 Percentage of releases in the UK and Republic of Ireland by film classification, 2010-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
U	8.8	5.4	6.4	7.0	5.3	3.5	4.5	5.6	4.1	5.0
PG	13.1	13.3	11.3	13.3	10.7	12.4	12.6	13.0	12.6	10.8
12A	30.1	28.7	32.2	29.5	31.1	34.5	36.4	33.5	32.5	35.2
15	38.0	42.8	38.4	42.7	44.8	44.1	39.1	41.8	44.9	42.8
18	8.1	7.4	10.5	6.3	6.9	4.4	6.3	5.2	4.6	6.3

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2021.

Figure 5 Percentage of gross box office of releases in the UK and Republic of Ireland by film classification, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
U	15.4	10.3	16.3	11.8	15.1	12.0	15.6	9.4	17.1	8.7
PG	10.3	13.7	10.7	11.9	6.3	15.7	14.1	25.2	21.8	21.8
12A	44.7	51.8	45.5	44.3	55.7	39.8	43.9	40.7	36.4	17.1
15	27.8	22.3	24.4	27.2	18.7	31.7	22.3	22.1	22.3	46.9
18	1.8	1.9	3.0	4.7	4.3	0.8	4.0	2.6	2.4	5.5

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2021.

BFI

UK FILMS AND BRITISH TALENT WORLDWIDE

FACTS IN FOCUS

The COVID-19 pandemic substantially affected the worldwide box office with takings falling from $42 billion in 2019 to $12 billion in 2020. The UK film share of global box office receipts was 9%, with a share of 2% for UK independent films.

- In 2020, UK qualifying films earned $1.1 billion at the worldwide box office, 9% of the global theatrical market ($10.3 billion and 25% in 2019).
- UK independent films earned $242 million at the worldwide box office in 2020, a 2% share of the global theatrical market (down from 2.5% in 2019).
- The highest earning UK film at the worldwide box office in 2020 was *Tenet* with a gross of $293 million.
- The highest earning UK independent film worldwide in 2020 was *The Gentlemen* with a gross of $98 million.
- The box office share of UK independent films in the USA and Canada was 4% (the same as 2019), in Europe (eight major territories, excluding the UK and Republic of Ireland) it was 4% (the same as 2019), and in New Zealand it was 14% (up from 8% in 2019).
- Of the 200 highest earning films at worldwide cinemas from 2011-2020, 22 are based on stories and characters created by UK writers. Together they have earned $15 billion at the global box office.
- British actors have played lead or supporting roles in 68% of the 200 highest earning films from 2011-2020.
- UK directors were behind 29 of the 200 highest earning films worldwide from 2011-2020.
- UK films and British talent won 32 major film awards in 2020/21, including eight Oscars® and 14 BAFTAs.

UK films and British talent worldwide

UK films at the global box office

The COVID-19 pandemic, which began noticeably impacting countries early in 2020, quickly became a global concern, causing governments to implement a range of measures aimed at curbing the virus's spread. This led to widespread cinema closures and many theatrical releases being delayed into 2021. The pandemic affected every territory covered in this analysis, with all countries' box office takings for new film releases shrinking by around three-quarters on average compared with 2019.

UK qualifying films earned a worldwide gross of $1.1 billion in 2020, a 9% share of the global box office, down from £10.3 billion and 25% respectively in 2019 (Table 1).

UK studio-backed films (UK films wholly or partly financed and controlled by US studios but featuring UK cast, crew, locations, facilities, post-production and often UK source material) shared 7% of the worldwide box office in 2020, with earnings of $852 million, a substantial fall from 2019's market share of 22%. While none of 2020's planned releases were expected to earn as much as 2019's *Avengers: Endgame* (the second highest grossing film of all time), major UK studio-backed films removed from 2020's schedule included titles from franchises that traditionally generate substantial revenues at the worldwide box office, such as *Black Widow, Fast & Furious 9* and *No Time to Die*.

UK independent films earned 2% of global revenues in 2020, with a gross of $242 million, a fall from 2019's market share of 2.5%. While many UK independent films planned for release were also delayed (including *Everybody's Talking About Jamie, The French Dispatch* and *Supernova*), the reduced number of studio-backed films being released in the second half of the year meant that those cinemas which were open screened more independent films and older releases than would otherwise have been expected.

These shares of the global market include box office takings in the UK and Republic of Ireland release territory (where UK studio-backed films had a 32% share of the box office and UK independent films had 14%).

Table 1 UK films global market share, 2011-2020

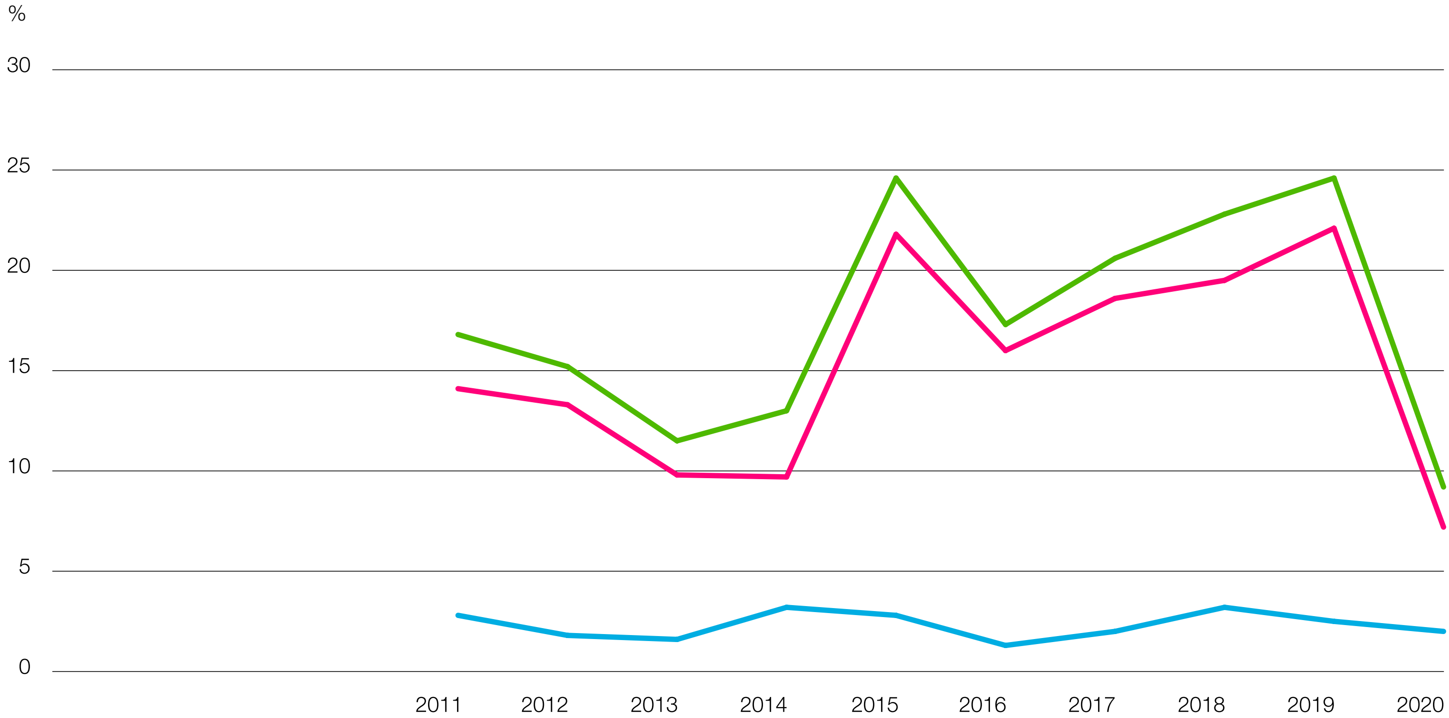
Year	Global theatrical market (US$ billion)	UK films worldwide gross (US$ billion)	UK share (%)	UK studio-backed films share (%)	UK independent films share (%)
2011	33.3	5.6	16.8	14.1	2.8
2012	34.9	5.3	15.2	13.3	1.8
2013	35.5	4.1	11.5	9.8	1.6
2014	36.1	4.7	13.0	9.7	3.2
2015	38.2	9.4	24.6	21.8	2.8
2016	37.6	6.5	17.3	16.0	1.3
2017	39.4	8.1	20.6	18.6	2.0
2018	41.4	9.4	22.8	19.5	3.2
2019	41.7	10.3	24.6	22.1	2.5
2020	11.9	1.1	9.2	7.2	2.0

Source: BFI, Comscore, Omdia
Note: 'Global theatrical market' here is a total of the takings from the 60 territories' box office reported by Omdia.

The annual global market share for UK films is closely aligned with the success of inward investment titles supported by the major Hollywood studios (Figure 1). The share of the market achieved by these studio-backed films fluctuates from year to year and is largely dependent on the performance of a small number of titles. The high points in the chart were propelled by the success of *Star Wars: The Force Awakens* ($1.9 billion) and *Avengers: Age of Ultron* ($1.4 billion) in 2015 and *Avengers: Endgame* ($2.4 billion) and *The Lion King* ($1.4 billion) in 2019. In comparison, the highest grossing UK qualifying film released in 2020 was *Tenet* which, although it was the fifth highest grossing film worldwide, made $293 million.

The annual global market share for UK qualifying independent films has ranged from 1% to 3% over the period. The highest earning UK independent release in 2020 was *The Gentlemen* ($98 million).

Figure 1 UK films global market share, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK Share (%)	16.8	15.2	11.5	13.0	24.6	17.3	20.6	22.8	24.6	9.2
UK studio-backed films* share (%)	14.1	13.3	9.8	9.7	21.8	16.0	18.6	19.5	22.1	7.2
UK independent films share (%)	2.8	1.8	1.6	3.2	2.8	1.3	2.0	3.2	2.5	2.0

Source: BFI, Comscore, Omdia
See note to Table 1.

The top 10 highest earning UK qualifying films released at the worldwide box office in 2020 grossed $977 million (Table 2). *Tenet* was the top grossing title with earnings of $293 million. Unlike in 2019, when the top 10 was comprised entirely of studio-backed titles, all of which were either franchise films, 'live-action' remakes or sequels, 2020's top 10 contains four UK independent titles (*The Gentlemen, Emma, The Personal History of David Copperfield* and *Hellboy*). As another indication of the atypical nature of 2020, *Hellboy* appears in the top 10 list with earnings generated in just one territory, China. (It was released in other territories in 2019.)

The majority of titles in the top 10 opened initially in some territories in Q1, but *Tenet* was released in Q3 after some pandemic-related restrictions were lifted, while *Wonder Woman 1984* and *The Witches* were released in Q4.

Table 2 Top 10 UK qualifying films worldwide, released in 2020

Rank	Title	Country of origin	Worldwide box office gross (US$ million)
1	Tenet	UK/USA	292.7
2	Dolittle	UK/USA	206.8
3	1917	UK/USA	179.0
4	Wonder Woman 1984	UK/USA	117.0
5	The Gentlemen	UK/USA*	98.3
6	Emma	UK	24.6
7	The Witches	UK/USA	20.6
8	Cats	UK/USA	13.3
9	The Personal History of David Copperfield	UK/USA*	12.7
10	Hellboy	UK/USA*	12.4
	Total top 10		**977.4**

Source: BFI, Comscore

Notes:

'Box office gross' is a total of the takings from a selection of 23 markets (including the UK and Republic of Ireland), as reported by Comscore, and is cumulative gross box office, up to 18 February 2021, in territories where the film was released in 2020. Box office takings from territories where the film was released in 2019 or 2021 are not included in this total.

Figures may not sum to total due to rounding.

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

The top 10 highest grossing UK independent films released at the worldwide box office in 2020 earned $185 million (Table 3). While three UK independent titles in 2019 grossed more than $100 million worldwide, none did so in 2020, with only one film, *The Gentlemen*, coming close at $98 million. Four of the top 10 films (*Hellboy, 47 Meters Down: Uncaged, The Rhythm Section* and *The Aeronauts*) appear in the list from releases in three territories or fewer.

Table 3 Top 10 UK independent films worldwide, released in 2020

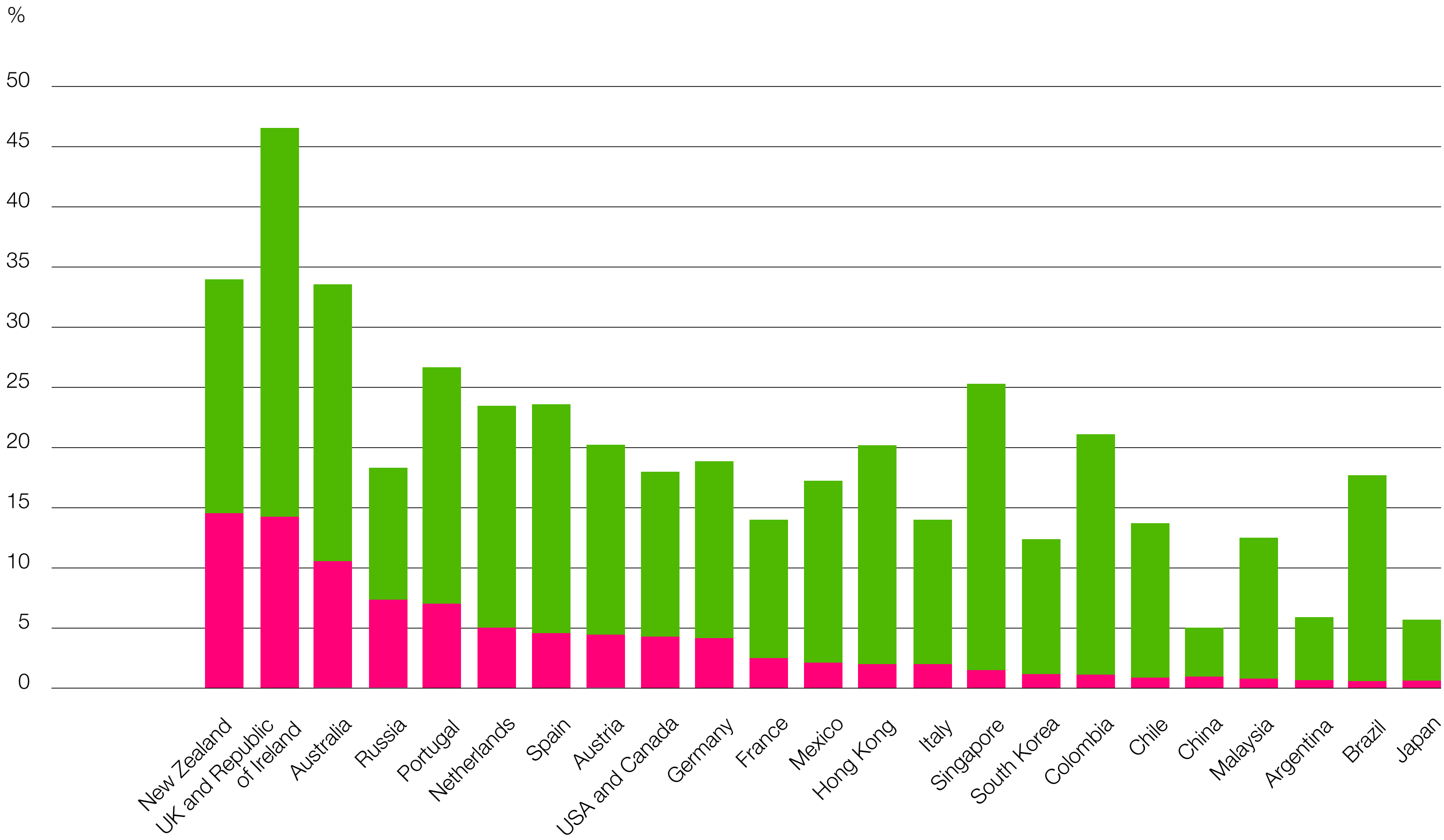
Rank	Title	Country of origin	Worldwide box office gross ($ million)
1	The Gentlemen	UK/USA	98.3
2	Emma	UK	24.6
3	The Personal History of David Copperfield	UK/USA	12.7
4	Hellboy	UK/USA	12.4
5	47 Meters Down: Uncaged	UK	8.4
6	Judy	UK	7.6
7	The Secret Garden	UK/Fra	7.1
8	The Rhythm Section	UK/USA	6.0
9	Military Wives	UK	4.5
10	The Aeronauts	UK/USA	3.6
	Total top 10		**185.2**

Source: BFI, Comscore

See notes to Table 2.

Figure 2 shows the market share of UK films in 23 selected global territories, ranked by the share for UK independent films. For the first time since our records began, New Zealand had the highest share for UK independent films of all the selected territories at 14.5%, slightly ahead of the UK and Republic of Ireland at 14.2%. This is an increase on 2019 from 13% for the UK and Republic of Ireland and 8% for New Zealand.

Figure 2 UK market share in selected global territories, 2020



	New Zealand	UK and Republic of Ireland	Australia	Russia	Portugal	Netherlands	Spain	Austria	USA and Canada	Germany	France	Mexico	Hong Kong	Italy	Singapore	South Korea	Colombia	Chile	China	Malaysia	Argentina	Brazil	Japan
UK studio-backed* films share (%)	19.4	32.3	23.0	11.0	19.6	18.4	19.0	15.8	13.7	14.7	11.5	15.1	18.2	12.0	23.8	11.2	20.0	12.8	4.1	11.7	5.2	17.1	5.1
UK independent films share (%)	14.5	14.2	10.5	7.3	7.0	5.0	4.6	4.4	4.3	4.1	2.5	2.1	2.0	2.0	1.5	1.2	1.1	0.9	0.9	0.8	0.7	0.6	0.6
Total UK share (%)	33.9	46.5	33.5	18.3	26.6	23.3	23.6	20.3	18.0	18.8	14.0	17.2	20.2	13.9	25.3	12.5	21.1	13.7	5.1	12.5	5.8	17.7	5.7

Source: BFI, Comscore
* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.
Figures may not sum to totals due to rounding.

UK films in North America

UK films earned $249 million at the box office in the USA and Canada in 2020, 18% of the total theatrical market (Table 4). The share for UK studio-backed titles was 14% ($190 million), the lowest share since 2014, and for UK independent films was 4.3% ($59 million), the highest share since our records began. Total box office revenues for all films released in North America in 2020 declined by almost 90% compared with 2019.

Table 4 UK market share in the USA and Canada, 2011-2020

Year	Total UK films share %	UK studio-backed films* share %	UK independent films share %
2011	16.5	15.3	1.2
2012	16.2	14.6	1.5
2013	11.9	10.5	1.4
2014	15.6	12.4	3.1
2015	28.8	25.6	3.2
2016	22.0	20.3	1.7
2017	29.1	26.4	2.7
2018	29.3	25.4	4.0
2019	36.1	32.2	3.9
2020	18.0	13.7	4.3

Source: BFI, Comscore
Notes:
Figures may not sum to totals due to rounding.
* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

The top 10 UK qualifying films released at the USA and Canada box office in 2020 grossed just under $245 million (Table 5). While none of the top 10 films released in the territory in 2019 were independent titles, the majority of films in the 2020 list were non studio-backed productions, with only *Dolittle, Tenet, Wonder Woman 1984* and *News of the World* being UK/USA studio films.

Tenet, Wonder Woman 1984, News of the World, The Personal History of David Copperfield, Possessor Uncut and *The Last Vermeer* all make the list with releases in Q3 or Q4, in spite of the impact of the COVID-19 pandemic.

Table 5 Top 10 UK films in the USA and Canada, released in 2020

Rank	Title	Country of origin	USA and Canada box office gross (US$ million)
1	Dolittle	UK/USA	78.5
2	Tenet	UK/USA	58.1
3	Wonder Woman 1984	UK/USA	41.8
4	The Gentlemen	UK/USA*	36.5
5	News of the World	UK/USA	11.4
6	Emma	UK	10.1
7	The Rhythm Section	UK/USA*	5.4
8	The Personal History of David Copperfield	UK/USA*	1.9
9	Possessor Uncut	UK/Can	0.8
10	The Last Vermeer	UK/USA*	0.7
	Total top 10		**245.1**

Source: BFI, Comscore
See notes to Table 2.
* Film made with independent (non-studio) US support.

UK films in Europe

Outside the UK and Republic of Ireland, the market share for UK films released in 2020 in a selection of other major European territories, including Russia, was 18%, a fall from 28.5% in 2019. Shares ranged from a high of 27% in Portugal to 14% in France and Italy (Table 6). The largest share for UK independent films was recorded in Russia (7.3%). *The Gentlemen* was the top UK independent film in all territories except for Italy, where it was not released. Overall, in the selected territories, UK independent films generated an average of 4% of box office revenues, the same as in 2019. The total gross for all films released in these territories in 2020 fell by 74% compared with 2019.

Table 6 UK market share in selected European territories, 2020 (ranked by share for UK independent films)

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio-backed films share (%)	UK independent films share (%)	Top UK independent film
Russia	51.8	18.3	11.0	7.3	The Gentlemen
Portugal	5.3	26.6	19.6	7.0	The Gentlemen
Netherlands	30.3	23.3	18.4	5.0	The Gentlemen
Spain	40.1	23.6	19.0	4.6	The Gentlemen
Austria	6.7	20.3	15.8	4.4	The Gentlemen
Germany	48.3	18.8	14.7	4.1	The Gentlemen
France	55.3	14.0	11.5	2.5	The Gentlemen
Italy	24.1	13.9	12.0	2.0	Sorry We Missed You
Total eight territories	**262.0**	**17.9**	**13.7**	**4.2**	**The Gentlemen**

Source: BFI, Comscore

See notes to Table 2.

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

Figures may not sum to totals due to rounding.

The most popular UK film in the selected European territories in 2020 was *Tenet* with an eight-territory gross of $78 million (Table 7). As in other territories in 2020, the top 10 list of highest earning films features a substantial share of non studio-backed productions, with half of the top 10 films in the selected European territories being UK independent titles.

Tenet, The Witches, Wonder Woman 1984 (only released in Spain and Portugal within these eight territories), *The Secret Garden* and *Radioactive* all make the list with releases in Q3 or Q4.

Table 7 Top 10 UK films in selected European territories, released in 2020

Rank	Title	Country of origin	Box office gross (US$ million)
1	Tenet	UK/USA	78.4
2	1917	UK/USA	63.6
3	Dolittle	UK/USA	43.6
4	The Gentlemen	UK/USA*	31.4
5	The Witches	UK/USA	7.3
6	Judy	UK	4.4
7	Wonder Woman 1984	UK/USA	4.3
8	The Secret Garden	UK/Fra	3.2
9	Sorry We Missed You	UK/Fra/Bel	2.1
10	Radioactive	UK	2.0
	Total eight territories		**240.5**

Source: BFI, Comscore
See notes to Table 2.
* Film made with independent (non-studio) US support.

UK films in Latin America

The overall market share for UK films in 2020 in the selected Latin American territories (Table 8) was 17%, a decrease from 36% in 2019; the share in individual territories ranged from a high of 21% in Colombia to 6% in Argentina. The highest grossing UK film across the five territories was *Dolittle* with combined box office earnings of $15 million, while the top earning UK independent film was *The Gentlemen* ($8 million). The overall share for UK independent films was 1%, down from 2% in 2019. The total gross for all films released in these territories in 2020 fell by 87% compared with 2019.

Table 8 UK market share in selected Latin American territories, 2020 (ranked by share for UK independent films)

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio-backed films share (%)	UK independent films share (%)	Top UK independent film
Mexico	26.4	17.2	15.1	2.1	The Gentlemen
Colombia	5.8	21.1	20.0	1.1	The Gentlemen
Chile	1.8	13.7	12.8	0.9	The Current War
Argentina	1.5	5.8	5.2	0.7	Judy
Brazil	16.9	17.7	17.1	0.6	Judy
Total five territories	**52.4**	**16.6**	**15.2**	**1.4**	**The Gentlemen**

Source: BFI, Comscore
See notes to Table 2.
Figures may not sum to totals due to rounding.

UK films in Asia

The overall market share for UK films across the selected Asian territories (Table 9) was 6%, down from 18.5% in 2019. Shares ranged from a high of 25% in Singapore to 5% in China. The share for UK independent films ranged from 2% in Hong Kong to 1% in Japan. The total gross for all films released in these territories in 2020 fell by 66% compared with 2019.

*Tene*t was the most successful UK film overall across the six Asian territories in 2020, with combined earnings of $117 million, while *Hellboy* ($12 million) was the top earning UK independent film (it was only released in China). The 5% share for UK films in China was the smallest of any territory analysed in this chapter but it should be noted that China has a quota system which limits the number of foreign films shown in the territory; in 2020 less than 10 UK independent titles were released. Overall UK independent films had a 1% share of these markets, the same as in 2019.

Table 9 UK market share in selected Asian territories, 2020 (ranked by share for UK independent films)

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio-backed films share (%)	UK independent films share (%)	Top UK independent film
Hong Kong	13.0	20.2	18.2	2.0	The Gentlemen
Singapore	9.3	25.3	23.8	1.5	The Gentlemen
South Korea	44.0	12.5	11.2	1.2	Escape From Pretoria
China	150.8	5.1	4.1	0.9	Hellboy
Malaysia	4.7	12.5	11.7	0.8	The Gentlemen
Japan	66.3	5.7	5.1	0.6	Downton Abbey
Total six territories	**288.2**	**6.2**	**5.3**	**0.9**	**Hellboy**

Source: BFI, Comscore
See notes to Table 2.
Figures may not sum to total due to rounding.

UK films in Australasia

The overall market share for UK films in the two Australasian territories (Table 10) was 34%, down from 40% in 2019. *Wonder Woman 1984* ($19.5 million) was the top earning UK title overall in both territories, while *The Gentlemen* ($12 million) was the top grossing UK independent film. UK independent films had an 11% share of the combined box office, an increase from 7% in 2019. The total gross for all films released in the Australasian territories in 2020 fell by 70% compared with 2019.

Table 10 UK market share in selected Australasian territories, 2020 (ranked by share for UK independent films)

Territory	Box office for UK films (US$ million)	Total UK films share (%)	UK studio-backed films share (%)	UK independent films share (%)	Top UK independent film
New Zealand	14.8	33.9	19.4	14.5	The Gentlemen
Australia	82.2	33.5	23.0	10.5	The Gentlemen
Total two territories	**97.0**	**33.6**	**22.5**	**11.1**	**The Gentlemen**

Source: BFI, Comscore
See notes to Table 2.

UK talent and the global box office, 2011-2020

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

Table 11 shows the global cultural and commercial influence of UK filmmaking skills and talent. Nine of the top 20 highest grossing films released worldwide between 2011 and 2020 were UK qualifying films, while 17 of the top 20 films feature British actors in lead or supporting roles. One of these films, *Harry Potter and the Deathly Hallows: Part 2*, was helmed by a British director (David Yates) and based on a novel by a UK writer (JK Rowling). Also appearing in the top 20 is *Captain America: Civil War* which features superhero characters created by American writers Joe Simon and Jack Kirby, however the story for the film was based on a series of comic books penned by the British writer Mark Millar.

Unsurprisingly, considering the impact the COVID-19 pandemic had on global box office revenues, no releases from 2020 appear in the top 20.

Table 11 Top 20 grossing films worldwide, 2011-2020

Rank	Title	Year	Gross box office (US$ million)	Country of origin	UK talent / director / source material
1	Avengers: Endgame	2019	2,797.5	UK/USA	Supporting actors
2	Star Wars: Episode VII - The Force Awakens	2015	2,069.5	UK/USA	Lead and supporting actors
3	Avengers: Infinity War	2018	2,048.4	UK/USA	Lead and supporting actors
4	Jurassic World	2015	1,672.4	USA	
5	The Lion King	2019	1,657.1	UK/USA	Lead and supporting actors
6	Marvel Avengers Assemble	2012	1,519.6	USA	Supporting actors
7	Fast & Furious 7	2015	1,518.7	USA	Supporting actors
8	Frozen II	2019	1,435.4	USA	
9	Avengers: Age of Ultron	2015	1,405.4	UK/USA	Supporting actors
10	Black Panther	2018	1,347.2	USA	Supporting actors
11	Harry Potter and the Deathly Hallows: Part 2	2011	1,341.0	UK/USA	Lead and supporting actors; director; source material
12	Star Wars: Episode VIII - The Last Jedi	2017	1,332.5	UK/USA	Lead and supporting actors
13	Jurassic World: Fallen Kingdom	2018	1,308.7	UK/USA	Supporting actors
14	Frozen	2013	1,276.7	USA	Supporting actors
15	Beauty and the Beast	2017	1,263.7	UK/USA	Lead and supporting actors
16	Incredibles 2	2018	1,242.7	USA	
17	Fast & Furious 8	2017	1,237.7	USA	Lead and supporting actors
18	Iron Man 3	2013	1,216.4	USA/Chn	Supporting actors
19	Minions	2015	1,168.0	USA/Fra	Supporting actors
20	Captain America: Civil War	2016	1,153.6	USA/Ger	Supporting actors

Source: BFI, Comscore

Note: Gross box office is studio-reported so may include grosses from all global territories, not just the 23 territories analysed earlier in the chapter.

UK source material

The global box office performance of UK films and foreign productions which draw on UK source material is a good indicator of the international impact and exposure of British culture. Of the top 200 grossing films released worldwide between 2011 and 2020, 22 are based on stories and characters created by UK writers, and collectively these films have earned $15 billion at the global box office, 11% of the total gross from the top 200 films (Table 12).

As the original creative voice behind three of the top 200 earning films since 2011, JRR Tolkien is the most influential UK author in the top 200 list with the trilogy of films based on *The Hobbit grossing* $2.9 billion at the box office. JK Rowling is a close second with $2.8 billion from three films (one Harry Potter title and two Fantastic Beasts titles). The list also includes two films based on the James Bond novels by Ian Fleming ($2.0 billion), three films based on the Fifty Shades book series by EL James ($1.3billion), two films based on the How to Train Your Dragon series of novels by Cressida Cowell ($1.1 billion), and two films based on the Kingsman graphic novels created by Dave Gibbons and Mark Millar ($0.8 billion).

In addition to films adapted from previously published works, the 22 films include a number of titles based on original screenplays, two of which - *Interstellar* and *Dunkir*k - were written or co-written by Christopher Nolan. (Nolan also co-wrote the script for another top 200 title - *The Dark Knight Rises*.)

Table 12 Top grossing films worldwide based on stories and characters created by UK writers, 2011-2020

Rank	Title	Year	Gross box office (US$ million)	Country of origin	UK source material
1	Harry Potter and the Deathly Hallows: Part 2	2011	1,341.0	UK/USA	Novel by JK Rowling
2	Skyfall	2012	1,108.7	UK/USA	Novels by Ian Fleming
3	The Hobbit: An Unexpected Journey	2012	1,021.1	USA/NZ	Novel by JRR Tolkien
4	The Jungle Book	2016	967.3	UK/USA	Stories by Rudyard Kipling
5	The Hobbit: The Desolation of Smaug	2013	960.6	USA/NZ	Novel by JRR Tolkien
6	The Hobbit: The Battle of the Five Armies	2014	956.1	USA/NZ	Novel by JRR Tolkien
7	Spectre	2015	880.8	UK/USA	Novels by Ian Fleming
8	Fantastic Beasts and Where to Find Them	2016	812.6	UK/USA	Original screenplay by JK Rowling
9	Interstellar	2014	674.4	USA	Original screenplay by Christopher and Jonathan Nolan
10	Fantastic Beasts: The Crimes of Grindelwald	2018	652.4	UK/USA	Original screenplay by JK Rowling
11	Sing	2016	634.1	USA	Original screenplay by Garth Jennings
12	How to Train Your Dragon 2	2014	621.4	USA	Novel by Cressida Cowell
13	Fifty Shades of Grey	2015	571.0	USA	Novel by EL James
14	Sherlock Holmes: A Game of Shadows	2011	545.7	UK/USA	Novels by Arthur Conan Doyle
15	Dunkirk	2017	528.8	UK/USA	Original screenplay by Christopher Nolan
16	How to Train Your Dragon: The Hidden World	2019	522.2	USA	Novel by Cressida Cowell
17	Kingsman: The Secret Service	2015	418.5	UK/USA	Novel by Dave Gibbons and Mark Millar
18	Kingsman: The Golden Circle	2017	410.9	UK/USA	Novel by Dave Gibbons and Mark Millar
19	Mamma Mia! Here We Go Again	2018	393.4	UK/USA	Musical by Catherine Johnson
20	Fifty Shades Darker	2017	381.6	USA	Novel by EL James
21	Fifty Shades Freed	2018	371.4	USA	Novel by EL James
22	1917	2019	368.2	UK/USA	Original screenplay by Sam Mendes and Krysty Wilson-Cairns

Source: BFI, Comscore

UK actors

The global prominence of UK acting talent is reflected in Table 13 which shows that 68% of the top 200 films at the worldwide box office since 2011 have featured British actors in either lead/title roles or in the supporting cast. In total, these films generated 71% of the overall gross for the top 200 titles.

Table 13 UK acting talent in the top 200 grossing films worldwide, 2011-2020

Films that have…	Number or films	Top 200 gross box office (US$ billion)	% of total gross for top 200 films
UK lead actor(s)	51	39.1	27.4
UK supporting actor(s)	125	94.5	66.3
UK lead and/or supporting actor(s)	136	101.8	71.4

Source: BFI, Comscore
Note: Includes live action and animated titles.

UK directors

Twenty-nine of the 200 highest grossing films at the global box office between 2011 and 2020 were helmed by British directors, generating a box office gross of over $18 billion (Table 14). David Yates was the most commercially successful British director of the decade, with total top 200 box office takings of $2.8 billion from the final film in the Harry Potter series and the two Fantastic Beasts spin-offs. No 2020 films from UK directors appear in the top 200 list, however, Sam Mendes's *1917* was released in most territories in 2020. One woman features amongst the 18 UK directors – Sam Taylor-Johnson, whose *Fifty Shades of Grey* made $571 million.

Table 14 UK directors of the top 200 grossing films worldwide, 2011-2020

Rank	Director	Film	Year	Total gross box office (US$ million)
1	David Yates	Harry Potter and the Deathly Hallows: Part 2	2011	1,341.0
		Fantastic Beasts and Where to Find Them	2016	812.6
		Fantastic Beasts: The Crimes of Grindelwald	2018	652.4
		Total		**2,806.0**
2	Sam Mendes	Skyfall	2012	1,108.7
		Spectre	2015	880.8
		1917	2019	368.2
		Total		**2,357.7**
3	Christopher Nolan	The Dark Knight Rises	2012	1,085.1
		Interstellar	2014	674.4
		Dunkirk	2017	528.8
		Total		**2,288.3**
4	Guy Ritchie	Aladdin	2019	1,051.0
		Sherlock Holmes: A Game of Shadows	2011	545.7
		Total		**1,596.7**
5	Gareth Edwards	Rogue One: A Star Wars Story	2016	1,056.5
		Godzilla	2014	527.9
		Total		**1,584.4**

Table 14 UK directors of the top 200 grossing films worldwide, 2011-2020 (continued)

Rank	Director	Film	Year	Total gross box office (US$ million)
6	Ridley Scott	The Martian	2015	630.5
		Prometheus	2012	403.8
		Total		**1,034.3**
7	Kenneth Branagh	Cinderella	2015	543.6
		Thor	2011	448.7
		Total		**992.3**
8	Matthew Vaughn	Kingsman: The Secret Service	2015	418.5
		Kingsman: The Golden Circle	2017	410.9
		Total		**829.4**
9	Garth Jennings	Sing	2016	634.1
10	Sam Taylor-Johnson	Fifty Shades of Grey	2015	571.0
11	Rupert Wyatt	Rise of the Planet of the Apes	2011	482.9
12	Tom Hooper	Les Misérables	2012	442.1
13	Duncan Jones	Warcraft	2016	433.6
14	Paul Greengrass	Jason Bourne	2016	416.4
15	Rupert Sanders	Snow White and the Huntsman	2012	401.0
16	Ol Parker	Mamma Mia! Here We Go Again	2018	393.4
17	Simon J Smith	Penguins of Madagascar	2014	373.0
18	Corin Hardy	The Nun	2018	365.0

Source: BFI, Comscore

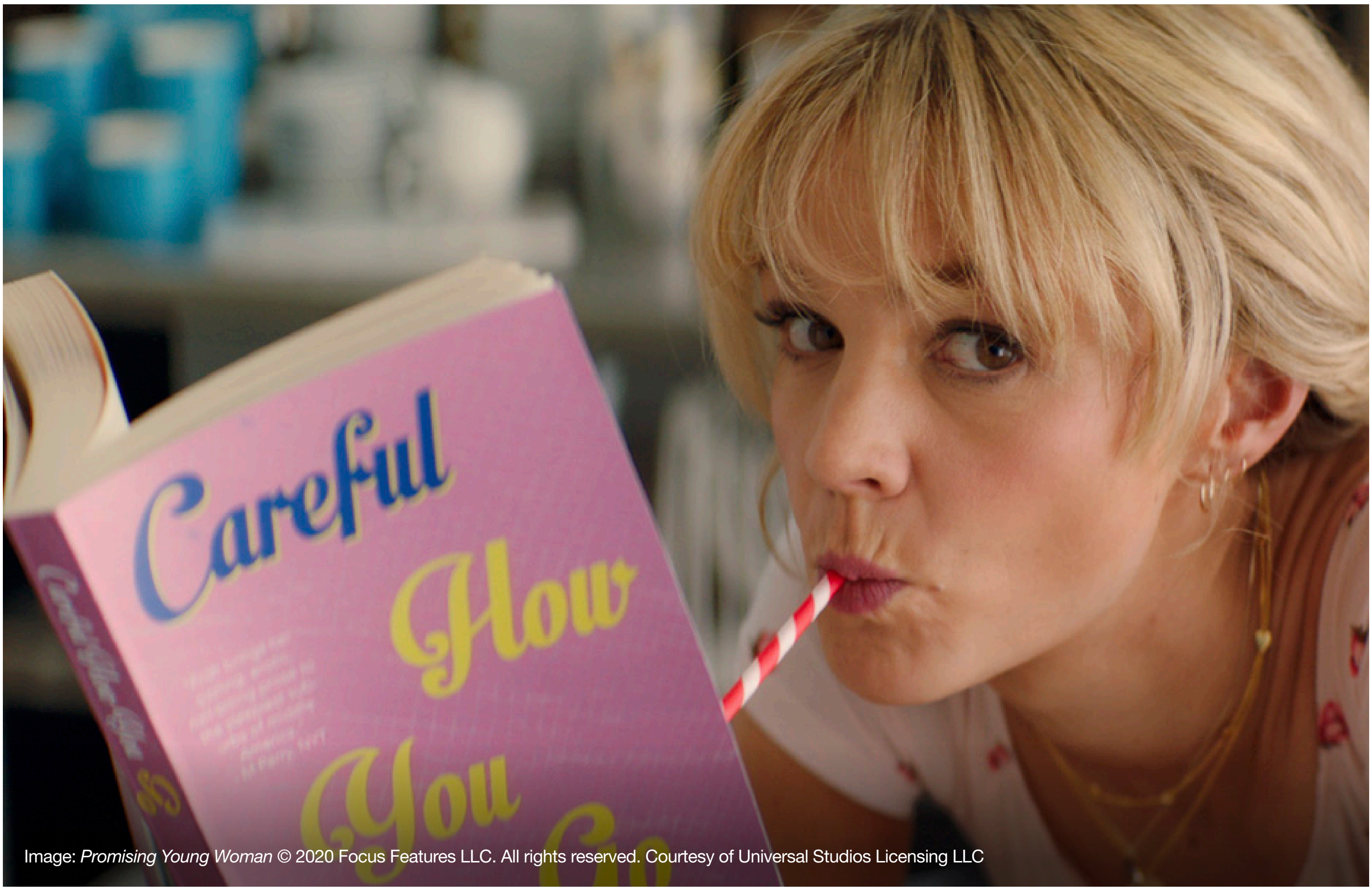


Image: *Promising Young Woman* © 2020 Focus Features LLC. All rights reserved. Courtesy of Universal Studios Licensing LLC

Awards for UK films and talent

Awards and nominations are an important tool for raising the critical reputation and international profile of UK film. This section shows the awards won by UK films and individuals at two major international award ceremonies (the Academy Awards® and BAFTA Film Awards) and the major international film festivals (Berlin, Cannes, Sundance, Toronto and Venice) in the 2020/21 awards cycle. (For the purposes of this analysis we consider the awards cycle to start with the Sundance Film Festival in January of a particular year and end with the Academy Awards® of the following year.)

While the global COVID-19 pandemic meant that most of the festivals and ceremonies were required to hold their events either virtually or in-person with social distancing, with the exception of Cannes, this did not substantially affect the number of awards available. Cannes, which usually presents more than 30 awards, held a shortened event and only awarded prizes for the Short Film Palme d'Or and the Cinéfondation film school competition.

UK films and talent won 32 awards, 21% of all available awards in the 2020/21 awards cycle (Table 15). The table also shows the total number of awards won in the calendar year 2020, to provide a comparison with previous years. In 2020, UK films and talent won 29 awards, representing 20% of the prizes available. (Awards specific to foreign nationals or films, for example the Toronto International Film Festival's award for Best Canadian Film, are not included in the analysis).

Of the 32 awards presented to British films and talent in the 2020/21 awards cycle, a total of 13 were won or shared by British women or by British films made by women. Among the winners were Emerald Fennell who was named as a recipient on three awards, including both a BAFTA and Oscar® for her original screenplay, *Promising Young Woman*, and Ana Rocha de Sousa who won two awards at the Venice Film Festival for her London-set debut feature *Listen*.

Table 15 Numbers of UK award winners, 2011-2020/21

Year	Number of UK award winners	UK share %
2011	30	15
2012	23	14
2013	24	13
2014	28	19
2015	24	16
2016	29	15
2017	22	12
2018	28	14
2019	26	14
2020	29	20
Total (to end of 2020)	**263**	**14.5**
2017/18 awards cycle	*33*	*18*
2018/19 awards cycle	*25*	*13*
2019/20 awards cycle	*27*	*15*
2020/21 awards cycle	*32*	*21*

Source: BFI

British films and filmmakers won prizes at four of the major film festivals in 2020 (Table 16). British talent was recognised with two awards at Sundance, two at Berlin, four at Venice, and two at Toronto, along with 14 BAFTA awards and eight Oscars®. UK talent won all four screenwriting awards at the BAFTAs and Oscars®: Christopher Hampton won both adapted screenplay awards for co-writing *The Father*, and Emerald Fennell won both original screenplay awards for *Promising Young Woma*n. Other British prize winners who won respective awards at both the BAFTAs and Oscars® were Daniel Kaluuya who won the supporting actor awards for his role in *Judas and the Black Messiah*; Atticus Ross who won at both ceremonies for his work on the soundtrack for *Soul*; James Reed, who co-directed best documentary winner *My Octopus Teache*r; and Andrew Jackson and Andrew Lockley, who won two awards for their work on *Tenet's* visual effects.

Table 16 UK award winners, 2020/21

Award ceremony/ festival	Award	Recipient	Title
Sundance Film Festival, 23 January - 2 February 2020	Audience Award - World Cinema Documentary	Film; award presented to Jerry Rothwell	The Reason I Jump
	Special Jury Award for Acting - World Cinema Dramatic	Ben Whishaw	Surge
Berlin International Film Festival, 20 February - 1 March 2020	FIPRESCI Prize - Panorama	Film; (award presented to Bassam Tariq)	Mogul Mowgli
	Honorary Golden Bear	Helen Mirren	-
Venice International Film Festival, 2-12 September 2020	Golden Lion for Lifetime Achievement	Tilda Swinton	-
	"Luigi De Laurentiis" Award for a Debut Film	Film; (award presented to Ana Rocha de Sousa)	Listen
	Special Orizzonti Jury Prize	Film; (award presented to Ana Rocha de Sousa)	Listen
	Volpi Cup for Best Actress	Vanessa Kirby	Pieces of a Woman
Toronto International Film Festival, 10-19 September 2020	TIFF Tribute Actor Award	Kate Winslet	-
	TIFF Tribute Actor Award	Anthony Hopkins	-
British Academy Film Awards 10-11 April 2021	Adapted Screenplay	Christopher Hampton (with Florian Zeller)	The Father
	British Short Animation	Film; award presented to Mole Hill and Laura Duncalf	The Owl and the Pussycat
	British Short Film	Film; award presented to Farah Nabulsi	The Present
	Casting	Lucy Pardee	Rocks
	Cinematography	Joshua James Richards	Nomadland
	Documentary	Film; award presented to James Reed (with Pippa Ehrlich and Craig Foster)	My Octopus Teacher
	Leading Actor	Anthony Hopkins	The Father
	Original Score	Atticus Ross (with Jon Batiste and Trent Reznor)	Soul
	Original Screenplay	Emerald Fennell	Promising Young Woman
	Outstanding British Film	Film; award presented to Emerald Fennell and Josey McNamara (with Ben Browning and Ashley Fox)	Promising Young Woman
	Outstanding Debut by a British Writer, Director or Producer	Remi Weekes	His House
	Rising Star Award	Bukky Bakray	-
	Special Visual Effects	Andrew Jackson and Andrew Lockley (with Scott Fisher)	Tenet
	Supporting Actor	Daniel Kaluuya	Judas and the Black Messiah
Academy Awards®, 25 April 2021	Actor in a Leading Role	Anthony Hopkins	The Father
	Actor in a Supporting Role	Daniel Kaluuya	Judas and the Black Messiah
	Documentary (Feature)	Film; award presented to James Reed (with Pippa Ehrlich and Craig Foster)	My Octopus Teacher
	Music (Original Score)	Atticus Ross (with Jon Batiste and Trent Reznor)	Soul
	Visual Effects	Andrew Jackson, David Lee and Andrew Lockley (with Scott Fisher)	Tenet
	Short Film (Live Action)	Film; award presented to Martin Desmond Roe (with Travon Free)	Two Distant Strangers
	Writing (Adapted Screenplay)	Christopher Hampton (with Florian Zeller)	The Father
	Writing (Original Screenplay)	Emerald Fennell	Promising Young Woman

Source: BFI RSU
Notes:
Awards for films are listed if either the film itself qualifies as a UK production or if any of the named presentees are British.
Awards for individuals are listed if any of the named recipients are British.

DISTRIBUTION

Cover image: *After We Collided* courtesy of Shear Entertainment

FACTS IN FOCUS

For the majority of 2020, cinemas were closed or operating at limited capacity due to the COVID-19 pandemic, causing distributors to delay the release of a large number of films, including planned tentpole releases. The total box office for all films on release in the year was £311 million, a fall of 76% from £1.3 billion in 2019.

- Films from the top 10 distributors generated 92.5% of the total box office for all titles on release in 2020.
- Entertainment One was the top earning distributor in 2020, with 30 films making £49 million at the UK and Republic of Ireland box office (including the top earning release of the year, *1917*, which grossed £44 million).
- Entertainment Film Distributors was the top earning distributor of UK independent films released in 2020, with its sole release *The Gentlemen* grossing £12 million.
- StudioCanal was the top earning distributor of foreign language films released in 2020, with nine releases grossing £12 million.
- In 2020, 63% of box office revenue was taken during weekends (Friday to Sunday), up from 59.5% in 2019.

Distribution

Distributors – all films on release

The distribution sector faced many challenges in 2020 due to the COVID-19 pandemic. All cinemas temporarily closed in March, the gradual re-opening of cinemas in Q3 was impacted by continued social distancing measures which limited capacity, and there were additional nationwide closures in Q4. As a consequence, a substantial number of planned releases from Q2 onwards were delayed into 2021.

Table 1 shows box office takings by distributor for all films on release in the UK and Republic of Ireland during 2020 (including titles released prior to 2020). The overall box office gross for all films on release in 2020 (£311 million) was just 24% of 2019's figure (£1.3 billion). The top 10 distributors had a market share of 92.5% (down from 95% in 2019) from 392 titles on release (up from 310 in 2019). In total, 926 films were on release in 2020, down from 1,154 in 2019. For the first time since our records began in 1997, an independent distributor, Entertainment One, was the top earning distributor, with 30 films on release (including 2020's highest grossing release, *1917*) generating revenues of £49 million.

After re-opening in Q3, many cinemas chose to schedule a variety of popular, older films to entice audiences back, with many films being picked from the Film Distributors' Association's *Relaunching Cinema: Content for Recovery* collection. This is reflected in the increased share of older films (59% of all films on release in 2020, compared with 30% in 2019).

For eight of the top 10 distributors the majority of box office revenues were generated by films initially released before Q2 (including Walt Disney, whose highest grossing film in the year was 2019's *Star Wars: The Rise of Skywalker*). For Warner Bros, however, its Q3 and Q4 releases, which included *Tenet, Wonder Woman 1984, Cats & Dogs: Paws Unite!* and *Bill & Ted Face the Music*, generated a greater cumulative gross than its earlier releases. Shear Entertainment also found success with its Q3 release *After We Collided.*

Table 1 Distributor share of box office, UK and Republic of Ireland, all films on release 2020

Distributor	Market share in 2020 (%)	Number of films on release in 2020	Box office gross in 2020 (£ million)	Number of films on release in 2019
Entertainment One	15.9	30	49.4	28
Sony	15.6	38	48.4	39
Walt Disney	14.3	58	44.3	47
Universal	12.5	73	39.0	55
Warner Bros	11.7	89	36.5	64
Paramount	8.0	22	25.0	13
Lionsgate	4.5	29	14.0	23
StudioCanal	4.5	46	13.9	31
Entertainment Film Distributors	4.3	6	13.3	10
Shear Entertainment*	1.3	1	4.0	n/a
Top 10	92.5	392	287.8	310
Other distributors (143)	7.5	534	23.2	844
Total	**100.0**	**926**	**311.0**	**1,154**

Source: Comscore
Notes:
Box office gross = cumulative total for all films handled by the distributor in the period 3 January 2020 to 31 December 2020.
Number of films on release in 2019 updated since publication of the 2020 Yearbook due to Comscore adjustments.
Figures may not sum to sub-totals/totals due to rounding.
* Shear Entertainment also released one film in 2020 in conjunction with The Movie Partnership, and two films in 2019 in conjunction with Noah Media and Spirit Entertainment.

Table 2 shows the top 10 distributors by market share between 2011 and 2020. Nine of the 2020 top 10 have appeared in the list before, six of which have featured in every top 10 list over the period. The exceptions are Lionsgate, Optimum/StudioCanal and Entertainment Film Distributors, which have appeared nine times, and Shear Entertainment, which features in the list for the first time. From 2011-2019 the average market share for distributors outside the top 10 was 4%, however, in 2020 this increased to 7.5%, the highest share since 2009.

Table 2 Distributor market share as percentage of box office gross, 2011-2020 (ranked by 2020 market share)

Distributor	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Entertainment One	5.1	6.7	9.0	8.0	3.9	8.4	2.5	3.2	3.8	15.9
Sony	7.2	18.0	8.7	6.2	11.8	6.6	10.3	10.7	9.3	15.6
Walt Disney	8.7	10.2	15.2	10.1	20.0	23.2	19.7	23.6	37.9	14.3
Universal	11.8	10.7	15.1	11.2	21.6	14.0	16.0	19.5	13.9	12.5
Warner Bros	18.2	12.9	17.2	15.9	9.0	15.6	16.6	13.9	12.4	11.7
Paramount	16.3	7.7	7.8	5.8	4.0	5.4	3.7	4.8	5.9	8.0
Lionsgate	-	5.7	4.7	5.5	4.0	4.0	6.3	1.5	4.2	4.5
Optimum/StudioCanal[1]	3.8	-	2.8	6.7	4.7	1.5	4.2	2.8	1.0	4.5
Entertainment Film Distributors	6.7	3.1	1.9	5.2	1.6	1.5	1.7	1.1	-	4.3
Shear Entertainment	-	-	-	-	-	-	-	-	-	1.3
20th Century Fox[2]	12.1	16.1	13.1	21.8	14.9	15.7	15.1	14.5	5.7	-
STX Entertainment	-	-	-	-	-	-	-	-	1.2	-
Momentum[3]	4.6	4.3	-	-	-	-	-	-	-	-
Top 10 total[4]	94.4	95.4	95.5	96.3	95.5	95.9	96.1	95.5	95.4	92.5
Others	5.6	4.6	4.5	3.7	4.5	4.1	3.9	4.5	4.6	7.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Comscore
Notes:
[1] Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.
[2] 20th Century Fox films released after October 2019 are categorised as Walt Disney distributed releases.
[3] Momentum was taken over by Entertainment One in January 2014.
[4] Top 10 total refers to the top 10 distributors of that particular year.

Distributors – foreign language and UK independent films released in 2020

Foreign language films accounted for 36% of new releases at the UK and Republic of Ireland box office in 2020, grossing a total of £18 million (7% of the total box office for films released in 2020). Fifty-two distributors handled 136 foreign language film releases in the year. The top 10 distributors released 34% of these films, which accounted for 90% of the total box office for foreign language films.

StudioCanal was the year's top earning foreign language film distributor (Table 3). Its Q1 release of the South Korean film *Parasite* became the UK's all-time highest grossing foreign language film, with earnings of £12 million, 66% of the overall box office for non-English language releases. (For more on the year's top earning foreign language titles, see the Top films in 2020 chapter.)

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2020 (ranked by box office gross)

Distributor	Number of foreign language films released in 2020	Average widest point of release	Box office gross (£ million)
StudioCanal	9	87	12.3
Magnetes Pictures	8	92	0.7
Signature Entertainment	3	136	0.6
Curzon Artificial Eye	7	16	0.6
National Amusements	1	268	0.6
Cinestaan AA Distributors	3	53	0.4
Sun Media	7	20	0.4
Hamsini Entertainment	5	45	0.4
Phoenix	1	256	0.3
Walt Disney	1	116	0.3

Source: Comscore
Box office gross = cumulative total up to 18 February 2021.

In total, 54 distributors released independent UK films in 2020, generating a combined box office gross of £35 million (14% of the total box office for films released in 2020) from 91 releases. The 25 films released by the top 10 distributors of independent UK titles accounted for £33 million, which equates to 95% of the box office generated by these films (Table 4). Entertainment Film Distributors had the largest share of box office for UK independent films from one title, the Q1 release *The Gentlemen*.

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2020 (ranked by box office gross)

Distributor	Number of UK independent films released in 2020	Average widest point of release	Box office gross (£ million)
Entertainment Film Distributors	1	516	12.3
Lionsgate	4	375	9.1
Universal	3	327	7.6
StudioCanal	4	122	1.0
Sony	2	277	0.8
Paramount	2	365	0.8
Sky Cinema	1	201	0.7
Walt Disney	1	511	0.5
Altitude Film Distribution	2	65	0.3
Signature Entertainment	5	48	0.2

Source: Comscore, BFI RSU analysis
Box office gross = cumulative total up to 18 February 2021.

Width of release

Table 5 shows the number and share of films released in the UK and Republic of Ireland from 2016 to 2020 by widest point of release (WPR). As in previous years, in 2020 the majority of films (58%) were shown at fewer than 50 sites at their widest point of release. Of the 20 films with a WPR of 500 or over, 16 were Q1 releases. Only one Q3 or Q4 release – *Tenet* – was shown at 600 sites or over.

Table 5 Number and share of releases by widest point of release, 2016-2020

	2016		2017		2018		2019		2020	
Sites at widest point of release	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases
>=600	21	2.6	29	3.8	15	1.9	38	5.0	9	2.4
500-599	40	4.9	34	4.5	43	5.5	34	4.5	11	2.9
400-499	45	5.5	33	4.3	40	5.1	32	4.2	17	4.5
300-399	19	2.3	24	3.2	22	2.8	26	3.4	13	3.4
200-299	18	2.2	24	3.2	29	3.7	16	2.1	21	5.5
100-199	59	7.2	53	7.0	53	6.7	58	7.6	46	12.0
50-99	58	7.1	79	10.4	82	10.4	77	10.1	44	11.5
10-49	244	29.7	224	29.5	224	28.5	256	33.5	110	28.8
<10	317	38.6	260	34.2	279	35.5	227	29.7	111	29.1

Source: Comscore, BFI RSU analysis
Note: Percentages may not sum to totals due to rounding.
Only includes films released within each year.

Weekend box office

In 2020, 63% of box office revenue was generated during weekends (Friday to Sunday), up from 59.5% in 2019 (Table 6). This is the only year between 2011 and 2020 that the weekend share was above 60% and may be due, in part, to some cinemas only opening at weekends during the latter part of the year. The pattern of box office takings by day has remained largely consistent throughout the period with the exception of the middle of the working week, which was boosted for the first few years by the ‘Orange/EE Wednesdays’ promotion.

Table 6 Box office percentage share by weekday/weekend 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Friday	16.6	16.4	15.8	15.3	15.3	16.1	15.7	15.5	15.3	16.1
Saturday	23.8	24.1	24.9	25.2	23.9	24.6	24.7	24.1	24.6	27.2
Sunday	17.6	17.6	18.2	18.8	18.8	18.3	18.9	19.1	19.6	20.0
Weekend	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**	**58.7**	**59.5**	**63.2**
Monday	9.2	9.3	8.9	9.1	9.5	9.7	8.7	9.6	9.6	8.1
Tuesday	9.1	9.3	9.4	9.4	10.6	10.4	10.3	10.0	10.1	9.4
Wednesday	13.9	13.4	12.6	12.4	10.8	10.9	11.3	11.2	10.0	9.9
Thursday	9.8	9.8	10.2	9.8	10.9	10.1	10.6	10.6	10.9	9.3
Weekday	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**	**41.3**	**40.6**	**36.8**

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

The opening weekend is recognised as being crucial to the success of a film, as a strong opening may encourage exhibitors to continue to screen a film. In 2020, 27% of total theatrical revenue was generated during opening weekends, the second lowest figure of the period (Table 7). Only one film – *1917* – made more than £30 million in 2020, and no films made between £20 million-£29.9 million (compared with 10 and seven films respectively in 2019).

For many films the opening weekend box office represents a significant proportion of their final theatrical gross. As in previous years, in 2020, films that made less than £1 million at the box office tended to make more of their total box office revenue in their opening weekend than higher grossing films.

Table 7 Opening weekend as percentage of total box office, by box office band, 2011-2020

Range of box office (£ million)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
>=30	29.4	27.0	24.0	27.1	32.2	27.2	26.5	26.9	30.1	16.9
20-29.9	22.6	22.4	30.9	21.9	25.9	28.0	33.3	24.7	24.7	-
10-19.9	27.6	24.6	27.6	30.9	25.6	29.1	28.5	25.3	24.8	25.2
5-9.9	26.2	26.1	28.4	25.9	28.7	32.2	33.2	29.5	28.7	30.7
1-4.9	32.2	31.8	32.1	30.3	32.3	33.1	32.1	34.5	31.0	30.3
0.2-0.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1	35.6	39.1	42.1
<0.2	38.5	37.8	38.3	40.0	39.6	39.6	41.4	41.6	43.9	43.0
All films	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**	**27.9**	**28.9**	**27.4**

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

Film advertising

With distributors having significantly fewer new films to promote in 2020 due to the pandemic, advertising spend was down substantially compared with previous years. Nielsen estimates that the total advertising spend by distributors in 2020 was £48 million, around a quarter of the figure in 2019 (Table 8).

It should be noted that the data for digital advertising only covers desktop/mobile display and pre-roll advertising; they do not include estimates for advertising on social media platforms or websites that require a log-in, search advertising or pay-per-click. The value of internet advertising as reported in the table represents 20% of the total advertising spend for film in 2020. However, as the data for this category are not wholly comprehensive, we believe this share to be an underestimate.

Table 8 Estimated advertising spend 2011-2020 (£ million)

Medium	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TV	90.8	89.1	89.2	101.0	102.2	93.3	81.1	79.2	67.2	14.5
Outdoor	69.1	67.2	71.2	64.2	60.5	52.8	56.5	54.9	73.1	19.1
Press	22.0	21.5	20.7	24.2	21.3	14.9	14.0	10.8	9.2	2.3
Radio	6.8	6.8	5.9	4.6	7.4	5.7	12.1	8.7	11.1	2.7
Sub-total	188.7	184.6	187.0	194.0	191.4	166.7	163.7	153.6	160.6	38.5
Digital*	8.5	4.0	2.5	1.1	0.7	46.4	65.5	43.7	40.5	9.9
Total	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**	**197.5**	**201.1**	**48.4**

Source: Nielsen Media Research
Notes:
Figures may not sum to totals/sub-totals due to rounding.
* The figures for 2014 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2011-2013, 2014-2015 and 2016-2020.

Table 9 shows the share of advertising spend on traditional media (television, outdoor, print and radio) only from 2011 to 2020. It does not include digital advertising activity due to the reporting limitations described above.

While expenditure on TV advertising had consistently accounted for around half of the total spend on traditional media up until 2018, it fell to 42% in 2019 and to 38% in 2020. In both 2019 and 2020 the category with the highest spend was outdoor advertising; in 2020 it accounted for 49.5% of total expenditure on traditional media.

The share of spend on press advertising has been on an overall downward trend over the period (due in part to falling newspaper and magazine circulations) decreasing from 12% in 2011 to 6% in 2019 and 2020. Conversely, the share of advertising spend allocated to radio has seen an overall increase during the period, rising from 4% in 2011 to 7% in 2019 and 2020.

Table 9 Share of traditional media advertising spend, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TV	48.1	48.3	47.7	52.1	53.4	56.0	49.5	51.6	41.8	37.6
Outdoor	36.6	36.4	38.1	33.1	31.6	31.7	34.5	35.7	45.5	49.5
Press	11.7	11.6	11.1	12.5	11.1	8.9	8.6	7.0	5.7	5.9
Radio	3.6	3.7	3.2	2.4	3.9	3.4	7.4	5.7	6.9	6.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Nielsen Media Research
Notes:
See notes to Table 8.
Percentages may not sum to 100 due to rounding.

EXHIBITION

FACTS IN FOCUS

The exhibition sector faced major challenges during 2020 as a result of the COVID-19 pandemic, with cinemas either closed or operating at reduced capacity for much of the year.

- In 2020, the UK had 4,682 screens in 985 cinemas.
- Multiplexes accounted for 40% of cinema sites and 79% of screens.
- There were seven screens for every 100,000 people in the UK, lower than countries such as the USA (12.4), France (9.3), Australia (8.8) and Spain (7.7).
- In 2020, the three largest exhibitors owned 31% of all UK cinemas and 60% of UK screens.
- The average ticket price at commercial cinemas in 2020 was £6.98, down from £7.12 in 2019.
- Event cinema generated £11 million from 60 releases at the UK and Republic of Ireland box office in 2020, down from a record high of £52 million in 2019.

Exhibition

Background to the UK exhibition sector in 2020

In an effort to reduce the transmission risk of COVID-19, the UK Government required all cinemas to close at the end of Q1 2020. Restrictions were eased at the beginning of Q3, which enabled cinemas to reopen if they had additional safety measures in place (including operating at reduced capacity); however, further national and regional restrictions were implemented during periods in late Q3 and Q4 which required many cinemas to close again.

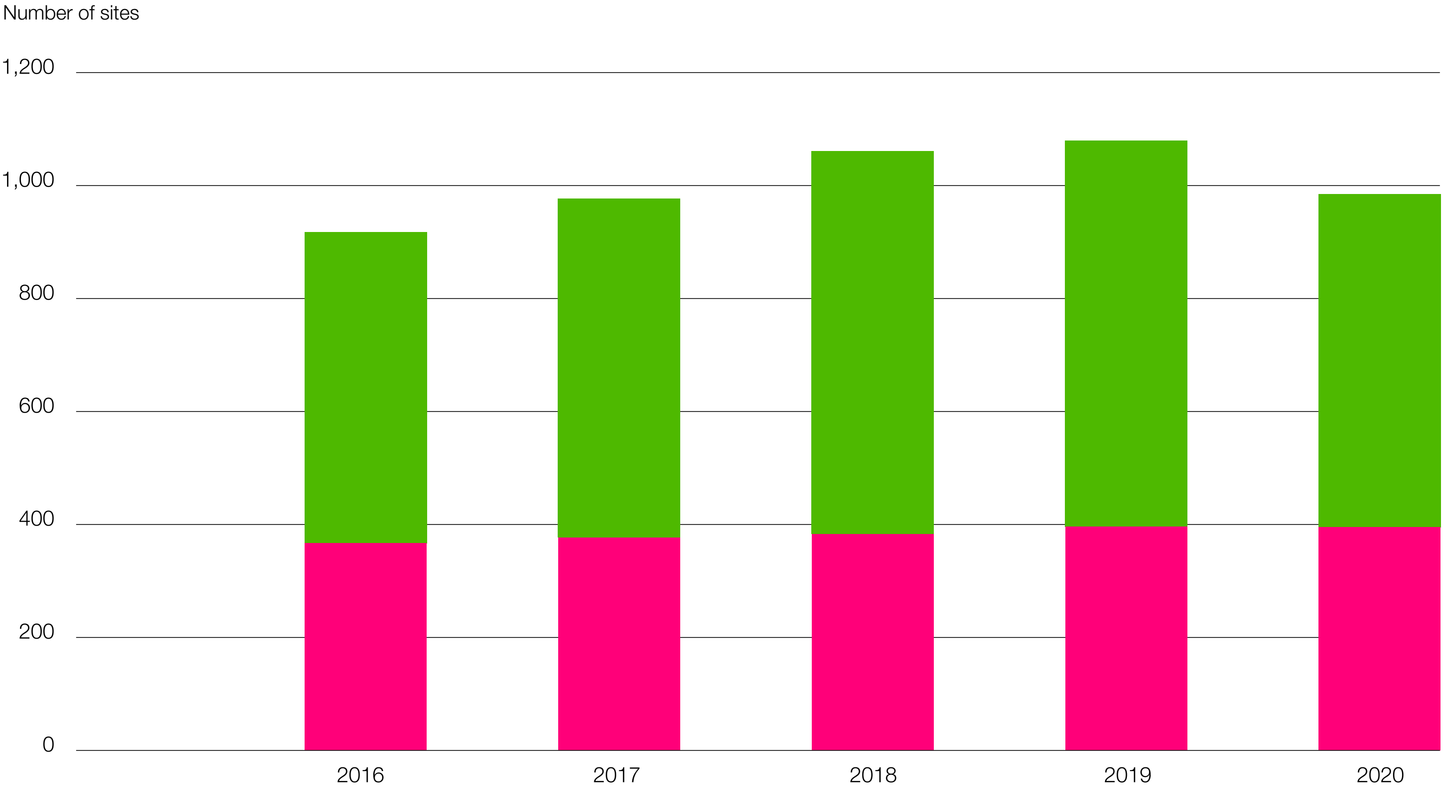
To help support non-profit and independent cinemas at risk of permanent closure, the Culture Recovery Fund for Independent Cinemas in England was launched in August as part of the UK Government's £1.57 billion support package for cultural and heritage organisations hit hard by the pandemic. Administered by the BFI on behalf of the Department for Digital, Culture, Media & Sport (DCMS), in 2020 the fund awarded a first raft of over £16 million to more than 200 cinemas in the form of 'Safety Grants' to enable cinemas to put coronavirus health and safety measures in place, and 'Business Sustainability Grants' to support cinemas to reach a break-even point during their first months of re-opening. The devolved administrations were allocated a total of £189 million from central Government towards cultural and heritage support. Funding for cinemas was made available through the Scottish Government's Independent Cinema Recovery and Resilience Fund, the Welsh Assembly Government's own Cultural Recovery Fund, and the Northern Ireland Executive's Stability & Renewal Programme for Organisations.

UK cinema sites

Figure 1 shows the number of cinema sites in the UK from 2016 to 2020. It should be noted that these data are not comparable with those published in previous Yearbooks due to a change in data suppliers and the methodology used to calculate the number of sites. Cinemas are now only included in the count if they have reported any theatrical grosses to Comscore for the given year. (It should be noted that figures for 2016-2019 have been updated on the basis of the new methodology so that the data are consistent for reviewing trends.)

According to Comscore there were year-on-year increases in the number of UK cinema sites between 2016 and 2019, with an overall rise from 918 to 1,080. There was a decrease, however, in the number of sites reporting in 2020. While there was little change in the number of multiplexes between 2019 and 2020 (a decrease from 396 to 395), there was a substantial fall (-14%) in the number of traditional and mixed-use sites, which decreased from 684 to 590. This fall is partly explained by the fact that some mixed-use sites, which screen films only part of the time, were not counted in 2020 as they reported no earnings from film screenings for the year. The share of multiplexes in the UK in 2020 was 40%, up from 37% in 2019.

Figure 1 UK cinema sites by type of site, 2016-2020



	2016	2017	2018	2019	2020
Traditional and mixed-use	551	600	678	684	590
Multiplex	367	377	383	396	395
Total sites	918	977	1,061	1,080	985
% multiplex sites	40.0	38.6	36.1	36.7	40.1

Source: Comscore, BFI

Notes:

These data are not comparable with those of previous Yearbooks which were based on different methodology. Figures are now based on the number of sites reporting any film or event cinema box office grosses to Comscore within a given year. Figures for 2016-2019 have been updated using the new methodology.

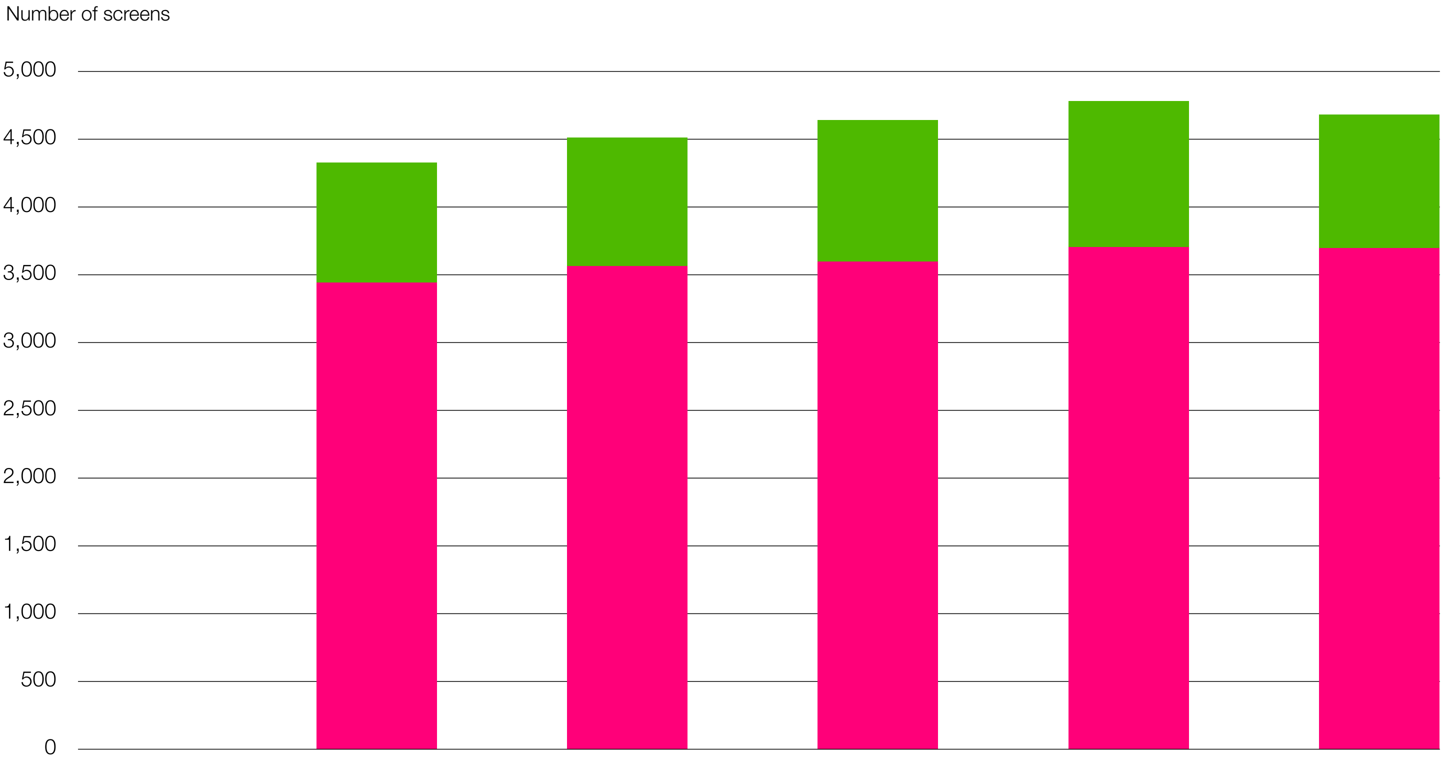
Multiplexes are defined as any cinema with five screens or more.

Traditional sites are defined as any cinema with four screens or fewer; mixed-use venues are sites that only screen films on an occasional or part-time basis.

UK cinema screens

Figure 2 shows the overall number of cinema screens in the UK between 2016 and 2020. As with cinema sites, the number of screens increased each year between 2016 and 2019 before falling (from 4,782 to 4,682) in 2020. The number of multiplex screens decreased by just under 1% between 2019 and 2020 (from 3,703 to 3,697), while traditional/mixed-use screens decreased by 9% (from 1,079 to 985). The share of multiplex screens in the UK in 2020 was 79%, up from 77% in 2019.

Figure 2 UK cinema screens by type of cinema, 2016-2020



	2016	2017	2018	2019	2020
Traditional and mixed-use	885	948	1,043	1,079	985
Multiplex	3,442	3,564	3,597	3,703	3,697
Total sites	4,327	4,512	4,640	4,782	4,682
% multiplex sites	79.5	79.0	77.5	77.4	79.0

Source: BFI, Comscore
See notes to Figure 1.

Screen density and admissions per head of population – international comparisons

A standard way to gauge the level of cinema provision is by 'screen density', i.e. the number of screens per unit of population. In 2020, screen density in the UK was 7.0 screens per 100,000 people. Data provided by Omdia show that this level of access to screens falls short of the numbers in some other major film territories: USA (12.4), France (9.4), Australia (8.8) and Spain (7.7). Italy and Germany's screen density, at 6.7 and 5.4 screens per 100,000 people respectively, was lower than the UK's.

For the fifth consecutive year, China was the world's fastest expanding territory, gaining more than 5,500 additional cinema screens, which increased its number of screens per 100,000 people from 4.9 in 2019 to 5.3.

Table 1 shows the level of admissions per head of population in a number of major film territories. Cinema attendances in 2020 fell substantially compared with 2019 for all listed territories: the fall-off in admissions per capita ranged from 67% in Australia to 81% in the USA. The UK had a similar level of admissions per head of population to Spain (0.6), despite having a lower screen density, but saw more admissions per capita than Italy and Germany. Of the selected territories, Australia (1.1) had the highest admissions per head of population.

Table 1 Admissions per head of population in selected major film territories, 2011-2020 (ranked by 2020 admissions)

Country	Australia	France	USA	UK	Spain	Italy	Germany
2011	3.8	3.4	3.8	**2.7**	2.1	1.7	1.6
2012	3.8	3.2	3.9	**2.7**	2.0	1.5	1.7
2013	3.5	3.0	3.8	**2.5**	1.7	1.6	1.6
2014	3.3	3.2	3.6	**2.4**	1.9	1.5	1.5
2015	3.8	3.1	3.8	**2.6**	2.0	1.6	1.7
2016	3.8	3.2	3.8	**2.5**	2.2	1.7	1.5
2017	3.5	3.2	3.5	**2.6**	2.1	1.5	1.5
2018	3.6	3.0	3.7	**2.6**	2.1	1.4	1.3
2019	3.4	3.2	3.5	**2.6**	2.2	1.6	1.4
2020	1.1	1.0	0.7	**0.6**	0.6	0.5	0.5

Source: Omdia
Note: Data updated since publication of the 2020 Statistical Yearbook.

Screen density and admissions per head of population in the UK

Tables 2 and 3 present screen provision data for the UK based on two types of national/regional classification. The datasets are not directly comparable because of differences in the way the regions are defined; they do, however, shed light on different aspects of national and regional variation in screen provision.

Table 2 shows screen and admissions data for the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). The table shows that although London had the greatest numbers of screens and sites its screen density, at 7.3 screens per 100,000 people, was lower than that of Northern Ireland (12.4), Northern Scotland (7.7) and the South West (7.7). The Midlands had the lowest screen density (6.0) of all the ISBA regions followed by the North East (6.2) and Yorkshire (6.3).

The average cost of a cinema ticket in the UK in 2020 was £6.98, down from £7.12 in 2019. Although this was the third consecutive year to see a decrease in the average ticket price, the fall in 2020 can partly be explained by the reduced-price tickets offered by many venues in the second half of the year in a bid to encourage audiences to return to cinemas when they reopened.

Table 2 Screens and admissions by ISBA TV region, 2020 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (million)	Admissions (million)	Admissions per screen	Admissions per head of population	Average ticket price (£)
Northern Ireland	12.4	236	5.0	32	1.9	1.4	5,853	0.7	5.45
Northern Scotland	7.7	101	2.2	31	1.3	0.8	8,030	0.6	6.44
South West	7.7	139	3.0	52	1.8	1.1	8,262	0.6	5.87
Central Scotland	7.3	283	6.0	53	3.9	2.8	9,866	0.7	6.55
Wales	7.3	229	4.9	63	3.1	1.7	7,448	0.5	5.56
London	7.3	995	21.3	190	13.7	10.2	10,283	0.7	8.43
Border	7.1	44	0.9	20	0.6	0.3	6,809	0.5	6.34
West	7.0	172	3.7	43	2.5	1.6	9,348	0.7	6.61
North West	6.9	498	10.6	78	7.2	4.6	9,218	0.6	6.31
East of England	6.7	338	7.2	75	5.0	3.6	10,574	0.7	7.02
South and South East	6.7	513	11.0	128	7.7	5.3	10,403	0.7	7.08
Yorkshire	6.3	411	8.8	76	6.5	3.8	9,259	0.6	6.41
North East	6.2	173	3.7	37	2.8	1.7	9,843	0.6	6.03
Midlands	6.0	550	11.7	107	9.1	5.0	9,081	0.5	6.94
Total	**7.0**	**4,682**	**100.0**	**985**	**67.1**	**44.0**	**9,394**	**0.7**	**6.98**

Source: BFI, Comscore, Cinema Advertising Association (CAA), Office for National Statistics (ONS)
Notes:
See notes to Figure 1.
Figures may not sum to totals due to rounding.
Average ticket price is calculated by dividing the region's box office gross for the year by its admissions.

Table 3 provides screen information for each of the English regions, as defined by the UK Government, plus Scotland, Wales and Northern Ireland. Northern Ireland had the greatest number of screens per 100,000 people in 2020 (12.5), followed by London (7.8) and Scotland and the South West (7.3). The East Midlands had the fewest screens per 100,000 people at 5.5, followed by the North East (5.9) and East of England (6.2).

Table 3 Screens and population in the nations and regions, 2020 (ranked by screens per 100,000 people)

Nation/region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (million)	Average number of screens per site
Northern Ireland	12.5	236	5.0	32	1.9	7.4
London	7.8	705	15.1	127	9.0	5.6
Scotland	7.3	398	8.5	94	5.5	4.2
South West	7.3	412	8.8	117	5.7	3.5
Wales	7.2	229	4.9	63	3.2	3.6
North West	7.1	520	11.1	80	7.4	6.5
South East	6.6	609	13.0	149	9.2	4.1
Yorkshire and The Humber	6.6	363	7.8	67	5.5	5.4
West Midlands	6.3	373	8.0	73	6.0	5.1
East of England	6.2	389	8.3	89	6.3	4.4
North East	5.9	159	3.4	30	2.7	5.3
East Midlands	5.5	266	5.7	53	4.9	5.0
England sub-total	**6.7**	**3,796**	**81.1**	**785**	**56.6**	**4.8**
Other	n/a	23	0.5	11	n/a	2.1
Total	**7.0**	**4,682**	**100.0**	**985**	**67.1**	**4.8**

Source: BFI, Comscore, Office for National Statistics (ONS)
Notes:
See notes for Figure 1
n/a = not available.
Figures/percentages may not sum to totals/sub-totals due to rounding.
'Other' includes the Channel Islands and Isle of Man.

Type of cinema screens by nation and region

Table 4 provides a snapshot of variations in multiplex provision around the UK. London had the greatest number of multiplex screens (568) in 2020, followed by the South East (462) and the North West (447). Northern Ireland had the highest proportion of multiplex screens (94%) followed by the North West (86%) and Yorkshire and The Humber and the North East (both at 83%). In England the lowest concentration of multiplex screens was found in the South West (64%), which also had the greatest number of traditional and mixed-use screens (148). Across the nations, after Northern Ireland, Wales and England had the highest proportion of multiplex screens (both at 79%), followed by Scotland (73%).

Table 4 Cinema screens by type by nation or region, 2020 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed-use	Total
Northern Ireland	222	94.1	14	236
North West	447	86.0	73	520
Yorkshire and The Humber	302	83.2	61	363
North East	132	83.0	27	159
West Midlands	306	82.0	67	373
East Midlands	217	81.6	49	266
London	568	80.6	137	705
Wales	181	79.0	48	229
South East	462	75.9	147	609
East of England	295	75.8	94	389
Scotland	291	73.1	107	398
South West	264	64.1	148	412
England sub-total	**2,993**	**78.8**	**803**	**3,796**
Other	10	43.5	13	23
Total	**3,697**	**79.0**	**985**	**4,682**

Source: BFI, Comscore
See notes to Figure 1.

Exhibitors

In 2020, the three largest exhibitors owned 31% of cinemas and 60% of screens in the UK (Table 5). Cineworld had the highest share of total UK screens (23%) and its network of Picturehouse cinemas accounted for an additional 2%. Odeon operated the greatest number of sites (114) and had 19% of screens, while Vue had 88 sites and 18% of screens. In Northern Ireland, the Omniplex chain (which operates across the island of Ireland) had a dominant position, operating 47% of cinemas and 50% of screens in 2020, something that is unmatched in any of the other nations of the UK.

Table 5 Cinema screens by exhibitors with 20 or more screens, ranked by number of screens, 2020

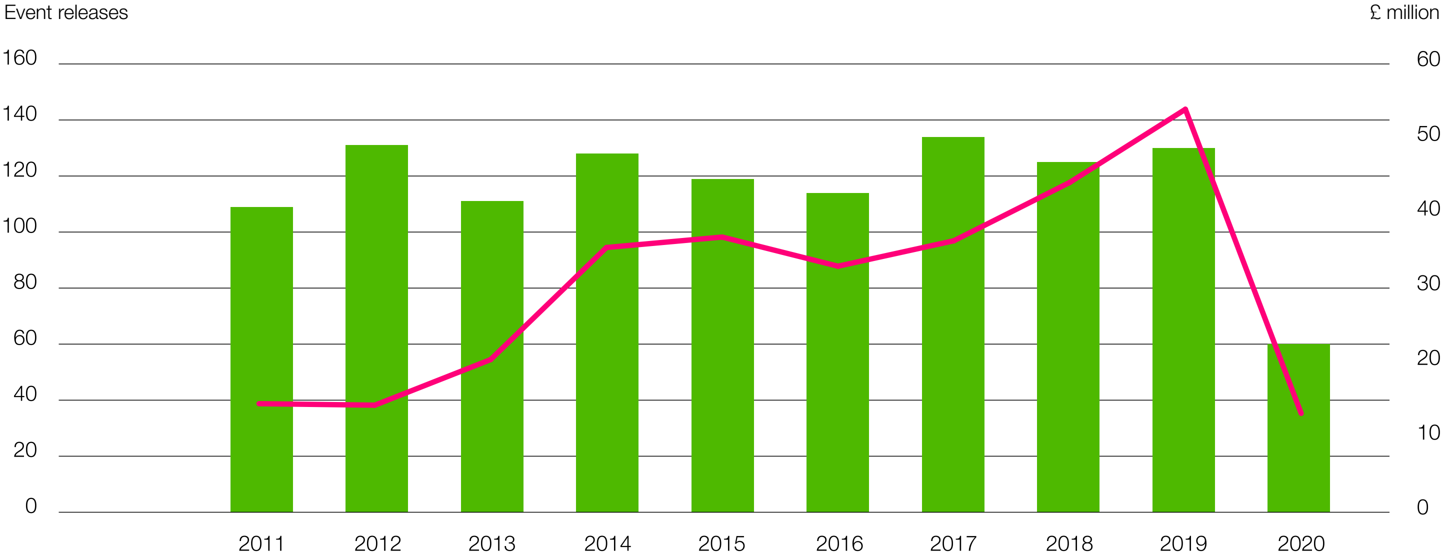
Exhibitor	Sites	Screens	% of total screens
Cineworld	101	1,071	22.9
Odeon	114	898	19.2
Vue	88	844	18.0
Showcase Cinemas	21	279	6.0
Empire Cinemas	15	135	2.9
Omniplex	15	117	2.5
Everyman	35	114	2.4
Picturehouse (Cineworld)	26	93	2.0
Light Cinemas	10	76	1.6
Reel Cinemas	15	68	1.5
Movie House Cinemas	5	46	1.0
Curzon Cinemas	15	43	0.9
Merlin Cinemas	16	40	0.9
Irish Multiplex Cinemas	5	34	0.7
Savoy Cinemas	5	25	0.5
Parkway Entertainment	4	20	0.4
Other (includes other independent chains and individual cinemas/multi-use venues)	495	779	16.6
Total	**985**	**4,682**	**100.0**

Source: Comscore, BFI RSU
Notes:
Data for 2020 are not directly comparable with those in previous Yearbooks, as these are based on information from sites that actively reported revenue to Comscore during the year.
See notes to Figure 1.
Percentages may not sum to 100 due to rounding.

Event cinema

Figure 3 shows the volume and value of event cinema releases between 2011 and 2020. Event cinema, or alternative content, can include special screenings of documentaries, films or TV content, but screenings of musical or theatrical performances are the most common types of release. As such, event cinema was doubly hit by the effects of the pandemic in 2020: not only were cinemas closed or operating under reduced capacity limits for most of the year, live performances themselves were similarly curtailed. (The planned event organised by London-based Secret Cinema, whose immersive screenings had dominated the box office charts for event cinema releases in recent years, was postponed until 2021, and subsequently to 2022.) There was a significant contraction in the event cinema market in 2020, following an overall upward trend from 2010 to 2019: the number of new events released was down 54% compared with 2019 while box office receipts were down 78%.

Figure 3 Total number of event cinema releases and box office earnings, UK and Republic of Ireland, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of event releases	109	131	111	128	119	114	134	125	130	60
Box office (£ million)	12.7	12.5	18.6	33.6	35.0	31.1	34.5	42.3	52.1	11.4

Source: Comscore
Note: Only includes new event cinema releases.

According to Comscore, there were 60 new event cinema releases in 2020, down from 130 in 2019 (Table 6). These events generated a total box office of £11 million, down from a record £52 million in 2019. Ballet/dance and popular music concerts had the greatest number of releases in 2020 with 10 each while releases of theatre performances generated the highest earnings (£2.6 million), a 23% share of the total box office for this type of programming.

Table 6 Number and box office takings of event cinema releases in the UK and Republic of Ireland by type of event, 2020 (ranked by gross box office)

Type of event	Number of events	% of events	Gross box office (£ million)	% of gross box office
Theatre	5	8.3	2.63	23.1
Classical music concert	6	10.0	2.56	22.5
Ballet/dance	10	16.7	2.50	22.0
Opera	9	15.0	1.52	13.3
Popular music concert	10	16.7	0.81	7.1
Documentary	9	15.0	0.61	5.4
Anime	2	3.3	0.47	4.1
Children's TV special	5	8.3	0.16	1.4
Exhibition	3	5.0	0.12	1.0
Comedy	1	1.7	0.01	<0.1
Total	**60**	**100.0**	**11.40**	**100.0**

Source: Comscore, BFI RSU
Notes:
Percentages/figures may not sum to totals due to rounding.
Only includes new event cinema releases.

Top 10 event cinema releases 2020

Eight of the top 10 event cinema releases in 2020 were shown before the initial cinema restrictions came into force in March of that year, the majority of which were live event releases. The two remaining releases (*David Attenborough: A Life on Our Planet* and *Break the Silence: The Movie*) were produced with footage captured before the pandemic. *Andre Rieu: 70 Years Young*, released at the beginning of January, was 2020's highest grossing event cinema title with earnings of £2 million (Table 7), and the Dutch conductor's most successful release to date. As an indication of the impact of the pandemic on cinema attendances, whilst every Andre Rieu release from 2016 to early 2020 earned between £1.4 million and £2.0 million, his second release of 2020 (Q3) *Andre Rieu's Magical Maastricht: Together in Music* earned just £0.2 million.

Table 7 Top 10 Event cinema releases in the UK and Republic of Ireland, 2020

Rank	Title	Type	Country of origin	Distributor	Locations Opening Week	Gross box office (£ million)
1	Andre Rieu: 70 Years Young	Classical music concert	Nld	Piece of Magic	628	2.04
2	Kinky Boots - The Musical	Theatre	UK	Trafalgar	613	1.45
3	Cyrano de Bergerac - NT Live 2020	Theatre	UK	NT Live	598	0.90
4	Riverdance 25th Anniversary Show	Ballet/dance	Ire	Trafalgar	424	0.67
5	The Sleeping Beauty - ROH, London 2019/20	Ballet/dance	UK	ROH	518	0.66
6	La Boheme - ROH, London 2019/20	Opera	UK	ROH	524	0.60
7	The Cellist/Dances at a Gathering - ROH, London 2019/20	Ballet/dance	UK	ROH	496	0.51
8	Porgy and Bess - Met Opera 2020	Opera	USA	Trafalgar	214	0.50
9	David Attenborough: A Life on Our Planet	Documentary	UK	Altitude	527	0.45
10	Break the Silence: The Movie	Popular music concert	Kor	Trafalgar	354	0.40

Source: Comscore, BFI RSU

FILM ON PHYSICAL VIDEO

FACTS IN FOCUS

Despite an increase in home leisure time in 2020, the market for film on physical video continued to decline: the value of sales decreased by 33% compared with 2019 while the value of rentals decreased by 26%. In 2020, non-digital feature film video sales and rentals in the UK generated £251 million, down from £370 million in 2019.

- The value of sales for all categories of video on physical media in 2020 was £356 million; sales of feature film on video accounted for £233 million.
- There were 34 million sales of all categories of video on physical media (48 million in 2019), with feature film accounting for 26 million sales.
- Film accounted for 76% of the volume of the physical sell-through market and 66% of the value. UK films accounted for around 35% of the volume of all films sold on video and 47% of the value.
- The most popular film purchase on physical video in 2020 was *Downton Abbey*; the most popular genre was action/adventure.
- The physical video rental market in 2020 was worth £17 million.

Film on physical video

Physical video

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

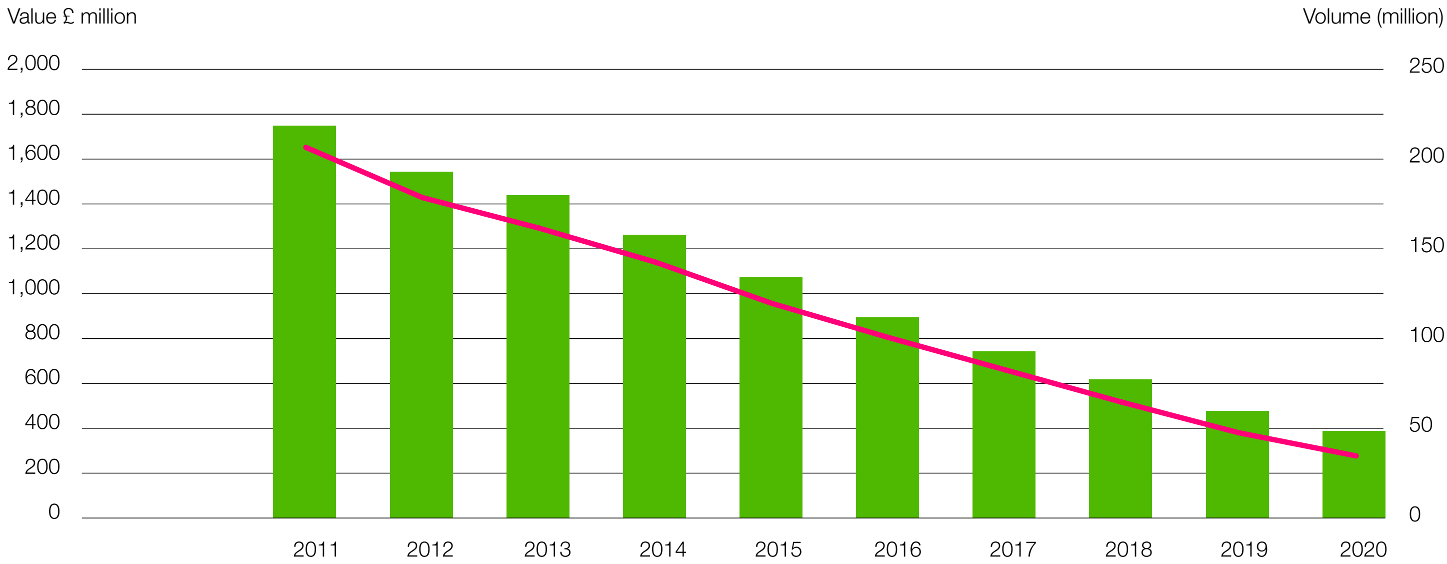
Film in the physical video retail market

As Figure 1 shows, the value and volume of physical video sales, in all categories, in the UK have declined each year between 2011 and 2020. The value of physical video sales in the UK decreased by 80% over the period, while the volume of sales decreased by 84%.

Unlike the digital video market, which saw significant growth in 2020, due in part to the pandemic-related restrictions on out-of-home activities, the retail market for physical video saw no uptick from the increased in-home leisure time available to most of the UK population in the year. In 2020, 34 million videos were sold in the UK (down 29% compared with 2019) with a total market value of £356 million (down 25% compared with 2019).

DVDs accounted for the majority of physical video sales in 2020 (80% by volume and 70% by value). While the DVD has remained the dominant format for physical video sales, its share of the market has contracted over the period. The share of the market associated with the Blu-ray format increased from 7% of all units sold and 13% of total value in 2011 to 20% of all units sold and 30% of total value in 2020. While overall sales have declined, Blu-ray has become the more resilient format: in 2020 the value of Blu-ray sales decreased by 16% compared with 2019 (down from £127 million to £107 million) while the value of DVD sales decreased by 29% (down from £350 million to £249 million).

Figure 1 Retail video sales (all categories), 2011-2020



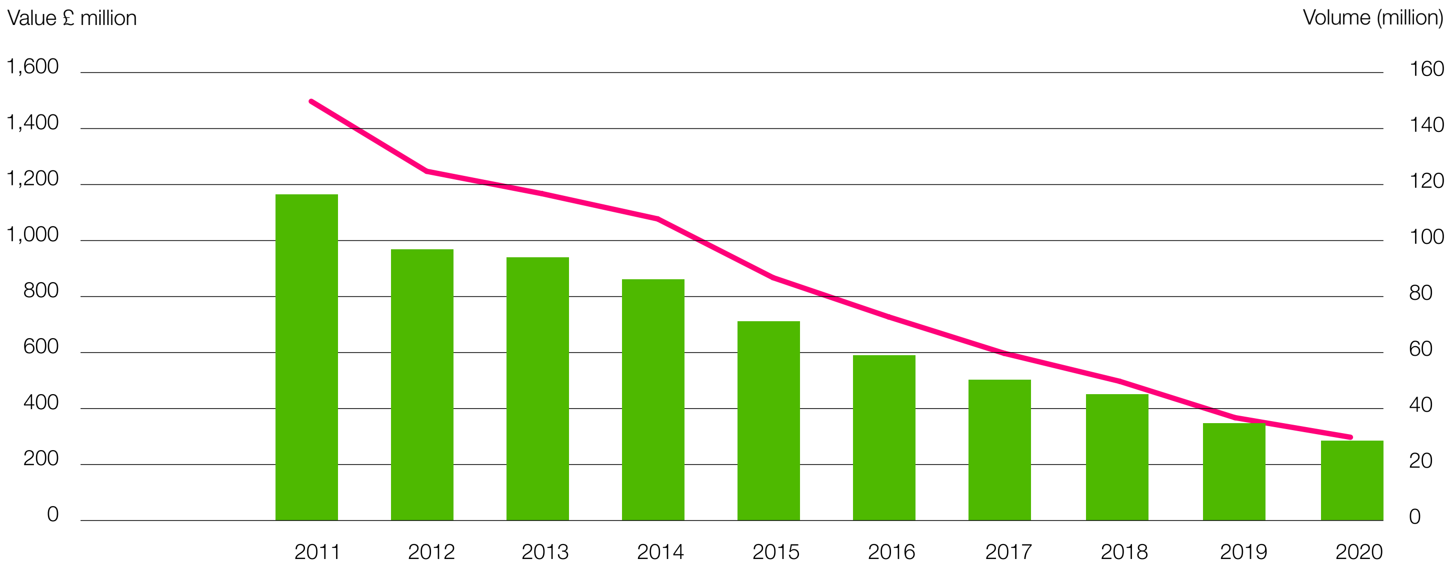
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Value (£ million)	1,749	1,543	1,439	1,263	1,075	894	743	617	477	356
Volume (million)	207	179	162	143	120	101	83	65	48	34

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

Feature film represented approximately 66% of the physical sell-through market by value (£233 million) and 76% by volume (26 million units) in 2020. We estimate that UK films accounted for around 35% of sales by value (down from 40% in 2019) and 37% of sales by volume (the same as in 2019).

As Figure 2 shows, the trend for sales of film on physical video between 2011 and 2020 has mirrored that of the overall physical sell-through market. The value of the retail market for film on physical video in the UK decreased by 80% over the period, while the volume of sales decreased by 83%. Despite the increase in home leisure time available to most film audiences during the year, the value of sales in 2020 were down 33% compared with 2019, while the number of units sold fell by 34%.

Figure 2 Film on physical video retail sales, 2011-2020

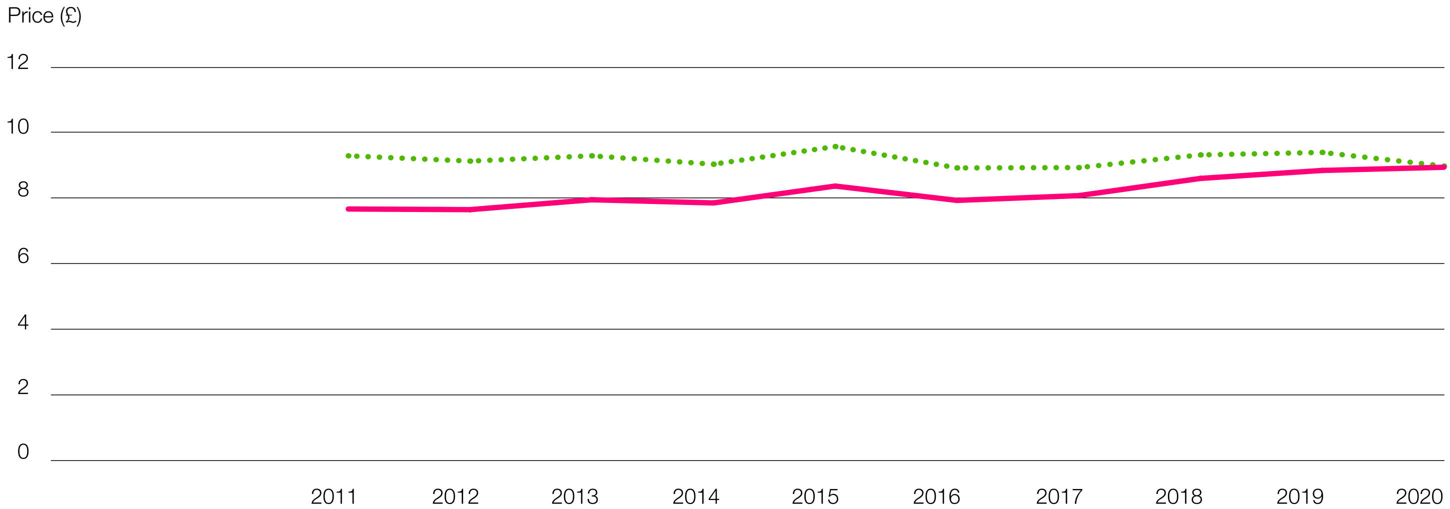


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Value (£ million)	1,165	968	940	861	712	589	503	451	347	233
Volume (million)	152	127	119	110	89	75	62	52	39	26

Source: Omdia, BFI RSU analysis of Official Charts Company data
Note: Includes some feature films which would be classified as 'children's videos' in Official Charts Company data.

Figure 3 shows the average unit price for film on physical video formats between 2011 and 2020. When adjusted for inflation, the average cost is fairly consistent, with the average unit price for most years falling between £8.90 and £9.40 when expressed in 2020 pounds.

Figure 3 Average retail price of film per unit, 2011-2020



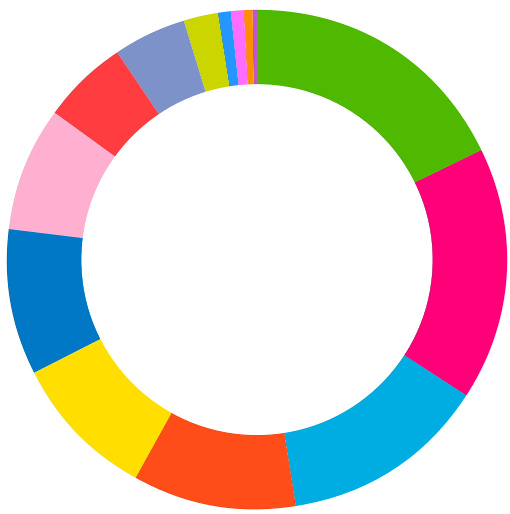
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Inflation adjusted price (£ 2020)	9.28	9.11	9.28	9.01	9.58	8.89	8.90	9.31	9.39	9.05
Price	7.64	7.62	7.93	7.83	8.36	7.91	8.06	8.60	8.85	9.05

Source: Omdia, BFI RSU analysis of Official Charts Company data, Her Majesty's Treasury
Notes:
Includes some feature films that would be classified as 'children's videos' in Official Charts Company data.
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-september-2021-quarterly-national-accounts.

Figure 4 shows that the most popular genre for films sold on physical video in 2020 was action/adventure, which accounted for 18% of the market (20% in 2019), followed by drama with 16% and children's animated films with 13%. (It should be noted that these categories, as defined by BASE, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in other chapters of this Yearbook.)

Figure 4 Sales of film on physical video formats by genre, 2020

Genre	%
Action/adventure	18.0
Drama	16.2
Children's animated	13.4
Sci-fi	10.6
Comedy	9.5
Child/Family	9.3
Horror	8.1
Thriller	5.6
War	4.7
Musical	2.3
Documentary	0.8
Western	0.7
Anime	0.7
Adult	0.1
Other	<0.1
Bollywood	<0.1



Source: Official Charts Company, BASE
Note: These shares are based on the number of physical units sold.

Image: *Downton Abbey* © 2019 Focus Features LLC. All rights reserved. Courtesy of Universal Studios Licensing LLC

Table 1 shows the top 10 best-selling films on physical video in 2020. The list is headed by *Downton Abbey*, one of eight titles released at the UK and Republic of Ireland box office in 2019, and the first UK independent film to top the chart since *Paddington* in 2015. The remainder of the list is made up of 2020 theatrical releases, including the year's top box office earner, *1917*.

In total, four of the top 10 titles are UK qualifying films. In addition to *Downton Abbey*, these include the US studio-backed productions *Star Wars: The Rise of Skywalker*, *1917* and *Maleficent: Mistress of Evil*.

Table 1 Top 10 best-selling films on physical video formats, 2020

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Downton Abbey	UK	2019	Universal
2	Star Wars: The Rise of Skywalker	UK/USA	2019	Walt Disney
3	Joker	USA/Can	2019	Warner Bros
4	Frozen 2	USA	2019	Walt Disney
5	1917	UK/USA	2020	Entertainment One
6	Jumanji: The Next Level	USA	2019	Sony
7	Maleficent: Mistress of Evil	UK/USA	2019	Walt Disney
8	Terminator: Dark Fate	USA/Can/Aus	2019	20th Century Fox
9	Onward	USA	2020	Walt Disney
10	Knives Out	USA	2019	Lionsgate

Source: Official Charts Company, BFI RSU
Note: This ranking is based on the number of physical units sold. It may differ from other publicly available lists which may incorporate digital downloads or be based on revenue.

The top 10 best-selling UK qualifying films on physical video in 2020 include four titles which also appear in the overall top 10 list, including the year's most popular film on physical video, *Downton Abbey* (Table 2). Six of the top 10 UK qualifying titles were released theatrically in the UK and Republic of Ireland in 2019, while the remainder were released in 2020. Three of the titles (*Downton Abbey, The Gentlemen* and *Judy*) are UK independent films.

Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2020

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Downton Abbey	UK	2019	Universal
2	Star Wars: The Rise of Skywalker	UK/USA	2019	Walt Disney
3	1917	UK/USA	2020	Entertainment One
4	Maleficent: Mistress of Evil	UK/USA	2019	Walt Disney
5	The Gentlemen	UK/USA	2020	Entertainment in Video
6	Dolittle	UK/USA	2020	Universal
7	The Lion King	UK/USA	2019	Walt Disney
8	Tenet	UK/USA	2020	Warner Bros
9	Last Christmas	UK/USA	2019	Universal
10	Judy	UK	2019	Pathé

Source: Official Charts Company, BFI RSU
See note to Table 1

Three of the top 10 best-selling UK independent films on physical video in 2020 also appear in the top 10 list of UK qualifying films (Table 3). Headed by the year's overall top-selling title, *Downton Abbey*, the list features six films released theatrically in the UK and Republic of Ireland in 2019 and four titles released in 2020. The top two films, *Downton Abbey* and *The Gentlemen* were respectively the highest grossing UK independent film releases of 2019 and 2020.

Two of the titles, *Angel Has Fallen* and *Fisherman's Friends*, feature in this list for a second consecutive year.

Table 3 Top 10 best-selling UK independent films on physical video formats, 2020

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Downton Abbey	UK	2019	Universal
2	The Gentlemen	UK/USA#	2020	Entertainment in Video
3	Judy	UK	2019	Pathé
4	Angel Has Fallen	UK/USA#	2019	Lionsgate
5	Yesterday	UK	2019	Universal
6	A Shaun the Sheep Movie: Farmageddon	UK	2019	StudioCanal
7	Military Wives	UK	2020	Lionsgate
8	Fisherman's Friends	UK	2019	Entertainment in Video
9	Emma	UK	2020	Universal
10	The Personal History of David Copperfield	UK/USA#	2020	Lionsgate

Source: Official Charts Company, BFI RSU
See note to Table 1.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

The most popular documentary feature on physical video in 2020 was the biographical film *Finding Jack Charlton* (Table 4). The portrait of the footballer-turned-manager is one of four sports documentaries in the 2020 top 10 list, alongside *The Three Kings*, a film about three of Scotland's greatest football managers, *Diego Maradona*, a biography of the celebrated Argentinian footballer, and *Free Solo*, the Oscar® winning film chronicling the first-ever ropeless ascent of the el Capitan peak in Yosemite National Park by American climber Alex Honnold. The list also includes four war-related documentaries, headed by the 2018 and 2019 top earning documentary film on physical video, *They Shall Not Grow Old*, Peter Jackson's homage to the troops of the First World War.

In addition to *They Shall Not Grow Old*, three other top 10 titles have appeared in this list in previous years: *Apollo 11, Diego Maradona* and *Free Solo* all featured in the top 10 of best-selling documentary films on physical video in 2019.

Table 4 Top 10 best-selling documentary films on physical video formats, 2020

Rank	Title	Country of origin	Year of theatrical release*	Distributor
1	Finding Jack Charlton	UK/Ire	2020	Noah/Spirit Entertainment
2	Apollo 11	USA	2019	Dogwoof
3	They Shall Not Grow Old	UK	2018	Warner Bros
4	Made in Auschwitz	Deu/Isr	2020#	Signature Entertainment
5	The Three Kings	UK	2020	Spirit Entertainment
6	Diego Maradona	UK	2019	Altitude/Spirit Entertainment
7	Battle of Britain: Empty Skies	UK	2020#	Reel2Reel
8	Free Solo	USA	2018	Dogwoof
9	Audrey	UK	2020#	Universal
10	VE Day: Forever in Their Debt	UK	2020#	Reel2Reel

Source: Official Charts Company, BFI RSU

See note to Table 1.

* Year of theatrical release here indicates when a title was first released theatrically in the UK.

Title released straight to video.

The best-selling foreign language film on physical video in 2020 was South Korean director Bong Joon-ho's black comedy *Parasite*. The multi-Oscar® and BAFTA winning title was the highest grossing foreign language film at the UK and Republic of Ireland box office in 2020 and currently ranks as the territory's all-time top earning foreign language film release. It is one of seven titles in the 2020 physical video top 10 from Asian countries. For the first time since the 2013 top 10, the list features no titles from the Japanese animation house Studio Ghibli.

Table 5 Top 10 best-selling foreign language films on physical video formats, 2020

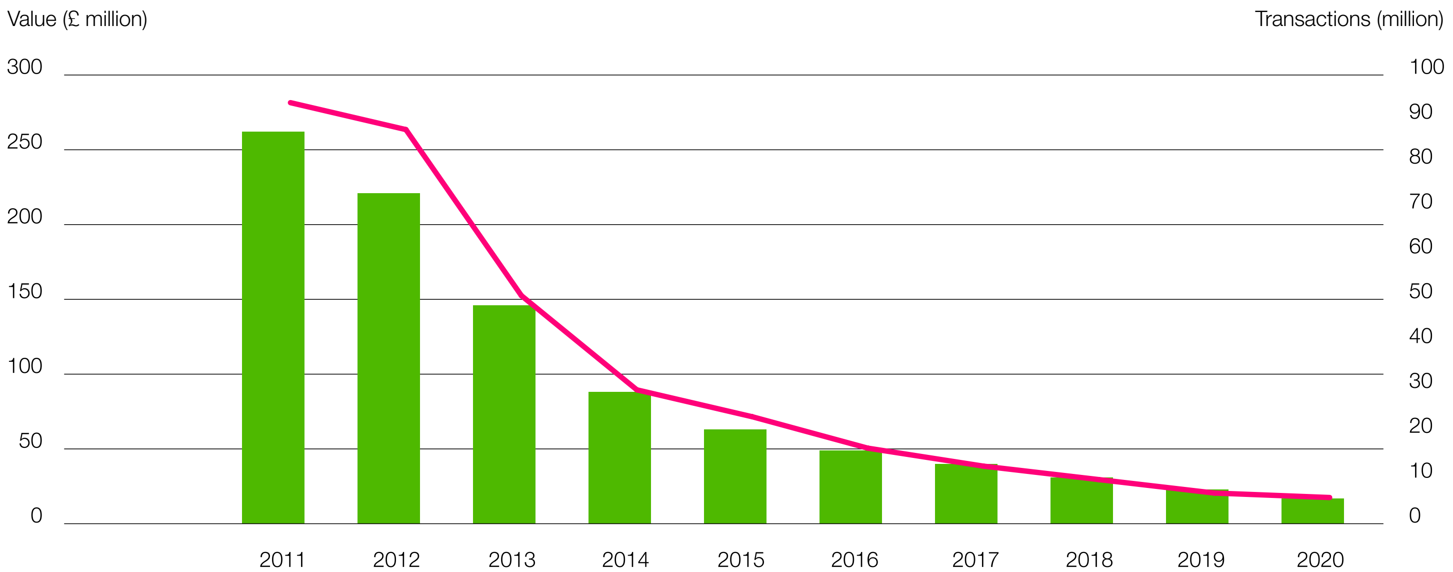
Rank	Title	Country of origin	Year of theatrical release*	Distributor
1	Parasite	Kor	2020	Curzon Artificial Eye
2	Weathering with You	Jpn	2020	Anime Limited
3	Mulan: Legendary Warrior	Chn	2010#	Cine Asia
4	Train to Busan Presents: Peninsula	Kor	2020	StudioCanal
5	The Hunt for Vlad the Impaler	Tur	2020#	4Digital Media
6	Train to Busan	Kor	2016	StudioCanal
7	Skyfire	Chn	2020#	Patriot Films
8	Portrait of a Lady on Fire	Fra	2020	Curzon Artificial Eye
9	Akira	Jpn	1991	Manga Entertainment
10	The Wolf's Call	Fra	2019	Altitude/Spirit Entertainment

Source: Official Charts Company, BFI RSU
Notes:
Films are labelled as 'foreign language' if their original language was not English, regardless of whether the option to view the film dubbed in English is available on the physical video release.
See note to Table 1.
* Year of theatrical release here indicates when a title was first released theatrically in the UK.
# Title released straight to video.

Film in the physical video rental market

As Figure 5 shows, revenues from rentals in 2020 (£17 million) represent less than 7% of the market's value in 2011 (£262 million), while the volume of transactions in 2020 (five million) represents a drop in sales of 95% compared with 2011 (93 million).

Figure 5 Film on physical video rentals, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Value (£ million)	262	221	146	88	63	49	40	31	23	17
Transactions (million))	93	87	50	29	23	16	12	9	6	5

Source: Omdia

FILM ON DIGITAL VIDEO

FACTS IN FOCUS

With cinemas and other public venues closed for much of 2020 as a result of the COVID-19 pandemic, people sought out more entertainment options at home. The use of on-demand platforms surged during the year, with the value of the digital video market for film increasing by 40% compared with 2019.

- In 2020, the overall digital video market for film in the UK was estimated to be worth £1.35 billion, an increase from £966 million in 2019.
- Revenues from subscription video on demand (SVoD) services were estimated to have been £1 billion, an increase of 47.5% compared with 2019.
- Revenues from rental and retail (TVoD) services were estimated to have been £333 million, an increase of 21% compared with 2019.
- Premium Video on Demand (PVoD) transactions accounted for 13% of TVoD revenues.
- Netflix was the most popular subscription video platform in the UK in 2020 with 14.8 million households accessing the service.
- The Disney+ platform launched in March and by Q3 had become the third most popular subscription video service in the UK with 3.4 million households accessing the service.
- By Q3, 17 million UK households had access to one or more SVoD service (60% of total households).
- Netflix exclusive *Enola Holmes* was the most watched film on a subscription video service in 2020.
- In 2020, over half (53%) of the films available on the leading subscription streaming services (Netflix, Amazon Prime Video and Disney+) were American titles, and 62% of available films had been released between 2010 and 2020.

Film on digital video

Digital video

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

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

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

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

- Free/advert-supported – providers include YouTube (excluding YouTube Premium), Facebook Watch and catch-up services from the major broadcasters (also known as BVoD) such as BBC iPlayer, ITV Hub (excluding ITV Hub+) and All 4 (excluding All 4+).

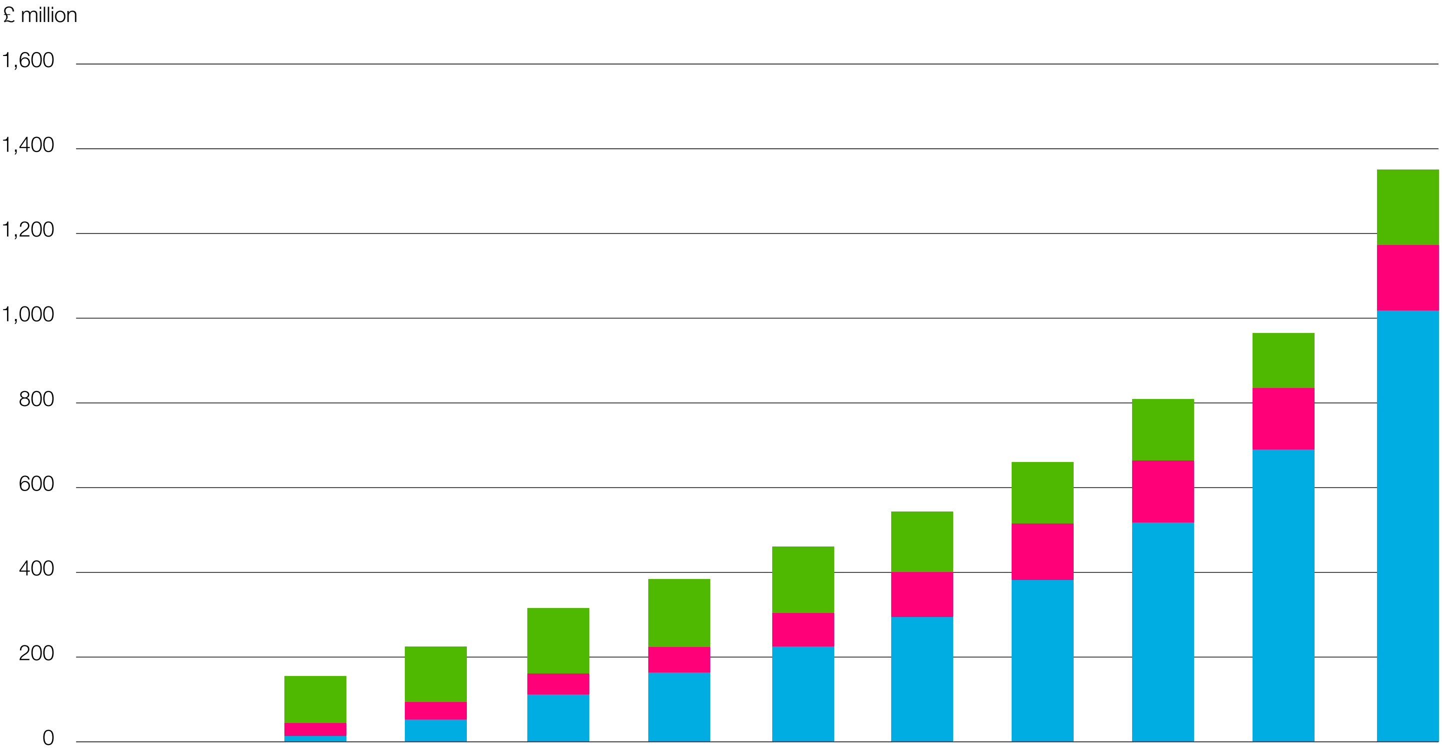
Film in the digital video market

According to Omdia, the estimated value of the digital video market for film in the UK in 2020 was £1.35 billion, an increase of 40% compared with 2019, and almost 10 times its value in 2011 (Figure 1). Between 2014 and 2019 the average annual increase was 20% so the growth in 2020 has doubled the recent trend. The closure of public and hospitality venues during periods of 2020 due to the COVID-19 pandemic affected how people could spend their leisure time, and consequently there was an increase in people watching films at home, with this being reflected in the growth of the VoD market, and in particular an uptick in SVoD subscriptions.

In 2020, the estimated value of the SVoD market grew to £1 billion (47.5% up on 2019). This expansion was partly fuelled by the introduction of the Disney+ platform in March 2020. The arrival of Disney+ marks the first time in the UK that a major studio has launched a dedicated SVoD platform, the service arriving with brand recognition and a library of well-known films (and TV series). During 2020, Disney+ became the third most popular streaming service after Netflix and Amazon Prime Video.

The TVoD market's estimated revenues of £333 million are also a record high. In 2020, several major studios began offering higher-priced Premium Video on Demand (PVoD) rentals for some titles either in lieu of a planned cinema release or for titles that had curtailed cinema releases. These PVoD revenues are included in the TVoD rental figure and account for 13% of the value, and just under 50% of the year-on-year growth.

Figure 1 Estimated value of the digital video film market in the UK, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TVoD rental	111	130	155	160	158	142	145	145	130	179
TVoD retail	31	41	50	61	78	106	133	146	145	154
SVoD	13	53	111	163	225	295	382	518	690	1,018
Total	155	225	316	384	461	543	660	809	966	1,351

Source: Omdia
Notes:
Estimates include both television-based and online digital video revenues.
Figures updated since publication of the 2020 Statistical Yearbook.
Notes: Figures may not sum to totals due to rounding

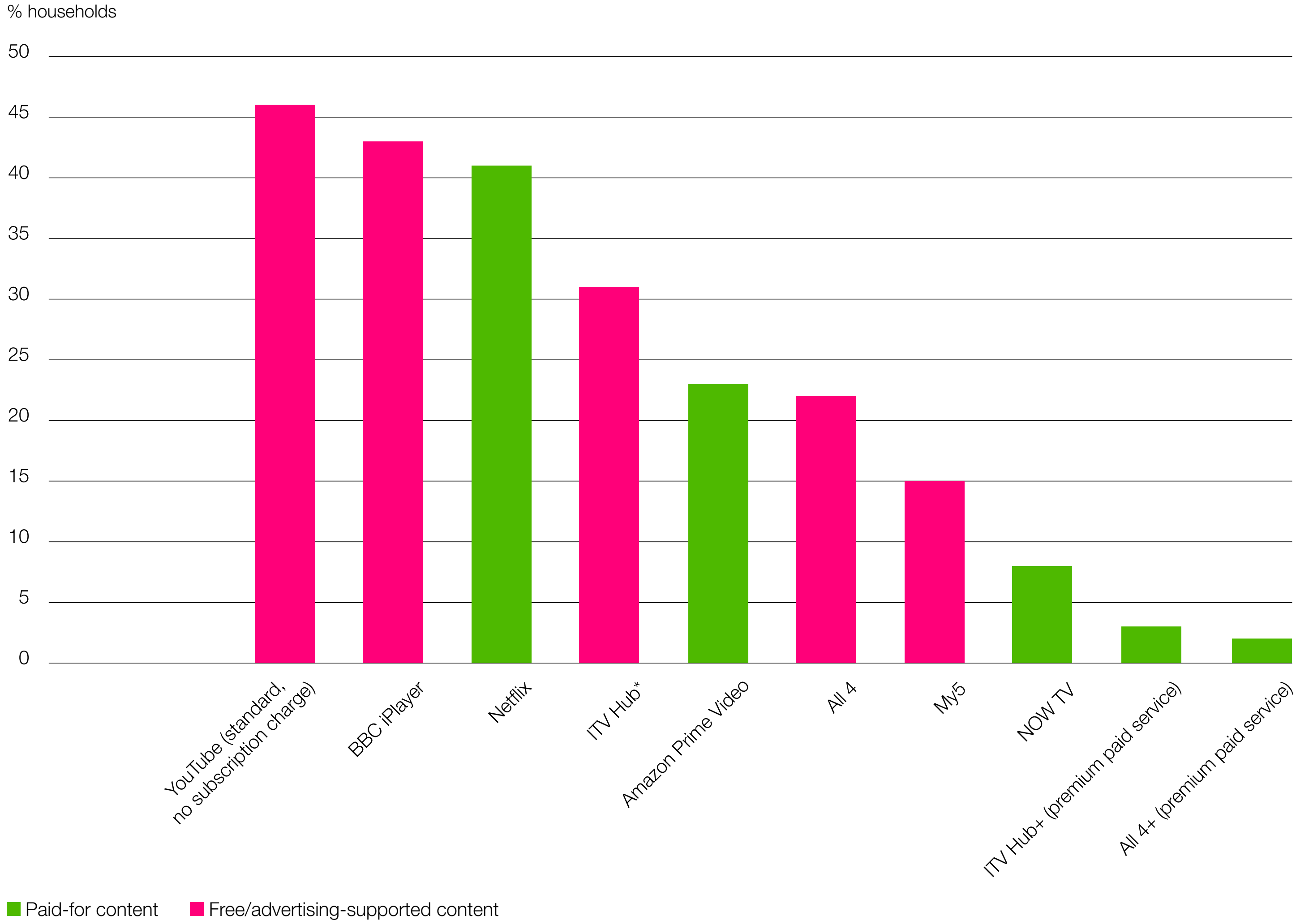
Popularity of on-demand streaming services

UK viewers are amongst the highest consumers of on-demand content in the world, thanks to the popularity of both international SVoD platforms and catch-up services from domestic broadcasters. Data from Ampere Analysis shows that as of Q1 2021, 87% of all households in the UK watch VoD at least once a month, compared with 75% in Germany and 68% in France.

Figure 2 shows the top 10 most popular on-demand streaming services (for film, television and other video content) in 2020 amongst UK households. This survey was undertaken in Q1, so does not reflect changes in viewing habits during the pandemic, or include Disney+.

The top 10 is split evenly between free/advert supported and paid-for services, and features all the UK-wide broadcaster catch-up services. YouTube was the most popular platform for watching video content, with 46% of UK households using the service. BBC iPlayer was the most popular broadcaster service, being used in 43% of households, while 41% of households used the most popular SVoD provider, Netflix.

Figure 2 Top 10 most popular on-demand services in the UK, 2020



% Households	46	43	41	31	23	22	15	8	3	2

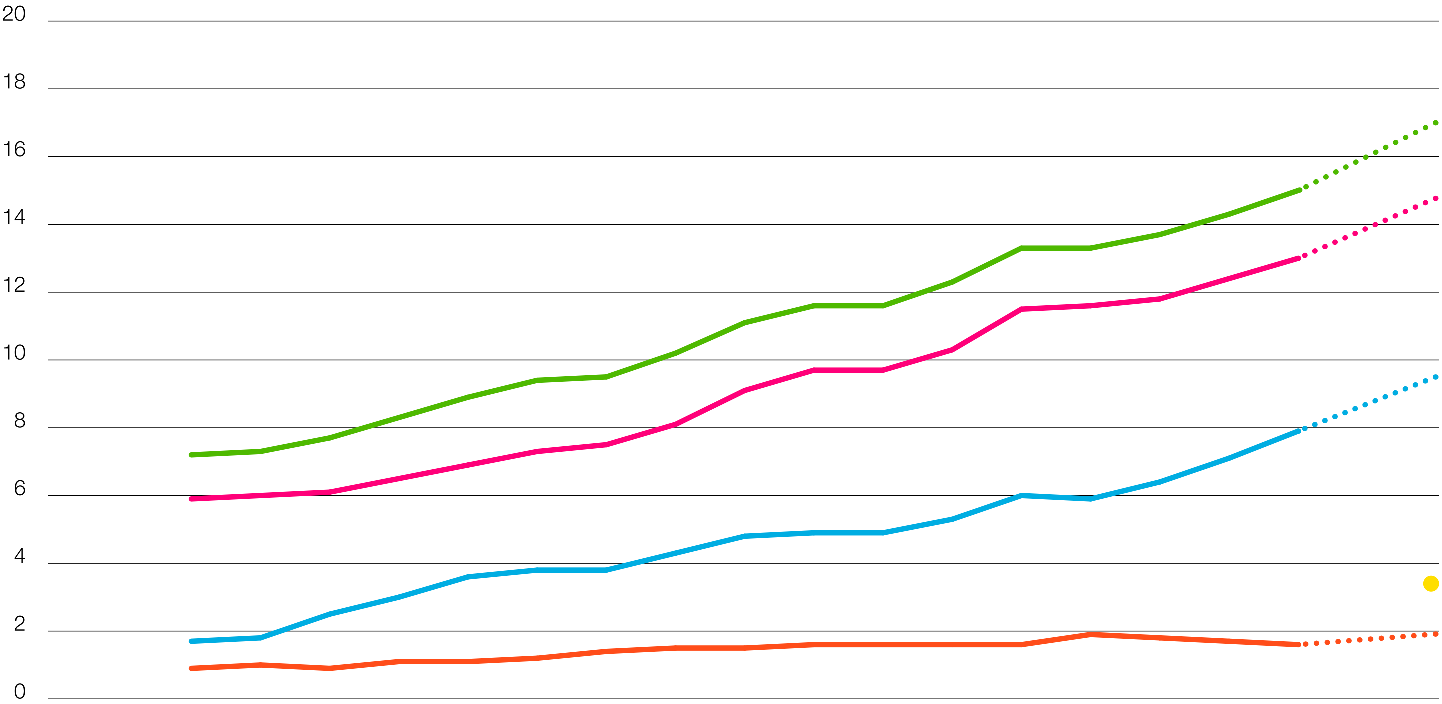
Source: Ofcom Technology Tracker 2020
Q: Which of these TV services does anyone in your household ever use to watch programmes, films or other video content? Please think about watching on any type of device. Please also think about watching while away from home, perhaps when travelling. N=3,959
Notes:
*ITV Hub figures include STV Player.
Due to a change in question, these figures are not directly comparable with the 2020 Statistical Yearbook.

The audience for SVoD

As Figure 3 shows, the number of households with access to SVoD services increased from 7.2 million in Q1 2016 to 17.0 million in Q3 2020 (60% of total households). Netflix (14.8 million households) and Amazon Prime Video (9.5 million) remain the two most popular SVoD services in the UK, with Netflix experiencing a 24% year-on-year growth and Amazon Prime Video a 48% growth. Newcomer Disney+ overtook NOW TV to become the third most popular service in 2020, with 3.4 million households subscribing to the service within just a few months of its launch. It should be noted that due to COVID-19 restrictions, in 2020 the BARB Establishment Survey was only undertaken twice: once during pre-lockdown Q1, and once during Q3. (For more on SVoD audiences, see the Audiences chapter.)

Figure 3 UK SVoD households, Q1 2016 – Q3 2020

Millions of households



	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020
Any SVoD	7.2	7.3	7.7	8.3	8.9	9.4	9.5	10.2	11.1	11.6	11.6	12.3	13.3	13.3	13.7	14.3	15.0		17.0
Netflix	5.9	6.0	6.1	6.5	6.9	7.3	7.5	8.1	9.1	9.7	9.7	10.3	11.5	11.6	11.8	12.4	13.0		14.8
Amazon Prime Video	1.7	1.8	2.5	3.0	3.6	3.8	3.8	4.3	4.8	4.9	4.9	5.3	6.0	5.9	6.4	7.1	7.9		9.5
NOW TV	0.9	1.0	0.9	1.1	1.1	1.2	1.4	1.5	1.5	1.6	1.6	1.6	1.6	1.9	1.8	1.7	1.6		1.9
Disney+																			3.4

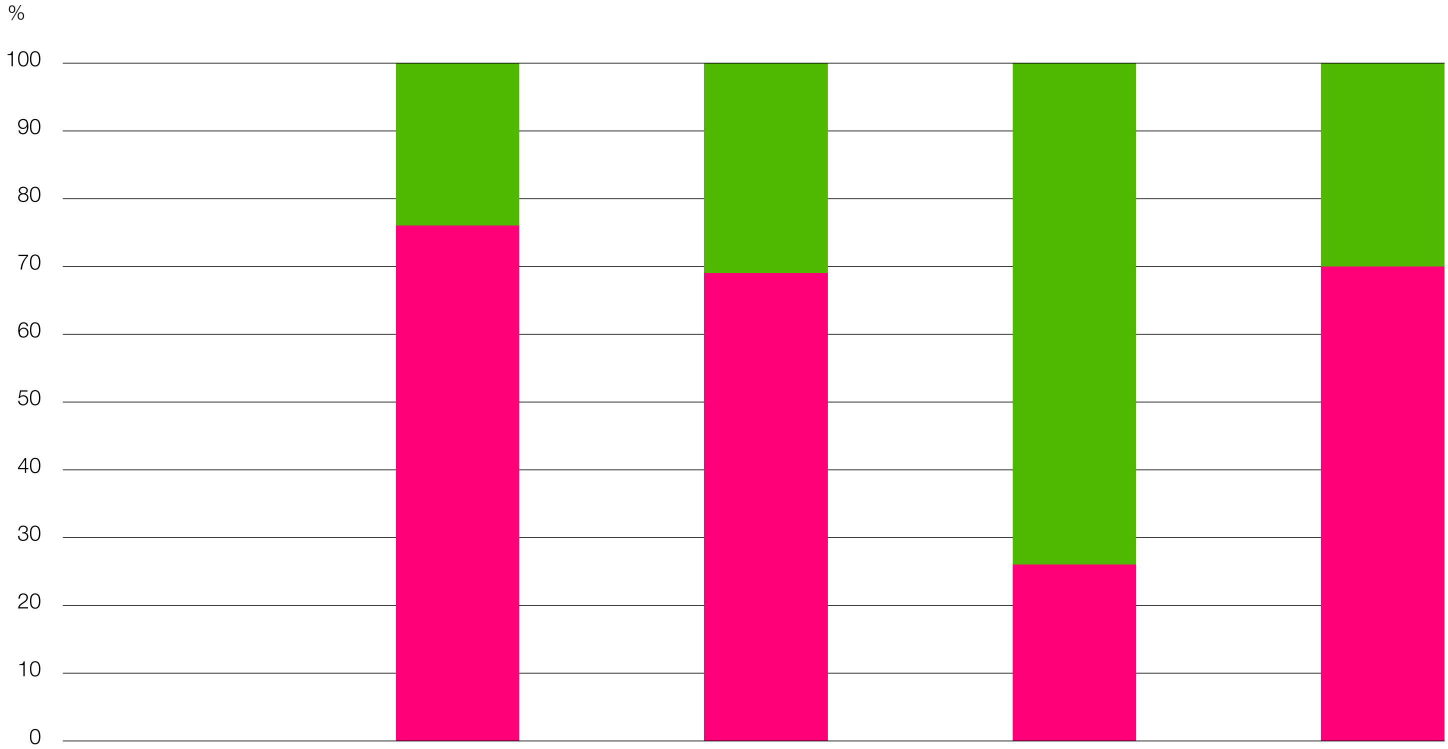
Source: BARB Establishment Survey

The audience for film on SVoD

A key difference in the content of SVoD and BVoD platforms in the UK is the limited availability of feature film on the broadcaster services. According to our analysis of Ampere Analytics data, in December 2020 feature films represented 63% of available titles on the three leading SVoD platforms (Netflix, Amazon Prime Video and Disney+) and 26% of available content hours.

Figure 4 shows the share of total viewing devoted to film or television programmes on the three leading streaming services by users (adults 16+) of these platforms. On average, UK SVoD users spent 30% of their viewing time on these services watching films. Amongst the top three providers, there is a stark difference between Netflix and Amazon Prime Video, on which users spent 24% and 31% of their viewing time respectively watching films, and Disney+, on which users spent 74% of their viewing time watching films. While Disney+ has a large number of series available to watch, such as platform exclusive *The Mandalorian*, most of its TV programmes are aimed at children, so the adults (16+) covered by this research were more attracted to Disney+'s catalogue of films which includes Disney and Pixar animations, Star Wars and Marvel Cinematic Universe titles, and films produced by 20th Century Fox.

Figure 4 Share of viewing by content on leading UK SVoD platforms, 2020



	Netflix	Amazon Prime Video	Disney+	Total
Film	24	31	74	30
TV series/other	76	69	26	70

Source: TRP Codex, 2020, All adults 16+
Note:
Titles are categorised according to the platform's metadata. 'TV series/other' includes episodic programming as well as non-film one-off titles such as stand-up specials.
'Total' refers to the overall share of viewing on Netflix, Amazon Prime Video and Disney+.

Top films on SVoD

Table 1 lists the top 10 most popular films viewed on the UK's three largest subscription streaming platforms in 2020. It should be noted that, unlike other top 10 or 20 lists in the Yearbook, entries in the table are derived from a sample so should be viewed as indicative rather than definitive.

Two of the films in the list, including the most popular title *Enola Holmes* (Netflix, average audience of 5 million adults [16+]) and *Borat Subsequent Moviefilm*, were initially intended for theatrical release but due to the pandemic were released directly on streaming services. Only three of the films in the list had wide UK theatrical releases: *Frozen II, Knives Out* and *Moana*. There are three UK films in the 2020 top 10 list compared with two in 2019.

Table 1 Top 10 films viewed on leading UK SVoD platforms, 2020 (ranked by average audience)

Rank	Title	Country of origin	Main provider	Year of release (UK)	Average audience (million)
1	Enola Holmes	UK/USA	Netflix	2020	4.9
2	Extraction	USA	Netflix	2020	4.1
3	The Old Guard	UK/USA	Netflix	2020	3.7
4	Frozen II	USA	Disney+	2019	3.6
5	Borat Subsequent Moviefilm	USA	Amazon	2020	3.4
6	The Christmas Chronicles: Part Two	USA	Netflix	2020	3.3
7	Hamilton	USA	Disney+	2020	3.2
8	Knives Out	USA	Amazon	2019	3.2
9	Eurovision Song Contest: The Story of Fire Saga	UK/USA	Netflix	2020	3.0
10	Moana	USA	Disney+	2016	2.6

Source: TRP Codex, Adults (16+); RSU
Notes:
The platforms covered by this table are Netflix, Amazon Video Prime and Disney+

Image: *Hamilton* © 2020 Lin-Manuel Miranda and Nevis Productions, LLC. All Rights Reserved

Country of origin of films on leading SVoD platforms

Table 2 shows a breakdown of feature film catalogues by country of origin for the three leading SVoD platforms in the UK in 2020. (It should be noted that titles in these catalogues have been assigned a primary nationality by Ampere Analysis, so a film which has been certified as British but was produced by a major Hollywood studio, would be considered a USA title.) In total, the film catalogues for these services featured titles from 73 different countries.

The USA was the most represented nationality for titles on each of the three platforms and represented 53% of all titles available from these providers. The concentration of American titles differs considerably between platforms, making up 41.5% of available Netflix films and 95% of films available on Disney+. The UK was the second most popular nationality for titles on Amazon Prime Video (11%) and Disney+ (1%, equal with Canada), and the third most popular on Netflix (5.5%) after India. The USA, India and the UK were the only three production countries to exceed a 5% share of any of the three catalogues.

Table 2 Share of leading UK SVoD film catalogue content by primary country of origin, 2020 (ranked by total percentage)

Primary country of origin	Netflix	Amazon Prime Video	Disney+	Total
USA	41.5	55.5	94.9	53.3
UK	5.5	10.6	1.4	8.8
India	16.9	5.0	0.3	8.1
Canada	2.1	4.9	1.4	4.0
France	2.8	2.1	0.0	2.2
Italy	0.7	2.7	0.0	2.0
Australia	1.0	1.8	0.0	1.5
China	2.9	0.9	0.3	1.5
Germany	1.2	1.4	0.0	1.3
Other (including non-assigned)	25.4	15.0	1.7	17.3

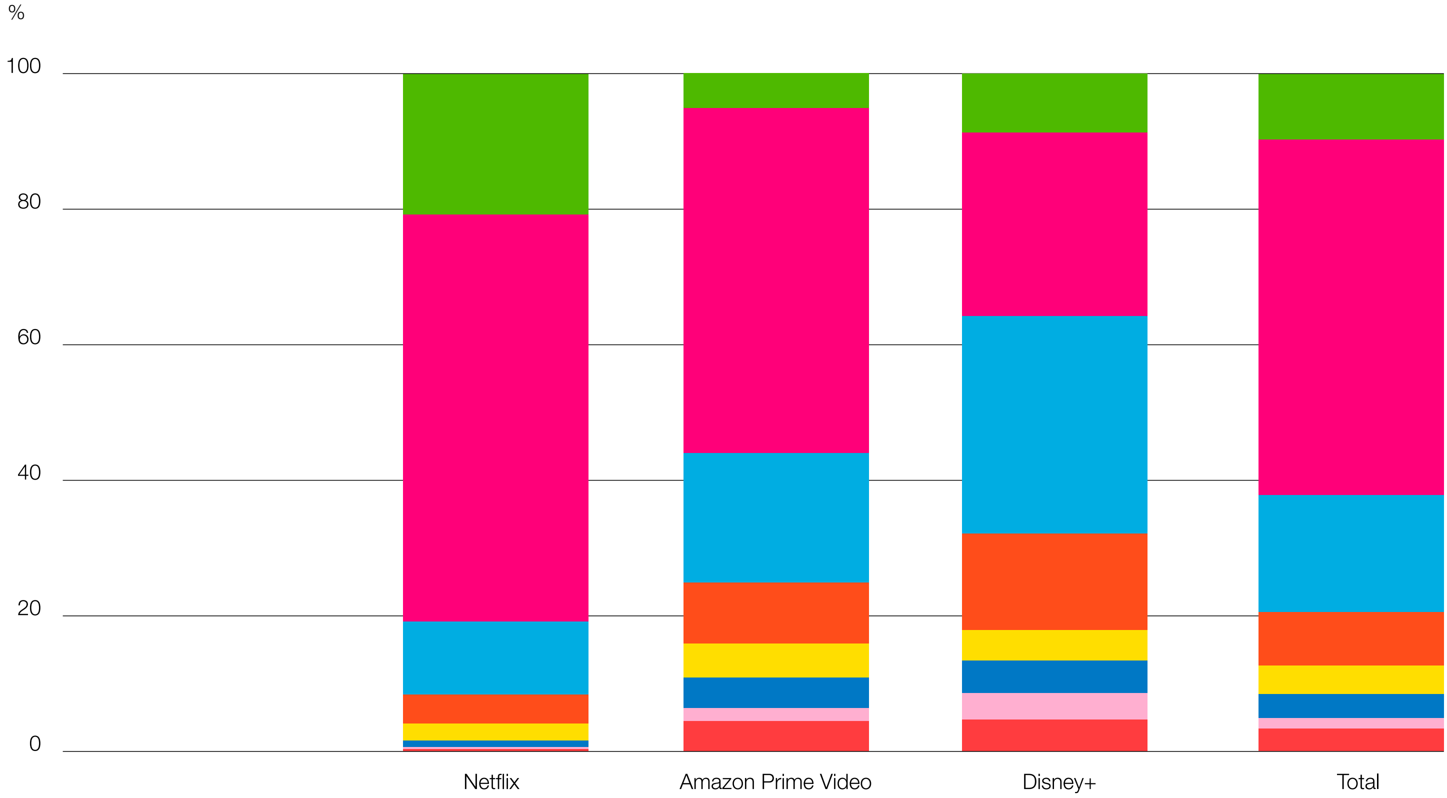
Source: Ampere Analysis, Catalogue audit, December 2020, Country of origin coding is supplied by Ampere Analysis and may not correspond with other published sources. Countries are listed if they have a 1% share or greater of the combined catalogues.
Note: 'Feature film' is defined as any film with a running time of 45 minutes or over.

Age of feature film content on leading SVoD platforms

Figure 5 shows the distribution of feature film content by age on the leading SVoD platforms in 2020. Of the three services, Netflix's catalogue had the greatest proportion of more recent titles, with 81% of titles being released between 2010 and 2020, and 21% of titles being released in 2019 or 2020. Disney+ had the only catalogue where less than half of the films had been released in 2010 or later (36%), as on launch it included a large number of older library titles including all of the major Walt Disney Animation Studios feature films starting with 1937's *Snow White and the Seven Dwarfs.*

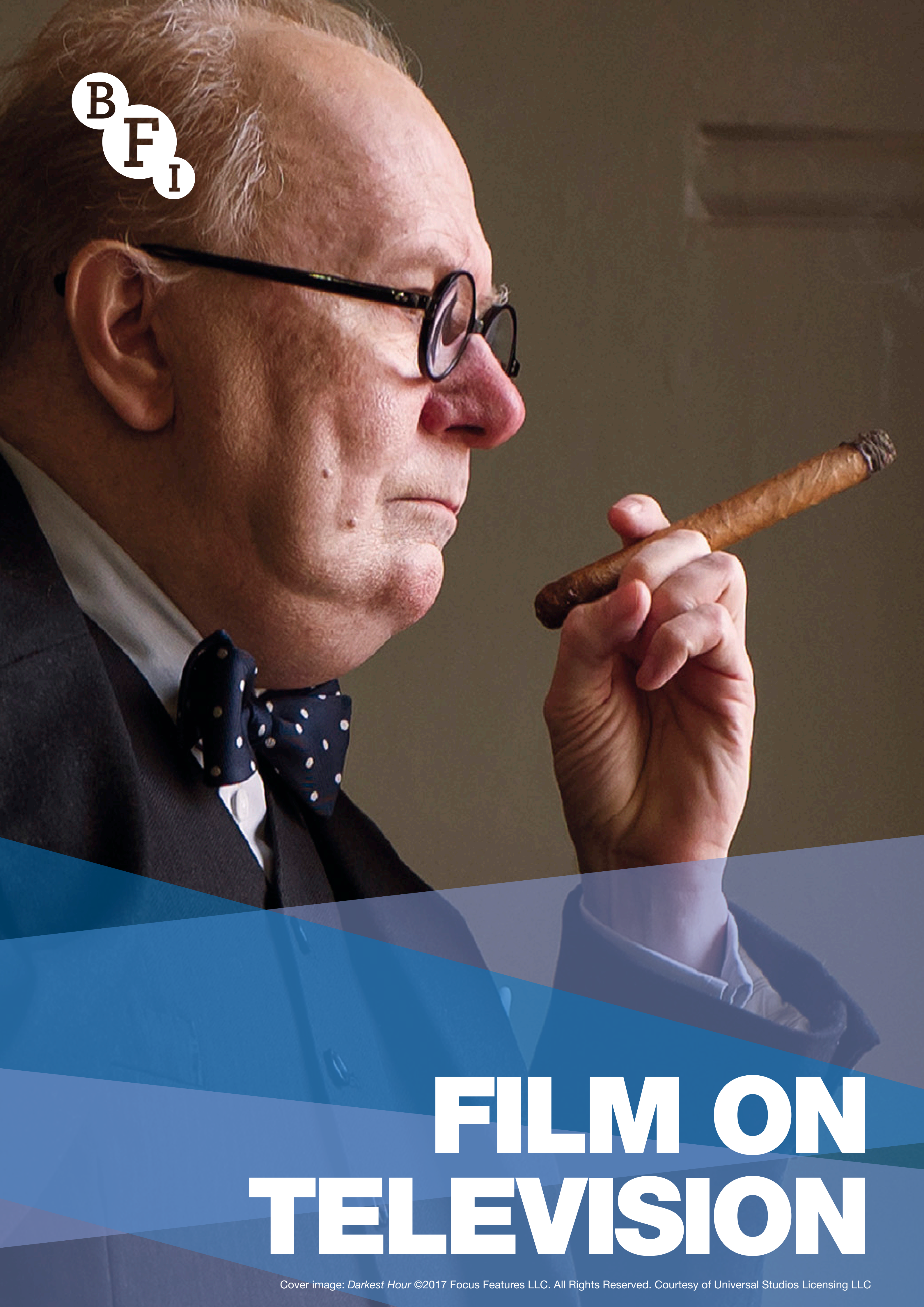
Amazon Prime Video had the largest film catalogue of the three providers with over 9,000 titles available in December 2020, compared to just over 4,000 titles for Netflix and under 700 for Disney+. This means that while Netflix's catalogue contained the largest number of films released in 2019 and 2020, Amazon Prime Video offered subscribers nine times as many newer titles as Disney+.

Figure 5 Feature film catalogue content by age on leading SVoD platforms, 2020



	Netflix	Amazon Prime Video	Disney+	Total
2019-2020	20.7	5.2	8.7	9.7
2010-2018	60.1	50.9	27.1	52.4
2000's	10.7	19.1	32.1	17.3
1990s	4.3	9.0	14.2	7.9
1980s	2.5	5.0	4.5	4.2
1970s	1.0	4.5	4.8	3.5
1960s	0.3	1.9	3.9	1.6
1950s and earlier	0.3	4.5	4.7	3.3

Source: Ampere Analysis, Catalogue audit, December 2020, year coding is supplied by Ampere Analysis and may not correspond with other published sources.
Note: 'Feature film' is defined as any film with a running time of 45 minutes or over.



FILM ON TELEVISION

FACTS IN FOCUS

Over 97% of UK individuals spent time watching at least one of over 11,000 unique film titles shown on British television in 2020. Across platforms, multi-channel broadcasts had the greatest film reach (93%) followed by terrestrial (91%) and pay TV (57%).

- There were 11,189 unique film titles on television in 2020, including 1,161 on terrestrial television, 1,800 on pay film channels and 9,467 on other multi-channels.
- There were 1,620 film transmissions on terrestrial channels (up from 1,331 in 2019). Of these, 486 were UK films (up from 390 in 2019).
- There were 51,280 film transmissions on pay TV film channels and 57,851 film transmissions on other multi-channels.
- The most popular film on terrestrial television in 2020 was the independent UK production *Darkest Hour*, attracting an average audience of 5.3 million viewers for its May Bank Holiday weekend premiere on BBC One.
- *The Grinch* attracted the highest audience for a single transmission on non-film subscription multi-channels in 2020, with 1.2 million viewers on ITV2.
- *Toy Story 4* attracted the highest single audience on pay TV film channels, with 1.8 million viewers on Sky Cinema Premiere.
- In 2020, 58.8 million people (aged 4+) watched at least one film on a broadcast television channel.
- The estimated value of feature film to UK broadcasters in 2020 was £738 million (down from £873 million in 2019).

Film on television

Programming on the terrestrial channels

In 2020, 91% of all individuals (aged 4+) in the UK watched at least one film on a terrestrial television channel. (Terrestrial television is used here to describe the previous national terrestrial analogue services, all of which have some degree of public service obligation.) Table 1 shows the total number of feature films broadcast on the five terrestrial channels in 2020 and the number of UK titles broadcast in that time. UK films are broken down into recent titles (films released theatrically between 2011 and 2020) and older titles (released pre-2011).

There were 1,620 film transmissions on terrestrial television in 2020, up from 1,331 in 2019. The increase is primarily due to the broadcasters' need to fill scheduling gaps caused by production pauses and a lack of live sports and entertainment programming resulting from the COVID pandemic. Three in 10 (30%) films shown were UK titles. Channel 5 broadcast the greatest number of films overall (505), BBC Two showed the greatest number of UK films overall (136) and Channel 4 showed the greatest number of recent UK films (74).

In total, the terrestrial channels broadcast 1,161 unique film titles, a slight increase on the 1,101 unique titles shown in 2019.

Table 1 Feature films broadcast[1] on terrestrial television 2020

	Number of films broadcast	Number of UK films[2] broadcast	UK films as % of total	Number of recent[3] UK films broadcast	Recent UK films as % of total films broadcast
BBC One	199	75	37.7	60	30.2
BBC Two	365	136	37.3	68	18.6
ITV	131	54	41.2	19	14.5
Channel 4	420	87	20.7	74	17.6
Channel 5	505	134	26.5	41	8.1
Total	**1,620**	**486**	**30.0**	**262**	**16.2**

Source: BARB, BFI RSU analysis

[1] Includes repeat broadcasts of individual title.

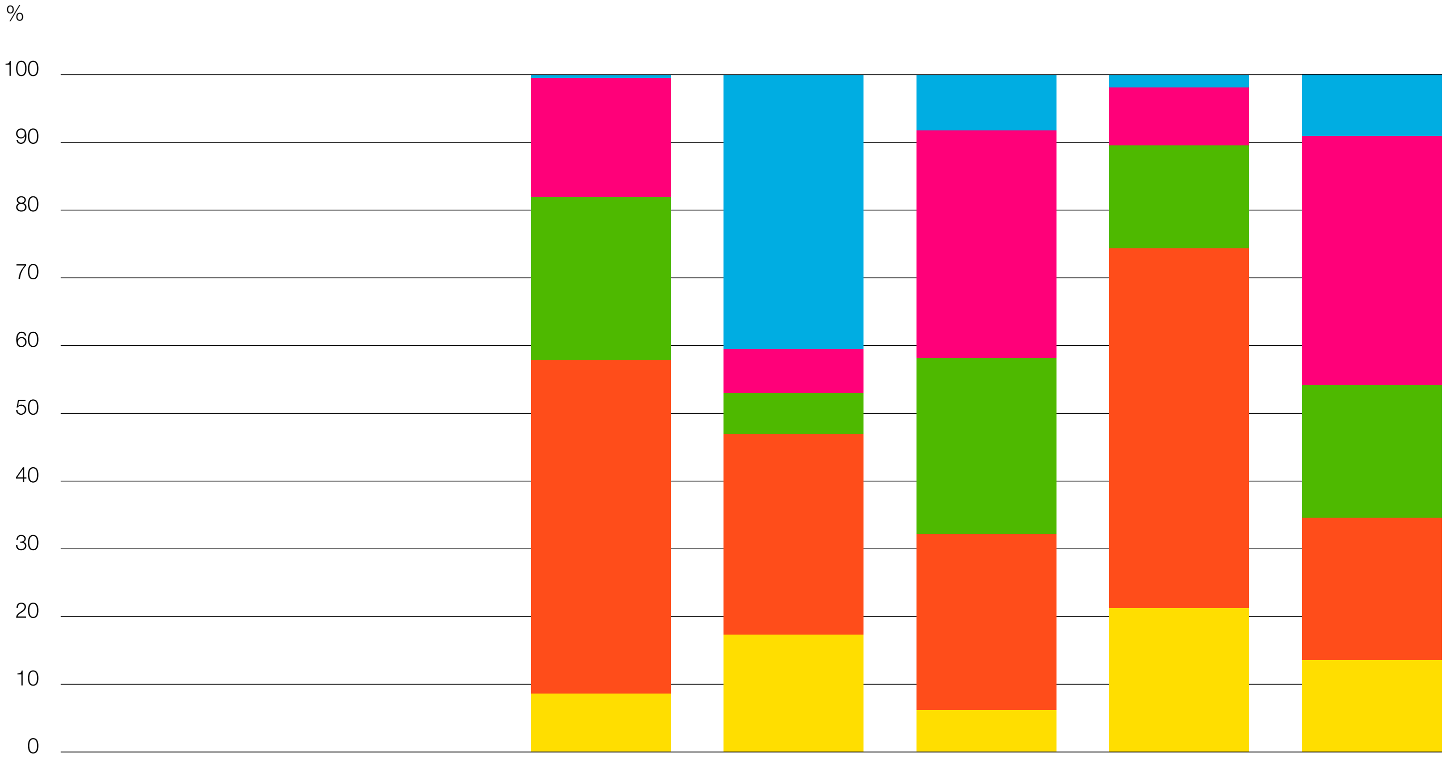
[2] UK films are defined as those which have been certified as such by the Secretary of State for Digital, Culture, Media and Sport under Schedule 1 of the Films Act 1985, or under one of the UK's official bi-lateral co-production agreements, or a film which is a de-facto UK film by virtue of being made in whole or part in the UK by a UK production company.

[3] A recent film is one which has been theatrically released, or intended for release, in the UK since 2011.

Figure 1 shows the percentage of films broadcast on the terrestrial channels in 2020 across five age-range categories. (For this analysis, the age of a film is determined by its year of release in the UK, not production year.)

Newer titles made up a larger share of Channel 4's film output than of the other terrestrial channels. Just over one fifth (21%) of the films shown on Channel 4 in 2020 were less than five years old at the time of their broadcast, while 74% of its films were less than 10 years old. In contrast, over 40% of films broadcast on BBC Two (47%), Channel 5 (46%) and ITV (42%) had been released theatrically at least 20 years before 2020.

Figure 1 Percentage of feature film by age on terrestrial channels, 2020



	BBC One	BBC Two	ITV	Channel 4	Channel 5
50+ years	0.5	40.5	8.4	1.9	9.1
20-49 years	17.6	6.6	33.6	8.6	36.8
10-19 years	24.1	6.0	26.0	15.2	19.6
5-9 years	49.2	29.6	26.0	53.1	21.0
Less than 5 years	8.5	17.3	6.1	21.2	13.5

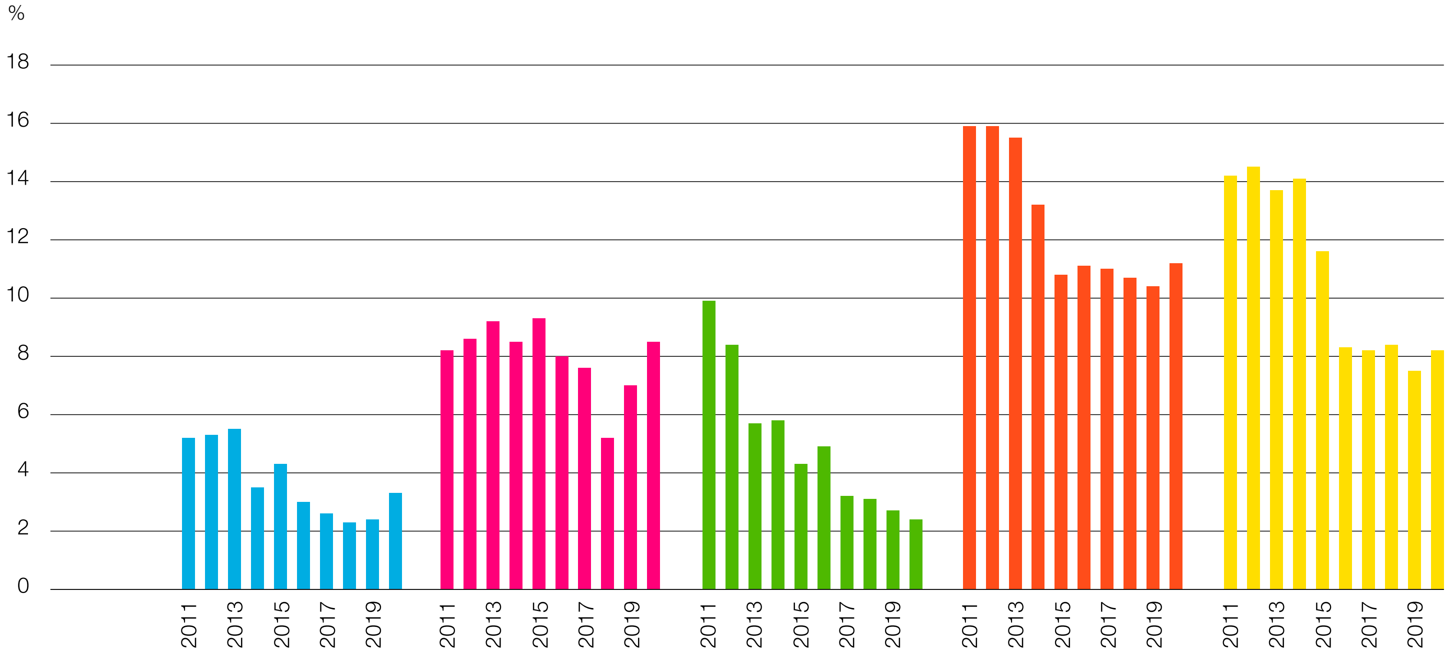
Source: BARB, BFI RSU analysis

Film on terrestrial television, 2011-2020

As Figure 2 shows, the share of total programming time dedicated to feature film varied widely across the terrestrial channels between 2011 and 2020. (The data in this chart has been recalculated on the basis of a new methodology used by BARB to categorise programme content which has identified a greater number of feature film transmissions on terrestrial television than would have been included previously.) In most years, Channel 4 had the largest proportion of film hours in its schedule, while BBC One generally had the smallest. In 2020, however, while Channel 4 had the greatest share of film hours (11%), ITV had the smallest (2%).

As the chart shows, the trend to 2019 had been for an overall decline in the proportion of programming time allotted to film but this was reversed in 2020, with four of the five terrestrial channels showing a year-on-year increase in their schedules. In large part, this is explained by the need to fill programming gaps caused by the pandemic. The total share of airtime devoted to film across the five channels increased from 5% in 2019 to 6% in 2020. Despite the increase, the figure for 2020 is almost one third less than the average share between 2011 and 2015.

Figure 2 Film as a percentage of total programming hours by channel, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
BBC One	5.2	5.3	5.5	3.5	4.3	3.0	2.6	2.3	2.4	3.3
BBC Two	8.2	8.6	9.2	8.5	9.3	8.0	7.6	5.2	7.0	8.5
ITV	9.9	8.4	5.7	5.8	4.3	4.9	3.2	3.1	2.7	2.4
Channel 4	15.9	15.9	15.5	13.2	10.8	11.1	11.0	10.7	10.4	11.2
Channel 5	14.2	14.5	13.7	14.1	11.6	8.3	8.2	8.4	7.5	8.2

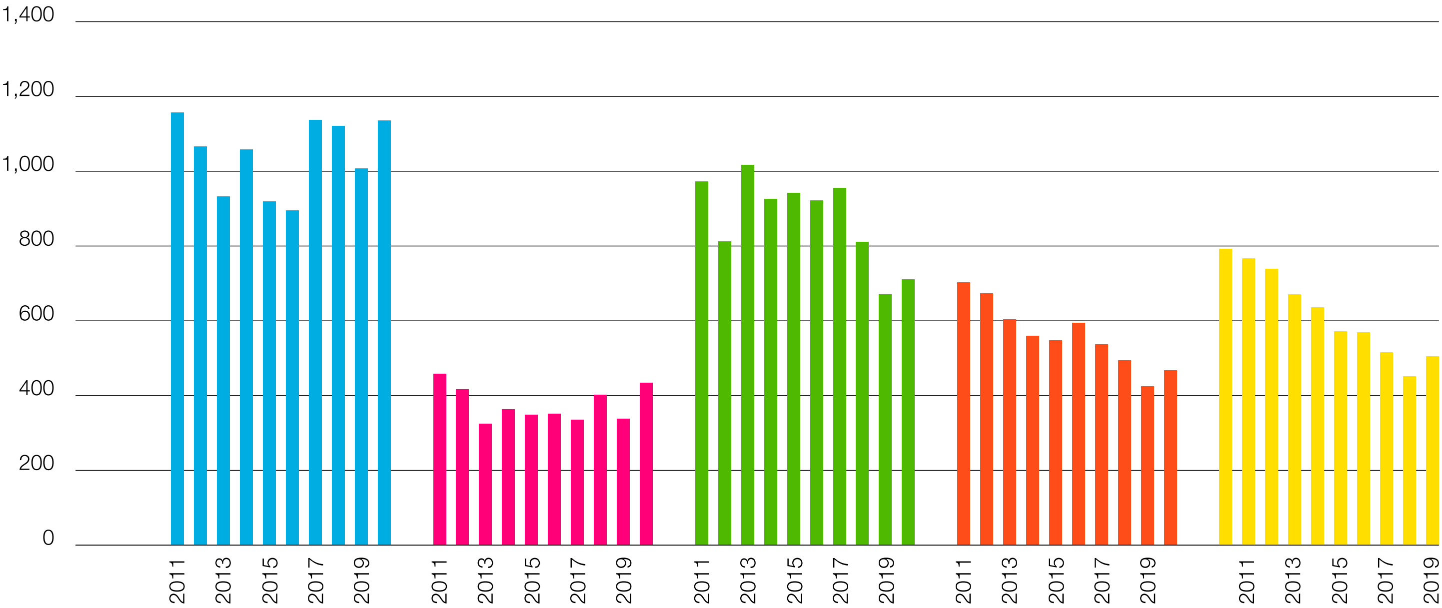
Source: BARB, BFI RSU analysis
Notes:
Programming hours: 06:00-27:00. (For reporting purposes, the BARB broadcast day runs for 24 hours from 6:00. Times beyond 24:59 are reported using a thirty-hour clock.).
Film duration includes commercial breaks and promotions within broadcast on commercial channels.
Figures are for all network broadcasts; they exclude regional-only broadcasts.
Figures have been revised since publication of the 2020 Statistical Yearbook.

Audience for film on terrestrial television, 2011-2020

As Figure 3 shows, there was an overall decline in the average audience for feature film across all programming hours on the five terrestrial channels from 2011 to 2019 which is partly attributable to changing screen habits, particularly among younger viewers, and the growth of competition from on-demand services during the period. In 2020, however, all five terrestrial broadcasters saw an increase in the average film audience compared with 2019. In large part, this was due to a surge in overall screen viewing during periods of lockdown in the year. (For more on the audience for film on television, see the Audiences chapter.)

BBC One and ITV had the highest average audiences between 2011 and 2020, while BBC Two had the lowest. In 2020, the average audience for film on BBC One was 1.14 million (up 13% on 2019), on ITV it was 712,000 (+6% on 2019), on Channel 5 it was 506,000 (+12%) and on Channel 4 it was 468,000 (+10%). BBC Two's average film audience in the year was 435,00, a 28% increase on 2019, and the biggest year-on-year rise in average audience across the five terrestrial channels.

Figure 3 Average audience for film, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
BBC One	1,158	1,067	933	1,059	920	896	1,138	1,122	1,008	1,137
BBC Two	459	418	325	364	350	352	336	403	339	435
ITV	973	813	1,018	926	943	922	956	812	672	712
Channel 4	704	674	605	560	549	595	538	495	426	468
Channel 5	793	768	740	672	636	572	570	517	452	506

Source: BARB, BFI RSU analysis
See notes to Figure 2.
Figures have been revised since publication of the 2020 Statistical Yearbook on the basis of a new methodology used by BARB to categorise programme content.

Top films on terrestrial television

The most popular film on terrestrial television in 2020 was the independent UK production *Darkest Hour*, which attracted an average audience of 5.3 million viewers for its May bank holiday premiere on BBC One during the first national lockdown (Table 2). *Darkest Hour* was one of five network premieres in the top 10 in 2020 and is the only UK qualifying title.

Nine of the year's top 10 most popular film transmissions on terrestrial television were shown on BBC channels; the remaining title was shown on Channel 4.

Table 2 Top 10 films[1] on terrestrial television, 2020

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Darkest Hour*	BBC One	UK/USA	2018	5.3
2	Indiana Jones and the Kingdom of the Crystal Skull	BBC One	USA	2008	4.4
3	Grease	BBC One	USA	1978	4.1
4	Sully*	BBC Two	USA	2016	3.9
5	Raiders of the Lost Ark	BBC One	USA	1981	3.6
6	Spider-Man: Homecoming*	BBC One	USA	2017	3.6
7	The Greatest Showman*	Channel 4	USA	2017	3.5
8	Indiana Jones and the Temple of Doom	BBC One	USA	1984	3.5
9	The Sound of Music	BBC Two	USA	1965	3.4
10	Coco*	BBC One	USA	2018	3.4

Source: BARB, RSU analysis

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

* Film shown for the first time on terrestrial television.

The most popular UK qualifying film on terrestrial television in 2020 was the only title to appear in the overall top 10 list of films on terrestrial channels. *Darkest Hour* is one of five network premieres in the top 10 UK films list and one of only two titles not backed by the Hollywood majors. The other independent UK title, *Paddington 2*, was the overall most popular film on terrestrial television in 2019 and appears in this and the following table for the second consecutive year.

As with the overall 2020 top 10 list, the majority of the top 10 UK films on terrestrial television were shown on BBC channels. Two titles were shown on Channel 4 and two were shown on ITV.

Table 3 Top 10 UK qualifying films[1] on terrestrial television, 2020

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Darkest Hour*	BBC One	UK/USA	2018	5.3
2	Dunkirk*	BBC One	UK/USA	2017	3.4[#]
3	Paddington 2	BBC One	UK/Fra	2017	3.3
4	Murder on the Orient Express*	Channel 4	UK/USA	2017	3.0
5	Mamma Mia! Here We Go Again*	ITV	UK/USA	2018	2.6
6	Beauty and the Beast	BBC One	UK/USA	2017	2.5
7	The Jungle Book	Channel 4	UK/USA	2016	2.5
8	Jurassic World: Fallen Kingdom*	ITV	UK/USA	2018	2.5
9	Cinderella	BBC Two	UK/USA	2015	2.2
10	Guardians of the Galaxy	BBC One	UK/USA	2014	2.2

Source: BARB, BFI RSU analysis

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

* Film shown for the first time on terrestrial television.

[#] The actual audience for *Dunkirk* is smaller (3.37 million) than both *The Sound of Music* (3.42 million) and *Coco* (3.41 million) which appear in Table 2.

Seven of the top 10 most popular UK independent films on terrestrial television in 2020 were shown on BBC channels while three were shown on Channel 4 (Table 4). Two of the films, *Philomena* and *Victoria & Abdul* were BBC Film (previously BBC Films) productions, while *Three Billboards Outside Ebbing, Missouri* was a Film4 production. Seven of the films were network premieres.

Table 4 Top 10 UK independent films[1] on terrestrial television, 2020

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Darkest Hour*	BBC One	UK/USA#	2018	5.3
2	Paddington 2	BBC One	UK/Fra	2017	3.3
3	Three Billboards Outside Ebbing, Missouri*	Channel 4	UK/USA#	2018	2.1
4	The Guernsey Literary and Potato Peel Pie Society*	BBC Two	UK/Fra/USA#	2018	2.0
5	Early Man*	BBC One	UK/Fra	2018	1.8
6	Red Sparrow*	Channel 4	UK/USA#	2018	1.8
7	Philomena	BBC One	UK/Fra	2013	1.6
8	Victoria & Abdul	BBC Two	UK	2017	1.6
9	Finding Your Feet*	Channel 4	UK	2018	1.6
10	Whisky Galore!*	BBC Two	UK	2016	1.5

Source: BARB, BFI RSU analysis

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

* Film shown for the first time on terrestrial television.

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

Film on multi-channel television

In 2020, 93% of UK individuals watched at least one film on multi-channel television (Freeview/satellite/cable). For the purposes of this section, multi-channels include all free-to-air and paid (non-film subscription) channels, with the exclusion of the traditional terrestrial channels. It should be noted that the new methodology used by BARB to standardise the categorisation of broadcast output has identified a greater number of feature film transmissions on multi-channels than would have been included in previous years, so the data in this section are not directly comparable with those published in previous Yearbooks.

Table 5 shows the number of film transmissions, the average film audience, the top film and the average audience for the top film, for all channels which broadcast 30 or more feature films in 2020. The list is headed by 14 dedicated film channels led by the Sony branded channels Sony Movies Classic (5,448 transmissions), Sony Movies Action (4,989 transmissions) and Sony Movies (4,957 transmissions). Outside the leading film-only channels, the greatest number of films was screened by the general entertainment channels Paramount Network (1,958 transmissions) and London Live (1,927 transmissions). However, the largest average audiences for film were generated by ITV2 (305,000 viewers) and ITV3 (237,00).

In total, 9,467 unique film titles were broadcast on non-film subscription multi-channel television across 57,851 slots in 2020. The most popular film in terms of cumulative audience was the James Bond feature *Spectre*, which attracted over 7.5 million viewers across five transmissions on ITV2.

Table 5 Feature film on other multi-channels, 2020

Channel	Number of films broadcast	Average audience (000)	Top film[1]	Audience for top film (000)
Sony Movies Classic	5,448	17	Awakenings	157
Sony Movies Action	4,989	39	Midway (1976)	234
Sony Movies	4,957	54	Die Hard with a Vengeance	477
Talking Pictures	3,851	39	The Likely Lads	200
Rok TV	3,483	3	Something Special	48
Utsav Gold	3,328	3	War	91
Sony MAX	3,155	3	Pati Patni Aur Woh	60
Sony MAX2	3,103	2	Ghulami	35
TCM	3,030	16	The Dead Pool	142
B4U Movies	2,931	2	Jab We Met	38
Film4	2,845	158	Hidden Figures	838
Zee Cinema	2,688	3	The Accidental Prime Minister	69
Colors Cineplex	2,462	2	Namastey London	42
Horror Channel	2,143	41	Exorcist: The Beginning	236
Paramount Network	1,958	78	The Good, the Bad and the Ugly	525
London Live	1,927	5	Mother Lode	59
SAB	1,718	2	Mardaani	55
5STAR	1,607	101	Bridget Jones's Baby	510
ITV4	1,371	168	Diamonds Are Forever	680
Syfy	962	16	Matilda	138
ITV2	929	305	The Grinch	1,189
Zee TV	791	3	Uri: The Surgical Strike	42
Comedy Central	564	65	Pretty Woman	296
5SELECT	347	27	Stephen King's Thinner	155
Movies 24	334	7	The Secret Ingredient	53
E4	309	224	Independence Day	714
Kanshi TV	245	<1	Kanoon Apna Apna	13
Sky Arts	196	23	Freddy Mercury: The Great Pretender	297
Sky One	188	128	The Polar Express	758
PBS America	149	11	Sammy Davis Jr: I've Gotta Be Me	50
ITV3	117	237	Carry On Camping	591
BBC Four	108	233	Billy Elliot	632
Sky Comedy	82	27	Ali G Indahouse	89
Sky Atlantic	81	34	The Godfather: Part II	137
W	63	53	Groundhog Day	155
Comedy Central Extra	63	9	See No Evil, Hear No Evil	97
5Spike	51	76	The Battle of Britain	236
Dave	47	180	The Da Vinci Code	348
4seven	42	58	Den of Thieves	143
MTV	41	29	The Twilight Saga: Breaking Dawn – Part 2	95

Source: BARB, BFI RSU analysis
Notes:
[1] Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.
Excludes channels with <30 unique cinema film titles broadcast during 2020.

The 2018 animated feature *The Grinch* gained the year's highest average audience for a single transmission on multi-channel television, attracting 1.2 million viewers for its late December broadcast on ITV2 (Table 6). Interestingly, the second most popular film was the 2011 pandemic thriller *Contagion*, which was shown (also on ITV2) directly following the Government's announcement of the first nationwide lockdown in March. The only top 10 film not shown on ITV2 in 2020 was the biopic *Hidden Figures* which attracted an average audience of over 800,000 for its early May transmission on Film4.

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

Table 6 Top 10 films[1] on other multi-channels, 2020

	Title	Channel	Country of origin	Year of release	Audience (million)
1	The Grinch (2018)	ITV2	USA	2018	1.2
2	Contagion	ITV2	USA	2011	1.2
3	Spectre	ITV2	UK/USA	2015	1.2
4	Justice League	ITV2	UK/USA/Can	2017	1.0
5	The Legend of Tarzan	ITV2	UK/USA	2016	1.0
6	Uncle Buck	ITV2	USA	1990	1.0
7	Skyfall	ITV2	UK/USA	2012	0.9
8	Jurassic World: Fallen Kingdom	ITV2	UK/USA	2018	0.9
9	Hidden Figures	Film4	USA	2017	0.8
10	Guardians of the Galaxy: Vol. 2	ITV2	USA/NZ/Can	2017	0.8

Source: BARB, BFI RSU analysis

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

In 2020, 57% of all UK individuals watched at least one film on a pay tv film channel. (Currently the pay TV category only includes the additional subscription TV film channels operated by Sky.) These channels showed 1,800 unique titles across 51,280 slots during the year, with an average audience of 11,000. In 2019, they showed 2,015 unique titles across 48,663 slots (the average audience was the same at 11,000).

Table 7 shows the top 10 titles on pay TV film channels in 2020, ranked by the highest average audience for a single transmission. All of the top 10 films were shown on Sky Cinema Premiere. *Toy Story 4* achieved the year's highest single audience, with an average of 1.8 million viewers, followed by *Frozen II* (1.6 million viewers) and *Aladdin* (1.4 million viewers). All top three films are Disney or Pixar features. This is likely to be the last time Disney-owned titles will feature in this list as Disney content began to be removed from these channels following the launch of the Disney+ streaming service in the first half of 2020.

Aladdin is one of three UK qualifying films in the list (the others are *Four Kids and It* and *Rocketman*). *Four Kids and It* is the only UK independent film in the top 10. *Aladdin* gained the largest cumulative audience on pay TV in 2020, with a total of 6.4 million viewers over 210 transmissions across six of Sky's dedicated film channels.

Table 7 Top 10 films[1] on pay TV film channels, 2020

	Title	Channel	Country of origin	Year of release	Audience (million)
1	Toy Story 4	Sky Cinema Premiere	USA	2019	1.8
2	Frozen II	Sky Cinema Premiere	USA	2019	1.6
3	Aladdin	Sky Cinema Premiere	UK/USA	2019	1.4
4	Jumanji: The Next Level	Sky Cinema Premiere	USA	2019	1.2
5	The Secret Life of Pets 2	Sky Cinema Premiere	USA/Fra/Jpn	2019	1.2
6	Four Kids and It	Sky Cinema Premiere	UK/Ire	2020	1.1
7	Rocketman	Sky Cinema Premiere	UK/USA	2019	1.1
8	The Angry Birds Movie 2	Sky Cinema Premiere	Fin/USA	2019	1.0
9	Trolls World Tour	Sky Cinema Premiere	USA	2020	1.0
10	Shazam!	Sky Cinema Premiere	USA/Can	2019	0.9

Source: BARB, BFI RSU analysis

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

Image: *Frozen II* ©2019 Disney. All Rights Reserved

Film broadcasts and audience for film on all television channels, 2011-2020

Table 8 shows the total number of films broadcast on terrestrial and pay TV channels from 2011 to 2020 and data for other multi-channels for 2020 only. (Historical data for film broadcasts on other multi-channels prior to 2020 are unavailable due to the change in methodology used by BARB to categorise broadcast output.)

The annual number of film transmissions on terrestrial television had been in steady decline up to 2018. However, there was a year-on-year increase in the number of films shown in both 2019 (+3%) and 2020 (+22%). The annual number of film transmissions on Sky's pay TV film channels was fairly static for most of the period but increased by 5% in 2020, due primarily to the July launch of additional film channel, Sky Cinema Animation.

In terms of unique film titles available to television viewers in 2020, 1,161 films were shown on terrestrial television, 1,800 on pay TV and 9,467 on multi-channel television. Overall, 11,189 individual film titles were shown across all television channels in 2020. (The overall total is less than the sum of individual categories, as some titles were shown on multiple platforms across the year.)

Table 8 Total number of film transmissions on television (except pay-per-view), 2011-2020

Number of transmissions	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Terrestrial	3,092	3,004	2,566	2,280	2,128	1,832	1,666	1,298	1,331	1,620
Pay TV film channels	45,611	45,913	47,216	47,081	47,850	47,274	48,221	47,791	48,663	51,280
Other multi-channel	-	-	-	-	-	-	-	-	-	57,851
Total	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**110,751**

Source: BARB, BFI RSU analysis

Table 9 shows the reach of feature film broadcasts on television between 2011 and 2020. The table shows both the total number of individuals who have watched at least one film in a calendar year and this value as a percentage of the total UK population. It should be noted that this is a different audience measure to those used in previous Yearbooks. (As with the annual number of film transmissions, historical data on other multi-channel viewing is not available due to the change in the methodology used by BARB to categorise broadcast output.)

In 2020, 58.8 million people watched at least one film on a broadcast television channel, which represents 97% of all individuals in the UK. Across platforms, multi-channel broadcasts had the greatest film reach (56.3 million; 92.9%) followed by terrestrial (55.4 million; 91.3%) and pay TV (34.6 million; 57.0%).

As Table 9 shows, while there was a general decrease in film viewing on terrestrial channels between 2011 and 2019, film viewing on pay TV increased significantly over the period. Both platforms saw increases in 2020, however, although the rise for terrestrial channel film viewing was small. (In percentage terms, terrestrial reach recorded a decline between 2019 and 2020 primarily due to a 0.5% year-on-year increase in the size of the UK population.) The greater rise in viewing on pay TV film channels was partly due to the launch of Sky Cinema Animation.

Table 9 Total film viewing reach on television in millions and % of all individuals aged 4+, 2011-2020

Reach (million)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Terrestrial	57.1	56.6	57.0	57.4	56.6	57.3	57.0	56.7	55.3	55.4
Pay TV film channels	17.3	18.3	21.4	26.8	29.3	31.1	29.0	27.7	29.5	34.6
Other multi-channel										56.3
Total										**58.8**

Reach (% all individuals 4+)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Terrestrial	99.4%	98.6%	98.7%	98.1%	97.2%	97.0%	95.7%	94.1%	91.7%	91.3%
Pay TV film channels	30.1%	31.8%	37.0%	45.8%	50.3%	52.7%	48.7%	46.0%	48.8%	57.0%
Other multi-channel										92.9%
Total										**97.0%**

Source: BARB, BFI RSU analysis
Note:
The reporting metric in the table differs to those used in previous Yearbooks. The current data now represent the total number and % of individuals (4+) who have watched at least 3 consecutive minutes of a film in a given calendar year.

The value of feature film to broadcasters

We estimate the value of feature film to UK broadcasters to have been £736 million in 2020, down from £873 million in 2019 (the latter value has been updated since publication of the 2020 Statistical Yearbook). However, the value attributed to UK films increased in 2020, rising from £190 million in 2019 to £221 million.

Television values are based on a model developed by Ampere Analysis. Values are estimated by dividing broadcaster revenues (from subscriptions, advertising spend and licence fee share) by the percentage of content spend attributed to film.

THE UK FILM MARKET AS A WHOLE

Cover image: *Come Away* © Maginot Line, LLC 2020. Courtesy of Signature Entertainment

FACTS IN FOCUS

UK filmed entertainment market revenues totalled £2.64 billion in 2020, the lowest figure since 2000. With cinemas either closed or operating under restrictions for most of the year, digital video became the most significant component of the film value chain, with gross revenues of £1.35 billion.

- In 2020, the total filmed entertainment market in the UK was worth an estimated £2.64 billion, down 24% from £3.46 billion in 2019.
- Revenues from digital video were £1.35 billion, an increase of 40% from £966 million in 2019.
- Digital video accounted for 51% of the total market, compared with 28% in 2019.
- Gross revenues for UK film were an estimated £948 million, down from £1.25 billion in 2019.
- In 2020, the UK had the fourth largest filmed entertainment market in the world after the USA, China and Japan, and is expected to retain that position over the next four years.

The UK film market as a whole

UK filmed entertainment market revenues

The COVID-19 pandemic had a significant impact on the UK filmed entertainment market in 2020, with cinemas either closed or operating under restrictions for most of the year, and – with an audience still hungry for films – record numbers of people accessing digital video.

UK filmed entertainment market revenues totalled £2.64 billion in 2020, the lowest figure since 2000, and a decline of 24% from £3.46 billion in 2019 (Table 1). The sharpest decrease was in theatrical revenues which fell by 76% from £1.25 billion in 2019 to £307 million in 2020. The box office accounted for only 12% of the year's gross revenues, compared with 36% in 2019.

The trend towards digital entertainment accelerated in 2020, with revenues rising by 40% from £966 million in 2019 to £1.35 billion. For the first time digital video represented the most significant component of the film value chain in the UK, accounting for 51% of the total market, compared with 28% in 2019. Aggregate physical video revenues, however, continued to decline, falling by 33% from £370 million in 2019 to £251 million. As a share of the total market, physical video revenues dropped slightly to 9%.

Aggregate television revenues also declined in 2020, falling from £873 million in 2019 to £736 million. (It should be noted that much of this accrued to the television industry rather than to the suppliers of film.) Revenues fell despite an uptick in film viewing on television, due primarily to a contraction in advertising expenditure and a reduction in average subscription prices for pay TV services. Combined television revenues represented 28% of the total market in 2020, up from 25% in 2019.

Gross revenues for UK films in 2020 were estimated to be £931 million, with the share for British films highest in the theatrical market (46%) and lowest in the pay TV and terrestrial/multi-channel television markets (both at 30%). Overall, the share of revenues attributed to UK films in 2020 was 35%, down slightly from 36% in 2019.

Table 1 UK filmed entertainment market, 2019 and 2020

	2019			2020		
	Total gross value (£ million)	Attributable to UK films (£ million)	UK film as % of total gross	Total gross value (£ million)	Attributable to UK films (£ million)	UK film as % of total gross
Theatrical	1,254	597	48	307	143	46
Physical video rental	23	8	35	17	6	35
Physical video retail	347	139	40	233	82	35
Digital video	966	320	33	1,351	480	36
Pay TV	655	135	21	513	154	30
Terrestrial and multi-channel TV	218	55	25	223	67	30
Total	**3,463**	**1,254**	**36**	**2,644**	**931**	**35**

Source: Comscore, BASE, Official Charts Company, Ampere, Omdia, BFI RSU analysis

Notes:

'Theatrical' is the total gross UK theatrical revenue (including VAT) in the calendar years 2019 and 2020 for all films exhibited in the UK. See The box office 2020 chapter.

'Physical video rental' is the total revenue from physical video rental (DVD, Blu-ray, etc) transactions in the calendar years 2019 and 2020. UK share is based on an estimate derived from knowledge of UK film share in the physical video retail market. See Film on physical video chapter.

'Physical video retail' is the total revenue from physical video retail transactions in the calendar years 2019 and 2020. See Film on physical video chapter.

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

The television values are retail equivalent values calculated from the dataset of films shown on UK television. Calculations are based on a methodology developed by Ampere Analysis: values are estimated by dividing broadcaster revenues (from subscriptions, advertising spend and licence fee share) by the percentage of content spend attributed to film. Television values cover terrestrial, pay TV and other multi-channel TV. See Film on television chapter.

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

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

Figures may not sum to totals due to rounding.

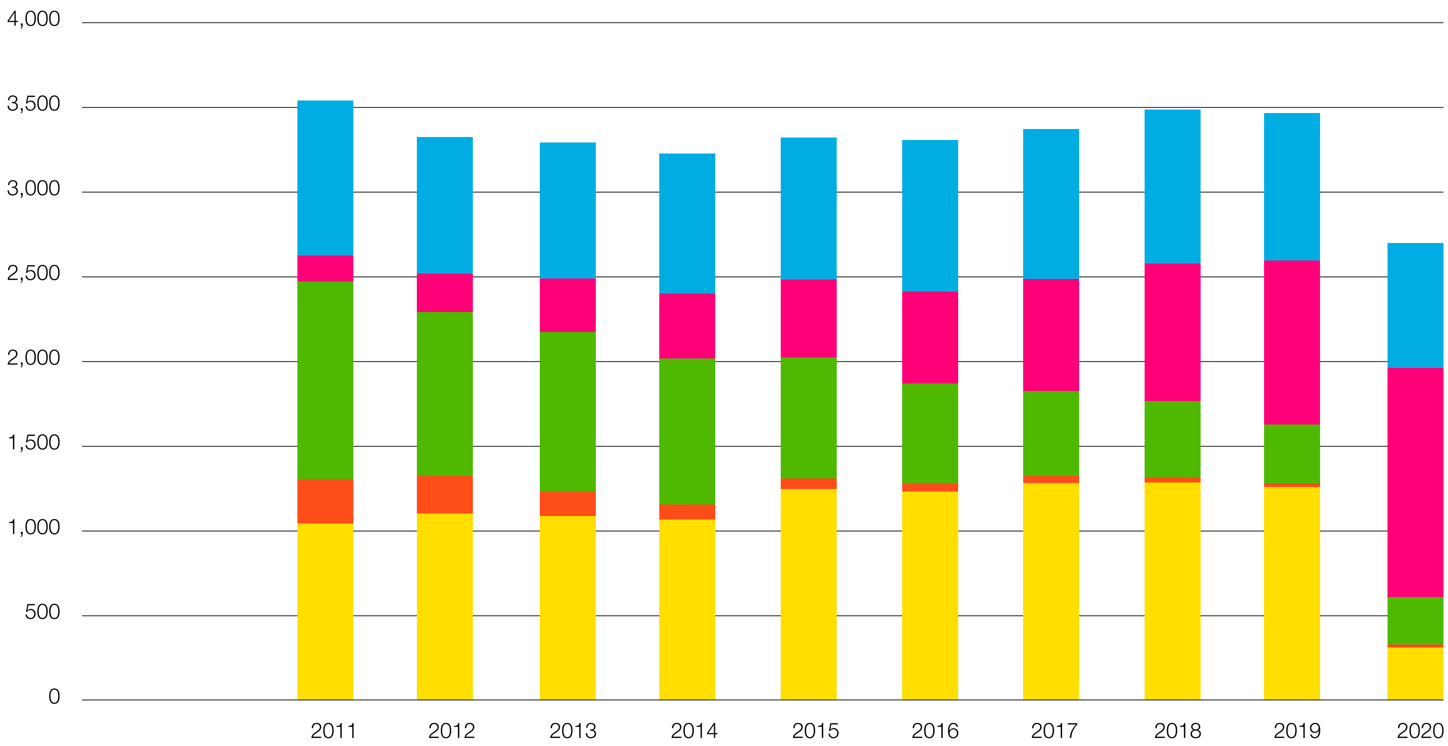
Figures updated since publication of the 2020 Statistical Yearbook.

The evolution of UK film revenues, 2011-2020

Figure 1, which shows aggregate film revenues between 2011 and 2020, highlights the severity of the impact of the COVID-19 pandemic on the UK filmed entertainment market. With the exception of digital video, gross revenues in 2020 were down across all sectors compared with 2011, with the overall market 25% smaller than at the start of the period.

Outwith theatrical entertainment, which was uniquely affected by the pandemic, the data for 2020 shows a continuation of existing trends in the relative values of the market's component sectors. In particular, the shift from the consumption of physical video to digital video has been a constant throughout the period: aggregate physical video revenues decreased by 82% between 2011 and 2020 while digital video revenues increased by 773%.

Figure 1 Gross film revenues, all platforms, 2011-2020

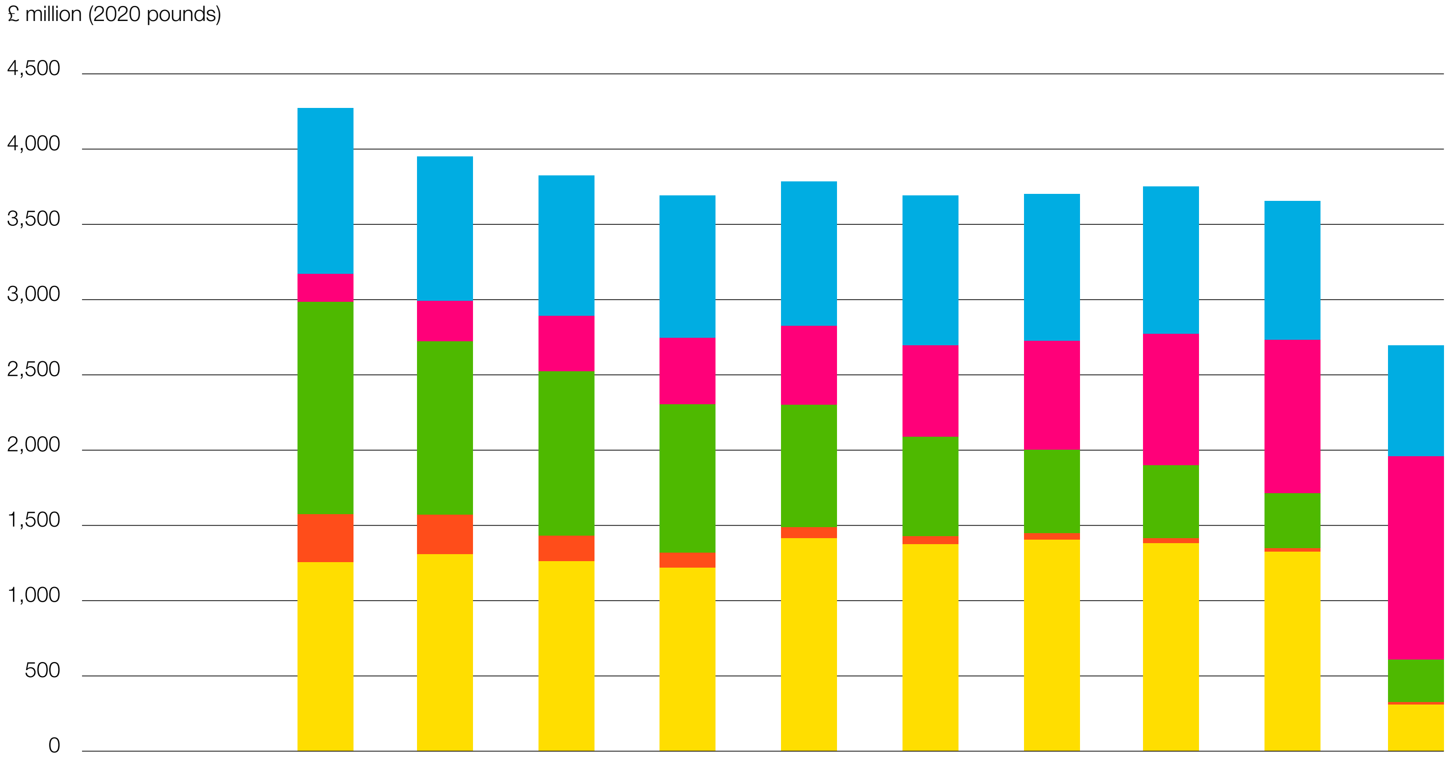


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Film on television	913	806	802	826	840	893	885	911	873	736
Digital video	155	225	316	384	461	543	660	809	966	1,351
Physical video retail	1,165	968	940	861	712	589	503	451	347	233
Physical video rental	262	221	146	88	63	49	40	31	23	17
Theatrical	1,040	1,099	1,083	1,063	1,242	1,228	1,279	1,282	1,254	307
Total	**3,534**	**3,319**	**3,287**	**3,222**	**3,318**	**3,302**	**3,367**	**3,483**	**3,463**	**2,644**

Source: Comscore, BASE, Official Charts Company, Omdia, Ampere, BFI RSU analysis
Notes:
'Film on television' covers terrestrial, pay TV and other multi-channel TV. On-demand television-based services are included within the digital video total.
Figures may not sum to totals due to rounding.
Figures updated since publication of the 2020 Statistical Yearbook.

The revenues shown in Figure 1 are the actual figures; if adjusted for inflation (Figure 2), the decline in the value of the market in 2020 is starker. In inflation-adjusted terms, overall film revenues in 2020 were 29% lower than in 2019, and 39% lower than in 2011.

Figure 2 Gross inflation-adjusted film revenues, all platforms, 2011-2020 (expressed in 2020 pounds)



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Film on television	1,104	960	934	946	958	999	973	981	922	736
Digital video	187	267	367	440	526	607	725	871	1,019	1,351
Physical video retail	1,409	1,152	1,094	986	812	659	553	486	366	233
Physical video rental	317	263	170	101	72	55	44	33	24	17
Theatrical	1,257	1,308	1,261	1,218	1,416	1,374	1,405	1,381	1,324	307
Total	**4,273**	**3,949**	**3,826**	**3,691**	**3,782**	**3,693**	**3,699**	**3,752**	**3,656**	**2,644**

Source: Comscore, BASE, Official Charts Company, Omdia, Ampere, BFI RSU analysis
Notes:
Actual revenues deflated by the UK GDP deflator, which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2021-quarterly-national-accounts.
See notes to Figure 1.
Figures may not sum to totals due to rounding.

The UK film market in the global context

The COVID-19 pandemic created major disruptions to filmed entertainment industries across the world in 2020 and led to significant declines in revenue. Overall, the global filmed entertainment market contracted by 30% between 2019 and 2020, with revenues falling from $74.6 billion to $52.2 billion.

As Table 2 shows, in 2020 the UK had the fourth largest filmed entertainment market in the world after the USA, China and Japan (Table 2). According to Omdia, with revenues of $20.9 billion, the USA accounted for 40% of the global market, with China accounting for 13% ($7 billion), Japan for 6% ($3.3 billion) and the UK for 5% ($2.4 billion).

Table 2 Top 20 countries by filmed entertainment revenues, 2020

Country	US$ million	Market share %
USA	20,926	40.1
China	6,984	13.4
Japan	3,349	6.4
UK	2,382	4.6
Germany	2,306	4.4
France	1,705	3.3
Canada	1,210	2.3
Australia	1,048	2.0
South Korea	1,040	2.0
Brazil	944	1.8
Mexico	814	1.6
Spain	717	1.4
Italy	685	1.3
India	643	1.2
Russia	597	1.1
Netherlands	579	1.1
Sweden	420	0.8
Poland	416	0.8
Denmark	402	0.8
Switzerland	328	0.6
Rest of the world	*4,683*	*9.0*
Total	**52,179**	**100.0**

Source: Omdia, BFI

Notes:

Information contained in this table was taken from the Cinema Admissions & Box Office Database Q4 2021 and the Home Entertainment Intelligence Database Q4 2021 reports from Omdia.

'Filmed entertainment revenues' here comprise box office receipts, sales of physical video (rental and retail), and digital video revenues (including revenues for purchases/rentals of films through cable/satellite providers). They do not include film-related television revenues.

Figures may not sum to totals due to rounding.

The global filmed entertainment market is expected to rebound strongly from the downturn in 2020, according to Omdia, and grow by 98% by 2025 (Table 3). The USA, China, Japan and the UK are projected to remain the world's top four markets (although the USA will lose significant share, primarily to China).

Countries for which the box office makes up a substantial majority of overall filmed entertainment revenues are predicted to make a particularly strong recovery as COVID-19 restrictions on cinemas ease. Revenues for India, for example, are predicted to increase by 430% by 2025. It should be noted, however, that India's projected growth is also based on forecasts for a significant expansion in home entertainment revenues, which is also the case for new entrants in the top 20 list, Indonesia and Colombia. All three countries' non-theatrical film revenues are expected to grow by at least 250% by 2025. (Denmark and Switzerland, both of which feature in the top 20 list for 2020 are forecast to drop out of the list by 2025.)

Table 3 Top 20 countries by filmed entertainment revenues, forecast for 2025

Country	US$ million	Market share %	% predicted growth 2020-2025
USA	35,465	34.3	69.5
China	16,603	16.1	137.7
Japan	4,855	4.7	45.0
UK	4,520	4.4	89.8
Germany	3,778	3.7	63.8
France	3,664	3.5	114.9
India	3,407	3.3	429.7
South Korea	2,649	2.6	154.6
Mexico	2,439	2.4	199.6
Australia	2,137	2.1	103.9
Brazil	2,068	2.0	119.0
Canada	2,010	1.9	66.2
Spain	1,681	1.6	134.5
Italy	1,521	1.5	122.1
Russia	1,268	1.2	112.6
Netherlands	996	1.0	72.0
Poland	769	0.7	84.7
Indonesia	756	0.7	433.3
Sweden	707	0.7	68.5
Colombia	642	0.6	259.4
Rest of the world	*11,399*	*11.0*	*69.5*
Total	**103,336**	**100.0**	**98.0**

Source: Omdia, BFI
See notes to Table 2.
Figures may not sum to totals due to rounding.

AUDIENCES

FACTS IN FOCUS

Due in part to the COVID-19 pandemic, the percentage of UK adults who watched a film on a Subscription Video on Demand (SVoD) service increased to 63%, making it the most common method of film viewing in 2020.

- Ninety-two percent of UK adults have watched a film in the last 12 months. Amongst these film viewers:
  - Sixty-three percent watched a film on SVoD
  - Fifty-eight percent watched a film on TV
  - Thirty-two percent watched a film on DVD/Blu-ray
  - Thirty-one percent watched a film at the cinema.
- Thirty-four percent of cinemagoers in 2020 were aged 15-34, 19% were aged 55+.
- Adults aged 55+ make up over half of the total viewing audience for film on TV.
- Forty-three percent of the total adult SVoD audience are aged 18-34.

Audiences

Availability of UK cinema audience data in 2020

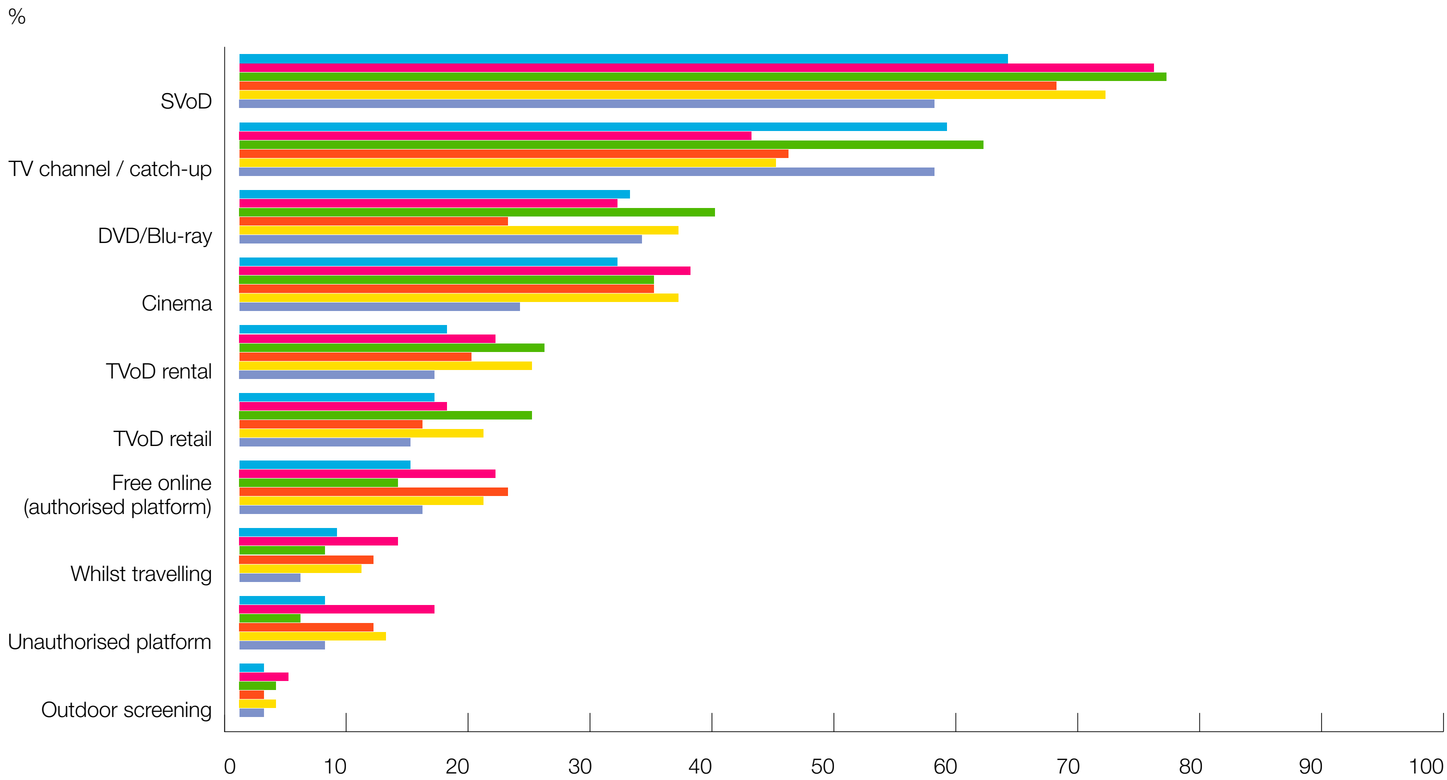
The COVID-19 pandemic created a particularly challenging year for cinemas in 2020 with closures, reduced capacity openings and the postponement or cancellation of major releases. There were challenges too for the collection of data on cinema-going activity in the year. Traditionally, the industry's principal method of measuring the demographic profile of cinema audiences has involved in-person interviews. However, the introduction of social distancing rules meant this was not feasible for most of the year. While there was a shift to alternative data gathering methods, such as online surveys, the interruption in the collection of data coupled with the reduced number of films surveyed means the title-specific cinema audience data for the year are not robust. These data, which allow for the analysis of the audience for UK films and audience preferences by demographic, are not included in the current chapter. We do include data on the overall cinema-going audience, which are viewed as more reliable, although coverage might not always include the full calendar year.

Audiences for film in the UK by method of viewing

When asked whether they had viewed a film by any means in the previous 12 months (November 2019-October 2020), 92% of the UK adult population (aged 16+) responded positively. Amongst all adults (Figure 1) the largest reach (63%) was for films shown on subscription video-on-demand (SVoD). This was also the case for 16-24 year olds (75%), adults with a child under 18 (76%), BAME adults (67%), LGBTQ+ adults (71%), and adults with a disability (57%). For respondents in the latter group watching film on television was equally popular.

Although the 12 months covered by this survey include a period before the onset of UK-wide COVID-19 restrictions, the data reflect the impact of the pandemic on the theatrical sector. For all adults reach for films at the cinema was 31%, compared with 55% in the 12-month period covered in the 2020 Statistical Yearbook.

Figure 1 Audiences for film in the UK, top 10 methods of viewing



	SVoD	TV channel catch-up	DVD/ Blu-ray	Cinema	TVoD rental	TVoD retail	Free online (authorised platform)	Whilst travelling	Unauthorised platform	Outdoor screening
Adults	63	58	32	31	17	16	14	8	7	2
Age 16-24	75	42	31	37	21	17	21	13	16	4
Adults with child under 18	76	61	39	34	25	24	13	7	5	3
BAME	67	45	22	34	19	15	22	11	11	2
LGBTQ+	71	44	36	36	24	20	20	10	12	3
Disability	57	57	33	23	16	14	15	5	7	2

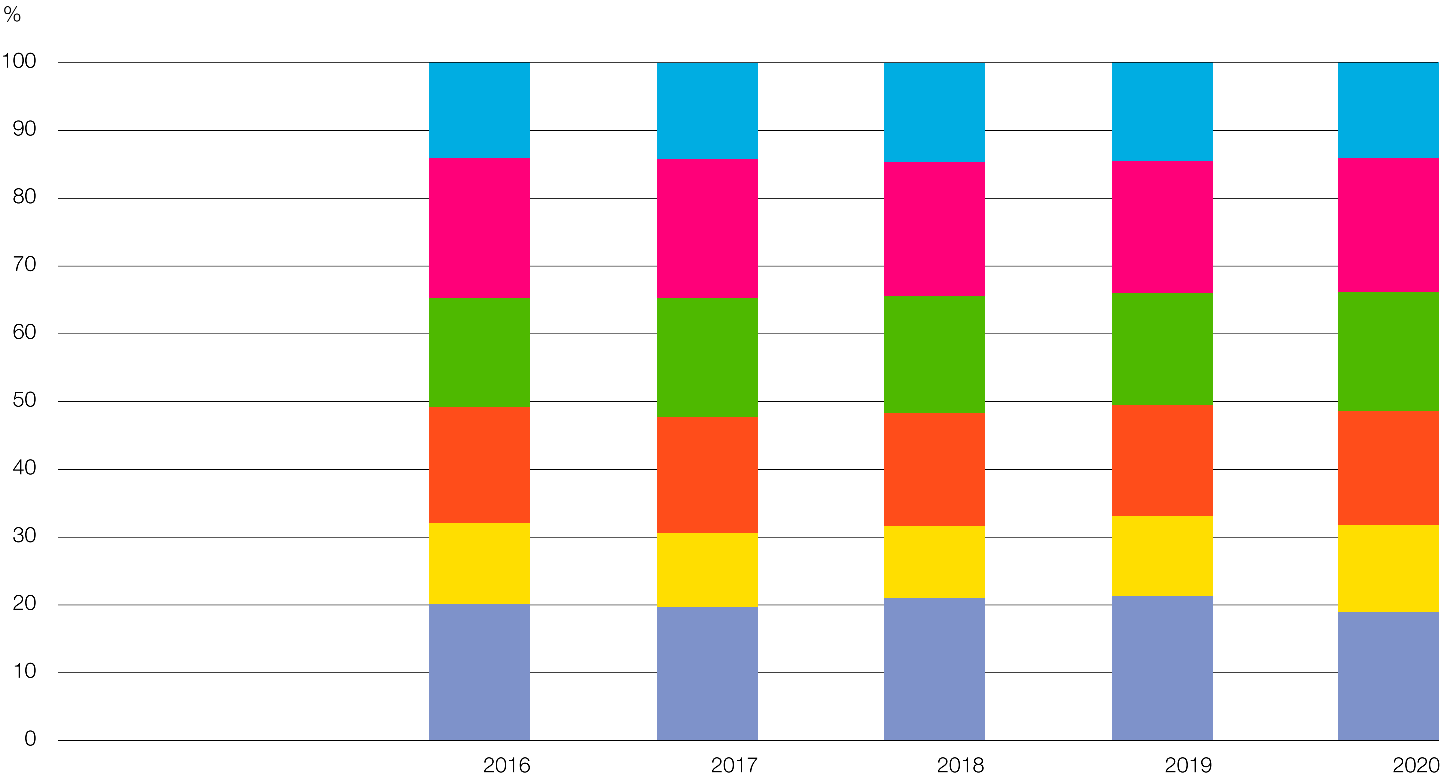
Source: BFI/YouGov Screen Engagement Audience Tracker, November 2020, Base n=11,570 UK adults, 16yrs+
Q: In which of the following venues or ways have you watched a film in the past 12 months?

Cinema audience by age

Figure 2 shows the trends by age for cinema-goers between 2016 and 2020. The data here are based on respondents to the Cinema Advertising Association's Film Monitor survey who reported going to the cinema at least once in the past 12 months, and differ from those in previous Yearbooks, which were based on weighted averages of the audience profiles for all releases reported in the survey. (The 2020 figure here covers the 12-month reach from 2019 Q4-2020 Q3.)

The relative proportion of admissions for each category has been broadly similar throughout the period, with 15-24 year olds and those aged 55+ representing the two largest cinema-going age groups each year. Interestingly, the oldest age group had the largest year-on-year decline in cinema attendance, dropping from 21% of the overall audience in 2019 to 19% in 2020. The Film Distributors' Association's Entertainment & Attitudes Tracker indicates that older audiences were the most reluctant to return to cinemas in the latter part of 2020. It is likely, therefore, that the actual drop-off in attendances for this group in 2020 may be higher as the survey period includes a significant portion of pre-pandemic activity.

Figure 2 Age distribution of cinema goers, 2016-2020



	2016	2017	2018	2019	2020
Age 7-14	14.1	14.2	14.8	14.5	14.2
Age 15-24	20.7	20.5	19.8	19.5	19.7
Age 25-34	16.1	17.5	17.3	16.6	17.5
Age 35-44	17.0	17.1	16.6	16.3	16.8
Age 45-54	12.0	11.0	10.7	11.9	12.9
Age 55+	20.1	19.6	20.9	21.2	18.9

Source: Cinema Advertising Association (CAA) Film Monitor, 2016-2020
Notes:
'Cinema goers' are here defined as any individual who has been to the cinema at least once in the year.
These data are not comparable with those in previous Yearbooks.

Cinema audience by gender and socio-economic status

The gender split of the cinema-going audience directly mirrored the overall UK population in 2020, according to the CAA Film Monitor, at 49% male: 51% female. Table 1 shows, however, that this was not consistent by age group. While cinema audiences drawn from the 15-24 and 25-44 age groups skewed towards males (52%), amongst audiences aged 35 or over females (54%) outweighed males.

The average cinema audience generally attracts a higher proportion of individuals from the higher socio-economic grades in all age groups compared with their representation in the UK population as a whole. In 2020, this was most marked amongst the 35+ audience, 67% of which was comprised of ABC1 cinema-goers, compared with 54% in the general population. Audiences drawn from the 15-24 year age group, however, were more evenly split in terms of social grade with ABC1 cinema-goers under-indexing (51%) and C2DE cinema-goers over-indexing (49%) compared with their representation in the general population.

Table 1 Cinema audiences by age and gender/social grade, 2020

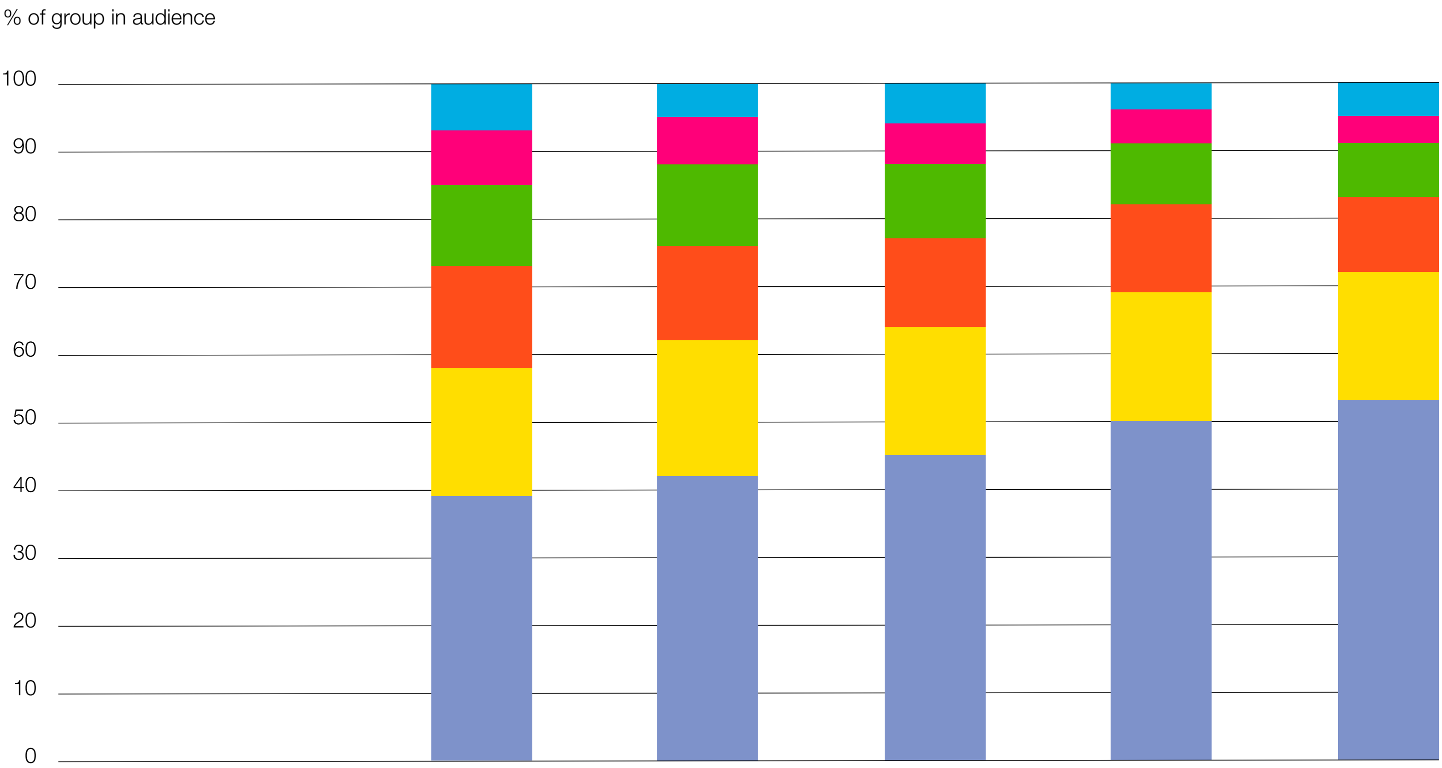
	Cinema audiences					UK population
	Age 7-14	Age 15-24	Age 25-44	Age 35+	All 7+	7+
	%	%	%	%	%	%
Males	50	52	52	46	49	49
Females	50	48	48	54	51	51
ABC1	56	51	61	67	61	54
C2DE	44	49	39	33	39	46

Source: CAA Film Monitor, 2020

Audiences for film on television

The age distribution of audiences for films watched on television differs markedly to that for cinema audiences. Generally speaking, individuals who watch films on television tend to be in the older age groups, with more than half the audience aged 45 or over. The data suggests that the television audience is growing older through time (and at a faster rate than within the UK population as a whole). As Figure 5 shows, the proportion of older (45+) viewers increased by 24% between 2016 and 2020, while the share of the youngest (7-24) viewers in the data decreased by 40%.

Figure 3 Age distribution of television audiences for film, all channels, 2016-2020



	2016	2017	2018	2019	2020
Age 7-15	7	6	6	5	5
Age 16-24	8	7	6	5	4
Age 25-34	12	12	11	9	8
Age 35-44	15	14	13	13	11
Age 45-54	19	20	19	19	19
Age 55+	39	42	45	50	53

Source: BARB/TechEdge, All individuals 7yrs+, Total TV, filtered on 'film' and 'TV film' genre
Note: Television audience figures are based on BARB data and cover all programmes classified by BARB as 'film' or 'TV film'.

Film preferences by age

Tables 2-5 show the five films with the strongest profiles for four separate age groups (as a % of all individuals aged 7+), for all films transmitted on television in 2020. Comparative preferences for theatrical audiences are not included this year due to issues with the collection of in-cinema audience data resulting from the COVID-19 pandemic. These tables do not represent the films seen by the largest number of viewers within each age group but rather the films whose audience, regardless of size, delivered the highest proportion of its audience from each age group.

Animations and family films such as *The Angry Birds Movie 2*, *The Boss Baby* and *Paddington 2* were of particular appeal to the 7-14 year old age group (Table 2). The 2020 Roald Dahl adaptation, *The Witches*, which missed a theatrical release in the UK due to the pandemic, was the highest indexing film for younger viewers (50%) and is one of two UK films in the top five titles with the strongest profile for this age group. Animations such as *Ice Age 2: The Meltdown*, which are typically broadcast in the afternoon, also featured in the top five indexing films on television for 16-34 year olds in 2020, alongside post-watershed comedies such as *The Hangover Part III* (Table 3). Two of the top five indexing titles were the UK independent films *The Inbetweeners Movie* and *The Inbetweeners 2*.

The only age category not to feature a UK film in its top five indexing titles on television in 2020 was the 35-54 year old group. The films with the highest audience share of these viewers were comedy, drama and action titles with *Happy Gilmore* and *Meet the Fockers* the top two indexing films (Table 4). The top five indexing titles for the oldest age category (55+) covered the widest range of genres with two war films, a western, a musical and a drama in the list (Table 5). Generally, the titles are older than those from the other categories and include the greatest number of UK films. Three of the five titles were UK productions, all of which were independent titles. The top indexing titles for this demographic were the most skewed, with viewers aged 55+ making up over 90% of the audience for all of their top five titles and 95% of the audience for their top indexing film, *The Cruel Sea*.

Table 2 Films on television with a substantial above-average audience profile in the 7-15 age group, 2020

Film	TV channel	% of audience in group
The Witches (2020)*	Sky Cinema Family	50
The Angry Birds Movie 2	Sky Cinema Premiere	41
The Boss Baby	CBBC	39
Paddington 2*	CBBC	35
The LEGO Batman Movie	ITV2	29
7-15 yrs average profile of all films on TV		5
7-15 yrs in total TV audience		4

Source: BARB/TechEdge
Notes:
Television audiences are originated from BARB data and cover all films classified by BARB as 'films' and 'TV films' and which achieved an average individual transmission audience of over 250,000 individuals aged 7+. Where a film has been screened more than once during the year the showing with the highest % profile for that group is included.
UK films are marked with an asterisk.

Table 3 Films on television with a substantial above-average audience profile in the 16-34 age group, 2020

Film	TV channel	% of audience in group
The Hangover Part III	ITV2	57
The Inbetweeners Movie*	E4	51
Ice Age 2: The Meltdown	E4	46
The Inbetweeners 2*	E4	46
Hotel Transylvania 2	ITV2	41
16-34 yrs average profile of all films on TV		11
16-34 yrs in total TV audience		11

Source: BARB/TechEdge
See notes to Table 2.

Table 4 Films on television with a substantial above-average audience profile in the 35-54 age group, 2020

Film	TV channel	% of audience in group
Happy Gilmore	Sky One	70
Meet the Fockers	Sky One	62
Once Upon a Time... in Hollywood	Sky Cinema Premiere	61
Hansel & Gretel: Witch Hunters	Channel 5	58
Hidden Figures	Film4	58
35-54 yrs average profile of all films on TV		29
35-54 yrs in total TV audience		26

Source: BARB/TechEdge
See notes to Table 2.

Table 5 Films on television with a substantial above-average audience profile in the 55+ age group, 2020

Film	TV channel	% of audience in group
The Cruel Sea*	BBC Two	95
Open Range	5ACTION	93
High Society	BBC Four	92
Brooklyn*	BBC Four	92
In Which We Serve*	BBC Two	92
55+ yrs average profile of all films on TV		53
55+ yrs in total TV audience		60

Source: BARB/TechEdge
See notes to Table 2.

Film preferences by gender

Tables 6 and 7 show the five films with the highest audience profile by gender for all films shown on television during 2020. The five films with the largest female audience share were all musicals, one of which was an animation (Table 6). All five titles featured strong female protagonists. Conversely, the films with the largest male audience share were all action-driven films with only *Atomic Blonde* having a female lead character (Table 7).

The top indexing films for males were slightly more skewed than those for female viewers. Over eight out of 10 viewers for *The Dead Pool* were male while females made up just under seven in 10 viewers for *The Greatest Showman*. Two of the top female skewing titles were UK films, both of which were studio-backed productions.

Table 6 Films on television with a substantial above-average audience profile of female viewers (age 7+), 2020

Film	TV channel	% of audience in group
The Greatest Showman	Channel 4	68
Mamma Mia! Here We Go Again*	ITV	67
The Sound of Music	BBC One	64
Beauty and the Beast (2017)*	BBC One	60
Moana	BBC One	60
Females (7+ yrs) average profile of all films on TV		50
Females (7+ yrs) in total TV audience		54

Source: BARB/TechEdge
See notes to Table 2.

Table 7 Films on television with a substantial above-average audience profile of male viewers (age 7+), 2020

Film	TV channel	% of audience in group
The Dead Pool	5ACTION	82
Atomic Blonde	Film4	79
The Battle of the Bulge	ITV4	78
Rambo: First Blood	ITV4	77
Cowboys & Aliens	Film4	76
Males (7+ yrs) average profile of all films on TV		50
Males (7+ yrs) in total TV audience		46

Source: BARB/TechEdge
See notes to Table 2.

Film preferences by socio-economic group

Tables 8 and 9 show the five titles with the highest audience profile by socio-economic group for all films shown on television in 2020. There is a marked difference in the social profile of the overall audience for film on television compared with the cinema audience; ABC1 viewers make up 43% of the television audience for film compared with 61% of the in-cinema audience.

UK films shown on television attracted high proportions of ABC1 viewers, with four of the top five indexing titles amongst this social group being UK qualifying productions, all of which were UK independent titles. There were no UK films in the top five indexing titles amongst C2DE audiences. ABC1 audiences showed a preference for drama, thriller and musical titles, while films with the strongest C2DE profile were action or comedy titles.

Table 8 Films on television with a substantial above-average audience profile of ABC1 viewers (age 7+), 2020

Film	TV channel	% of audience in group
Downton Abbey*	Sky Cinema Premiere	79
The Ipcress File (1965)*	BBC Four	79
Emma (1996)*	BBC Four	77
La La Land (2016)	BBC Two	76
Oranges and Sunshine (2010)*	BBC Two	73
ABC1 (7+ yrs) average profile of all films on TV		43
ABC1 (7+ yrs) in total TV audience		47

Source: BARB/TechEdge
Notes:
See notes to Table 2

Table 9 Films on television with a substantial above-average audience profile of C2DE viewers (age 7+), 2020

Film	TV channel	% of audience in group
Death Warrant (1990)	5ACTION	88
Delta Force 2: The Colombian Connection (1990)	5ACTION	88
Missing In Action (1984)	5ACTION	87
War (2007)	5ACTION	86
Crocodile Dundee (1986)	Film4	86
C2DE (7+ yrs) average profile of all films on TV		57
C2DE (7+ yrs) in total TV audience		53

Source: BARB/TechEdge
Notes:
See notes to Table 2

Film preferences by nation

Tables 10-13 show the five films with the highest % of group in the total audience by nation for all films transmitted on television in 2020.

Viewers in England, who on average constituted 83% of the audience for films on TV, made up 88% of the audience for *Indiana Jones and the Kingdom of the Crystal Skull*. Viewers in Scotland (average 8%) most substantially over-indexed in the audience for UK/USA film *Mission Impossible: Rogue Nation (*29%), viewers in Wales (average 5%) *The Dark Mirror* (20%), and viewers in Northern Ireland (average 5%) *Home Alone* (12%).

Three of the films with the highest audience share for viewers in Wales were UK in origin, two being independent films (*The 39 Steps* and *London Has Fallen*), compared to just one UK qualifying film for viewers in England (independent film *Darkest Hour*).

Table 10 Films on television with a substantial above-average audience profile of viewers in England (age 7+), 2020

Film	TV channel	% of audience in group
Indiana Jones and the Kingdom of the Crystal Skull	BBC One	88
Grease	BBC One	87
Darkest Hour*	BBC One	85
Sully	BBC One	84
Spider-Man: Homecoming	BBC One	84
England (7+ yrs) average profile of all films on TV		83
England (7+ yrs) in total TV audience		83

Source: BARB/TechEdge
See notes to Table 2.

Table 11 Films on television with a substantial above-average audience profile of viewers in Scotland (age 7+), 2020

Film	TV channel	% of audience in group
Mission: Impossible - Rogue Nation*	Film4	29
Logan	Film4	27
The Mummy (2017)*	Channel 5	27
The Wolverine	Film4	26
The LEGO Batman Movie	ITV2	26
Scotland (7+ yrs) average profile of all films on TV		8
Scotland (7+ yrs) in total TV audience		9

Source: BARB/TechEdge
See notes to Table 2.

Table 12 Films on television with a substantial above-average audience profile of viewers in Wales (age 7+), 2020

Film	TV channel	% of audience in group
The Dark Mirror	BBC Two	20
Goosebumps	ITV2	18
The 39 Steps (1935)*	BBC Two	17
London Has Fallen*	5STAR	16
Nanny McPhee and the Big Bang*	ITV2	15
Wales (7+ yrs) average profile of all films on TV		5
Wales (7+ yrs) in total TV audience		5

Source: BARB/TechEdge
See notes to Table 2.

Table 13 Films on television with a substantial above-average audience profile of viewers in Northern Ireland (age 7+), 2020

Film	TV channel	% of audience in group
Home Alone	Film4	12
Paddington*	Film4	12
Die Hard	Sky Cinema Drama & Romance	12
Fatal Getaway	Channel 5	11
Slumdog Millionaire*	Channel 4	10
Northern Ireland (7+ yrs) average profile of all films on TV		5
Northern Ireland (7+ yrs) in total TV audience		3

Source: BARB/TechEdge
See notes to Table 2.

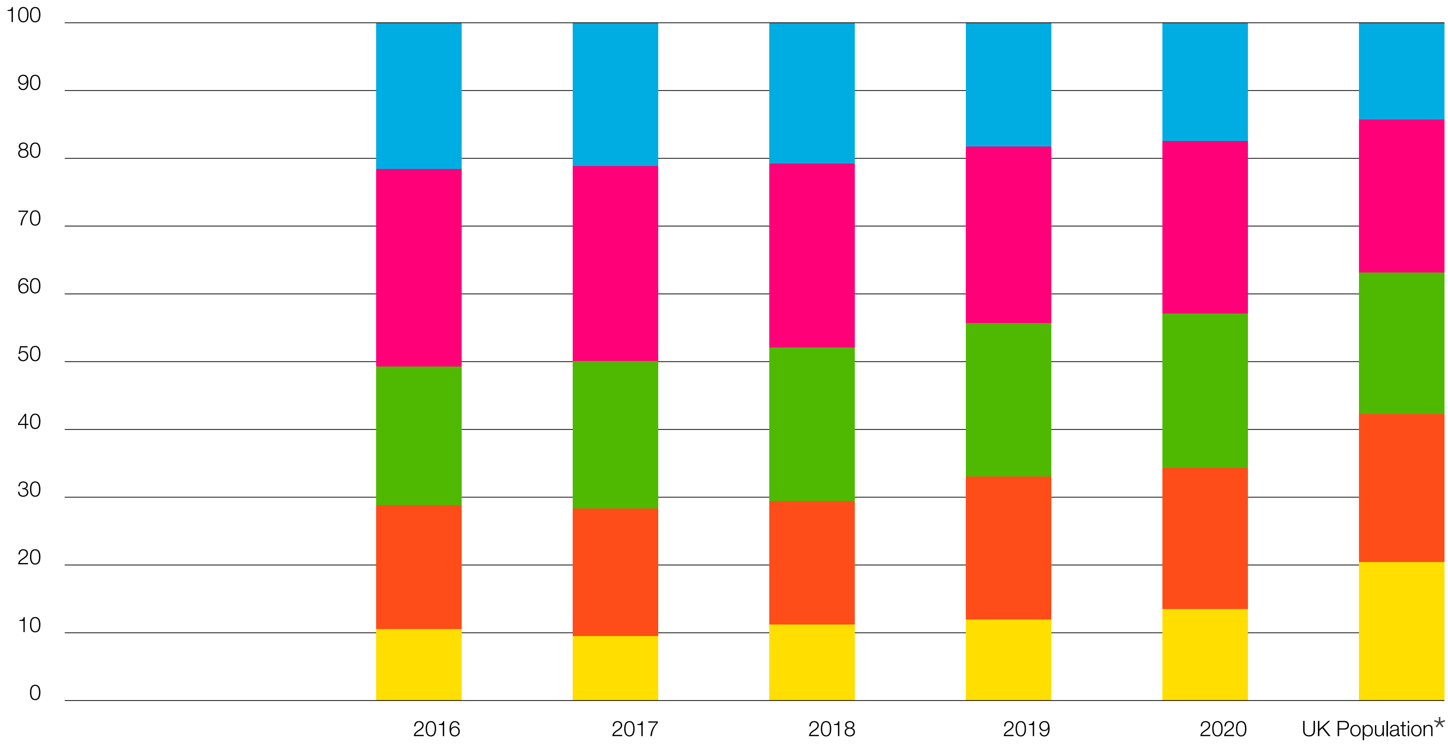
Subscription Video on Demand (SVoD)

The rising adoption of SVoD services in the UK in recent years surged significantly in 2020 because of the COVID-19 pandemic. By Quarter 3, 2020, 17 million households had access to one or more of these services, up from just under 14 million households in Q3, 2019 (see the Film on digital video chapter).

Figure 4 shows that as the take-up of SVoD services has increased, the age profile of SVoD users has moved to be more representative of the UK population. In 2020, users aged 18-34 made up 43% of the SVoD audience compared with 51% in 2016. However, users still skew young in comparison with the general population where 18-34 year olds account for 37% of the total. There was a significant year-on-year increase in the share of older users in 2020, with 55-64 year olds increasing their representation from 12% of the total audience in 2019 to 13.5%, a rise of 13%.

In terms of socio-economic status, the overall SVoD audience skews more affluent than the general population. Whilst there was a gradual decrease in the difference between 2016 and 2019, in 2020 the share for ABC1 users increased from 57.5% to 61%, over-indexing by seven percentage points compared with the general population. The gender balance has been close to evenly split since 2016, and is not significantly different from the UK population as a whole.

Figure 4 UK SVoD audience profile by age, 2016-2020



	2016	2017	2018	2019	2020	UK Population*
Age 18-24	21.7	21.2	20.8	18.4	17.4	14.3
Age 25-34	29.1	28.7	27.1	26	25.5	22.6
Age 35-44	20.5	21.8	22.7	22.7	22.8	20.9
Age 45-54	18.3	18.8	18.2	21.1	20.8	21.8
Age 55-64	10.5	9.5	11.2	11.9	13.5	20.4
Male	49.9	51.4	50.1	49.5	49.4	49.9
ABC1	62.6	61	59.7	57.5	61.2	54.4

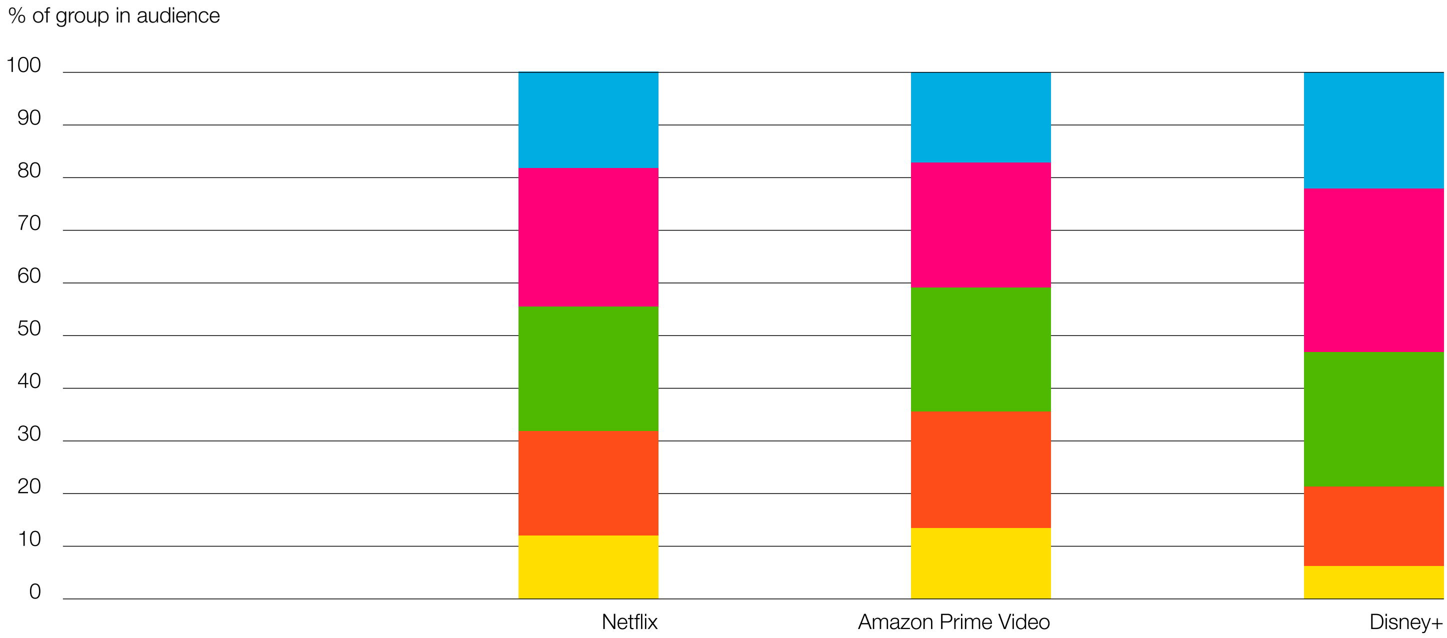
Source: Ampere Analysis, Consumer Surveys 2016-2020, UK adults (18-64). Base: 2016 (794), 2017 (2,188), 2018 (2,474), 2019 (2,909), 2020 (3,112)
Notes:
This is the profile of all users, not just those that watch film.
* UK population based on sample breakdown weighted to represent 18-64 year olds.

User profile of the top three SVoD services

The three most popular subscription streaming services in the UK in 2020 were Netflix, Amazon Prime Video and Disney+. (Disney+ launched in March 2020 and quickly replaced NOW TV as the UK's third most popular SVoD provider. Information on reach for these services is shown in the Film on digital video chapter.)

The profile of users (18-64) is broadly similar for Netflix and Amazon Prime Video, but there are notable differences with Disney+ (Figure 5). While all three services skew young compared with the UK population, Disney+ has a younger profile with 53% of its audience aged under 35 compared with 45% for Netflix and 41% for Amazon Prime Video. The Disney+ audience also skews more female than the other two providers (57% compared with 52.5% for Netflix and 52% for Amazon Prime Video). All three audiences skew more affluent than the general population.

Figure 5 User profile of the top three SVoD services in the UK by age, 2020



	Netflix	Amazon Prime Video	Disney+
Age 18-24	18.3	17.1	22.1
Age 25-34	26.3	23.8	31.0
Age 35-44	23.6	23.5	25.6
Age 45-54	19.9	22.2	15.1
Age 55-64	12.0	13.4	6.2
Male	47.5	48.2	43.3
ABC1	60.5	63.8	59.7

Source: Ampere Analysis, Consumer Survey 2020, UK adults (18-64)
Note: This is the profile of all users, not those that watch film.

Film preferences on the top three SVoD services

Tables 14-20 show the five titles with the highest profile by age, gender and socio-economic status (as a % of all adults 16yrs+) for films available to stream on Netflix, Amazon Prime Video and Disney+ in 2020. The tables do not represent the films seen by the largest number of viewers within a particular demographic, but rather the films whose audience, regardless of size, delivered the highest proportion of its audience from each group.

The films with the strongest profile in the 16-34 age group (Table 14) are romance and fantasy films such as *Sleeping Beauty*, with only one film not having a female lead (*Star Wars: The Phantom Menace*). The 35-54 age group (Table 15) has similarities with the younger age group, also featuring animated family films (including top indexing film *The Voyages of Young Dolittle*) and a Star Wars prequel (*Attack of the Clones*), along with two Marvel superhero movies (*Captain Marvel,* and *Captain America: Civil War*). The inclusion of family films in this age group suggests parents watching films with their children, and in the case of *The Voyages of Young Dolittle*, specifically mothers as it also has a substantial above-average audience profile for female viewers.

The Nightingale, a revenge thriller set in Australia, has the largest audience share for the 55+ age group (Table 16), with other films ranging from horror (*The Strangers: Prey at Night*) to drama (*The Healer*).

Table 14 Films on selected SVoD providers with a substantial above-average audience profile in the 16-34 age group, 2020

Title	SVoD provider	% of audience in group
Sleeping Beauty (1959)	Disney+	87
Mulan (1998)	Disney+	84
Star Wars: The Phantom Menace	Disney+	82
To All the Boys I've Loved Before	Netflix	81
Tangled	Disney+	80
16-34 yrs average profile of all films on SVoD		37

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations

Table 15 Films on selected SVoD providers with a substantial above-average audience profile in the 35-54 age group, 2020

Title	SVoD provider	% of audience in group
The Voyages of Young Doctor Dolittle	Amazon Prime Video	96
Dumbo (1941)	Disney+	74
Captain Marvel	Disney+	72
Star Wars: Attack of the Clones	Disney+	72
Captain America: Civil War	Disney+	70
35-54 yrs average profile of all films on SVoD		37

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations

Table 16 Films on selected SVoD providers with a substantial above-average audience profile in the 55+ age group, 2020

Title	SVoD provider	% of audience in group
The Nightingale	Netflix	72
The Strangers: Prey at Night*	Netflix	72
Peppermint	Netflix	64
Jack Reacher	Netflix	63
The Healer	Netflix	61
55 yrs+ average profile of all films on SVoD		26

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations
Note: UK films are marked with an asterisk.

Differences in preference by gender for films streamed through SVoD services broadly mirror those for audiences of films shown on television (Tables 17 and 18). Films on SVoD attracting a predominantly female audience include romances and family friendly titles while the top male skewed films include action-orientated titles and comedies.

Table 17 Films on selected SVoD providers with a substantial above-average audience profile of female (16+) viewers, 2020

Title	SVoD provider	% of audience in group
Sleeping Beauty (1959)	Disney+	97
The Voyages of Young Doctor Dolittle	Amazon Prime Video	95
Mary Poppins Returns*	Disney+	90
The Kissing Booth	Netflix	89
Dumbo (1941)	Disney+	88
Female (16+) average profile of all films on SVoD		55

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations
Note: UK films are marked with an asterisk.

Table 18 Films on selected SVoD providers with a substantial above-average audience profile of male (16+) viewers, 2020

Title	SVOD provider	% of audience in group
The Strangers: Prey at Night*	Netflix	77
Borat Subsequent Moviefilm	Amazon Prime Video	76
Rampage	Netflix	73
Hellboy (2019)*	Netflix	72
Star Wars: The Phantom Menace	Disney+	72
Male (16+) average profile of all films on SVoD		45

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations
Note: UK films are marked with an asterisk.

Comedy-drama *Late Night* is the film with the greatest ABC1 profile viewed on selected SVoD services (Table 19), with the other titles including a play adaptation (*Ma Rainey's Black Bottom*), a family film (*Klaus*) and sci-fi blockbusters (*Guardians of the Galaxy: Vol. 2* and *Captain America: Civil War*). While the titles that over-index the most for C2DE viewers also feature family films and science fiction (Table 20), they are films that are more accessible to younger viewers, including *Star Wars: The Phantom Menace* and *Minions*.

Table 19 Films on selected SVoD providers with a substantial above-average audience profile of ABC1 (16+) viewers, 2020

Title	SVoD provider	% of audience in group
Late Night	Amazon Prime Video	92
Klaus	Netflix	87
Guardians of the Galaxy: Vol. 2	Disney+	86
Ma Rainey's Black Bottom	Netflix	83
Captain America: Civil War	Disney+	82
ABC1 (16+) average profile of all films on SVoD		56

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations

Table 20 Films on selected SVoD providers with a substantial above-average audience profile of C2DE (16+) viewers, 2020

Title	SVoD provider	% of audience in group
The Voyages of Young Doctor Dolittle	Amazon Prime Video	96
Sleeping Beauty (1959)	Disney+	85
Star Wars: The Phantom Menace	Disney+	79
Minions	Netflix	77
Incredibles 2	Disney+	77
C2DE (16+) average profile of all films on SVoD		44

Source: TRP Codex, data from fieldwork conducted 2 Jan 2020 - 1 Jan 2021, all adults 16+, all devices, all locations

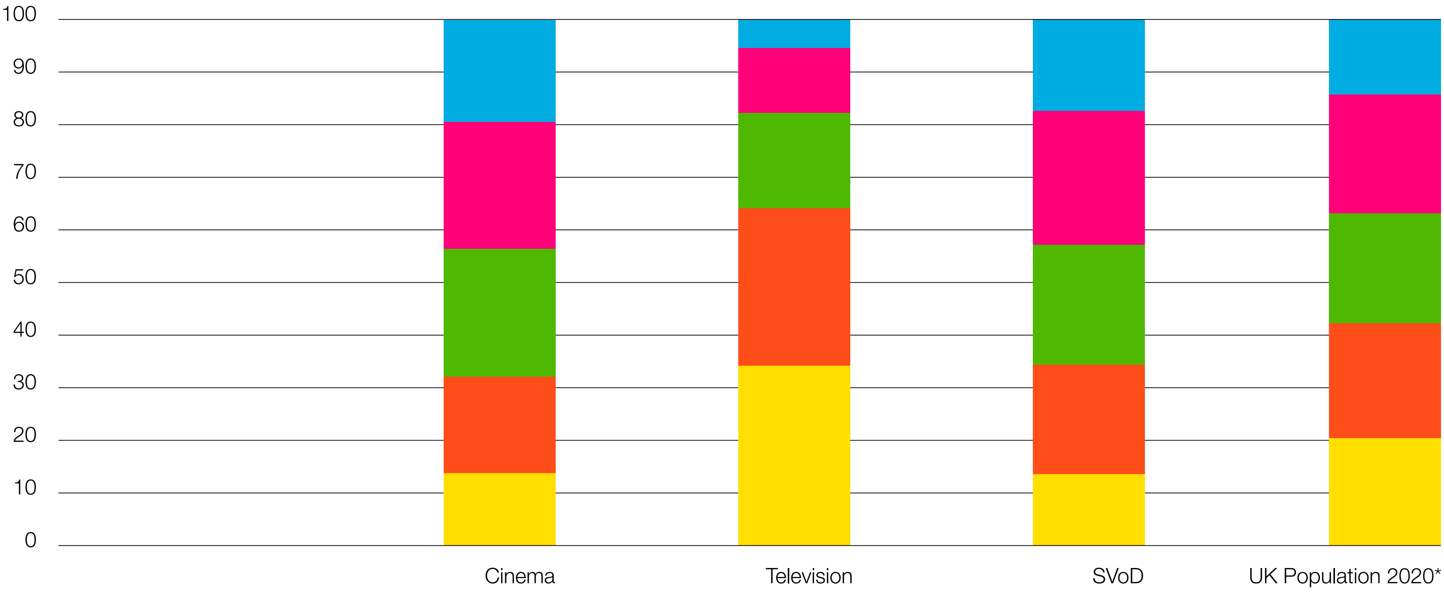
Audience profile comparative analysis

This chapter has focused on comparing the demographic profile of the audience for the three most used platforms that show film as well as the demographic preferences of audiences for films on two of these: television and SVoD. However, due to the different methodologies used to collect the data and different sampling criteria, it is difficult to draw any real comparisons between them. Figure 6 attempts to remove those differences by looking at a common core sample of 18-64 year olds. It should be noted that this is not single source data so we are unable to create overlaps in, for example, those who use all three platforms for watching film. In addition, the data for SVoD services are for all content watched on these services, including high-end television series, so is not exclusively based on a 'film-only' audience.

Audiences for both cinema and SVoD skew young: 43.5% of cinema-goers and 43% of SVoD users are aged between 18 and 34 while 14% of cinema-goers and 13.5% of SVoD users are aged between 55 and 64. In contrast, 64% of the television audience for film is aged between 45 and 64 while only 5.5% are aged between 18 and 24. The similarities between cinema and streaming audiences suggest that viewing film on SVoD platforms is complementary to seeing films in the cinema and thus more likely to compete with watching films on television than with cinema-going.

In terms of gender, all three platforms attract an audience that is not substantially different from the UK population and which splits equally between men and women. In socio-economic terms, the comparative position is similar to age, with cinema and SVoD showing a more upmarket profile compared with that of television which under-represents ABC1 viewers.

Figure 6 Comparative UK audience profiles: cinema, television and SVoD, 2020



	Cinema	Television	SVoD	UK Population 2020*
Age 18-24	19.4	5.5	17.4	14.3
Age 25-34	24.1	12.4	25.5	22.6
Age 35-44	24.3	18.1	22.8	20.9
Age 45-54	18.4	30.0	20.8	21.8
Age 55-64	13.7	34.1	13.5	20.4
Male	48.2	49.4	49.4	49.9
ABC1	64.1	45.8	61.2	54.4

Source: CAA, BARB/Techedge, Ampere Analysis
Notes:
CAA data based on age profile of adults aged 18-64 who report having been to the cinema at least once in the past 12 months.
BARB/TechEdge data filtered on all titles transmitted on all BARB subscribed channels in 2020.
Ampere Analysis Consumer Survey 2020, Audience profile for all UK SVoD services. UK adults (18-64), Base (3,112).
* Based on adults aged 18-64.

SCREEN SECTOR CERTIFICATION

FACTS IN FOCUS

In 2020, 921 projects with a total production value of £4.9 billion were certified as British under the UK's screen sector cultural tests and co-production treaties. The UK spend associated with these projects was £3.7 billion.

- A total of 385 feature films received final certification as British in 2020, an increase from 383 in 2019. Of these, 369 were films which passed the cultural test and 16 were official co-productions.
- The combined production budget of cultural test films with final certification was £2.5 billion (£3.7 billion in 2019); the combined budget of co-productions with final certification was £75 million (£47 million in 2019).
- Thirty films with final certifications had budgets of over £10 million, down from 40 in 2019; 301 films with final certification had budgets of under £2 million, up from 278 in 2019.
- The median budget for cultural test films in 2020 was £0.1 million; the median budget for co-productions was £3.2 million.
- A total of 118 high-end television (HETV) programmes received final certification under the cultural test (135 in 2019), with a combined budget of £1.7 billion (£1.8 billion in 2019).
- A total of 65 animation programmes received final certification under the cultural test (60 in 2019), with a combined budget of £111 million (£125 million in 2019).
- A total of 89 children's television programmes received final certification under the cultural test (84 in 2019), with a combined budget of £103 million (£87 million in 2019).
- A total of 262 video games received final certification (249 in 2019), with a combined budget of £455 million (£1.2 billion in 2019).

Screen sector certification

Qualifying as an official British production

Film

To access UK film tax relief or be eligible for other public support, such as Lottery funding, a film must be certified as British. To qualify as British, a production must pass the cultural test for film (under Schedule 1 of the Films Act 1985) or be certified as an official co-production under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production. The cultural test has been in place since 2007, but was revised in 2014 to bring it in line with the more recent creative sector cultural tests.

The Secretary of State for Digital, Culture, Media and Sport is responsible for approving the issuing of interim and final certificates on the basis of recommendations made by the BFI Certification Unit. Projects seeking qualification under the cultural test may apply for interim certification either during production or when the project is complete, or may apply directly for final certification once the production has been completed and final documents submitted. Projects seeking qualification as official co-productions must apply for interim approval at least four weeks before principal photography begins and for final certification once the project is complete.

To qualify as British under the revised cultural test, films must 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 2020, including *1917, Shaun the Sheep: Farmageddon* and *Star Wars: The Rise of Skywalker.*

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 2020, 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. (The convention is governed by the Council of Europe, so is unaffected by the United Kingdom leaving the European Union.) Films which received final co-production certification in 2020 included *Fanny Lye Deliver'd, Little Joe* and *Sorry We Missed You.*

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 2020, these were with Australia, Brazil, Canada, China, Israel, New Zealand, the Occupied Palestinian Territories and South Africa.

High-end television programmes receiving final certification in 2020 included *Giri/Haji, His Dark Materials Series 1,* and *Sanditon*. Animation and children's television programmes qualifying as officially British in the year included *Bing – Series 4, Horrible Histories – Series 8* and *The Worst Witch – Series 4.*

Video games

In 2014, the UK government extended creative sector tax reliefs to include video games development. To qualify as officially British a video game must pass the relevant cultural test (under Schedules 17 and 18 of the Finance Act 2013). Official co-production treaties do not apply to the video games sector.

Video games awarded final certification in 2020 included *Crackdown 3, Dreams* and *LEGO Jurassic World*.

Difference with Production statistics

The data for individual years in this chapter are not analogous with the statistics in the Production chapter which cover all film production and UK qualifying television and video games production activity by year of production start. This chapter covers only UK qualifying screen sector productions. These projects 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.

Impact of COVID-19 pandemic

Unlike many other chapters of this yearbook, the COVID-19 pandemic has not had a large impact on the data presented in this chapter. This is because final certifications are issued after the completion of production, as such the majority of projects in the data had already completed production before the effects of the COVID-19 pandemic.

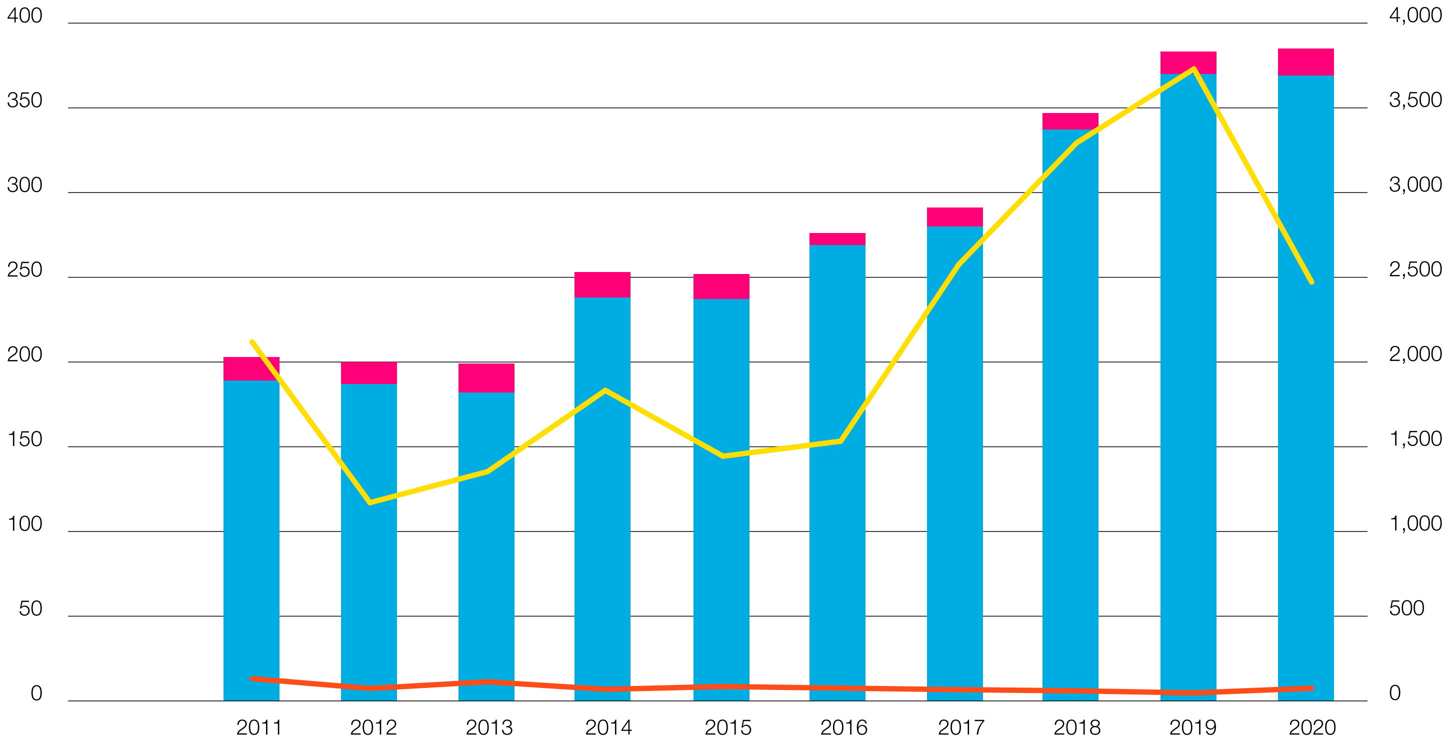
Image: *Little Joe* courtesy of BFI Distribution

Films with final certification, 2011-2020

The number of UK films receiving final certification increased substantially between 2011 and 2020. As Figure 1 shows, the number of finally certified films in 2020 (385) was almost double the total in 2011 (203). There was also an overall upward trend in the production value associated with these films, which rose from £1.2 billion in 2012 to £3.8 billion in 2019, before dropping to £2.5 billion in 2020. The increase, particularly from 2017 to 2019, is due primarily to a rise in the numbers of very high budget studio-backed films qualifying as British.

The numbers and overall budgets of co-productions with final certification remained low throughout the period.

Figure 1 Number and total production budget of films with final certification, 2011-2020



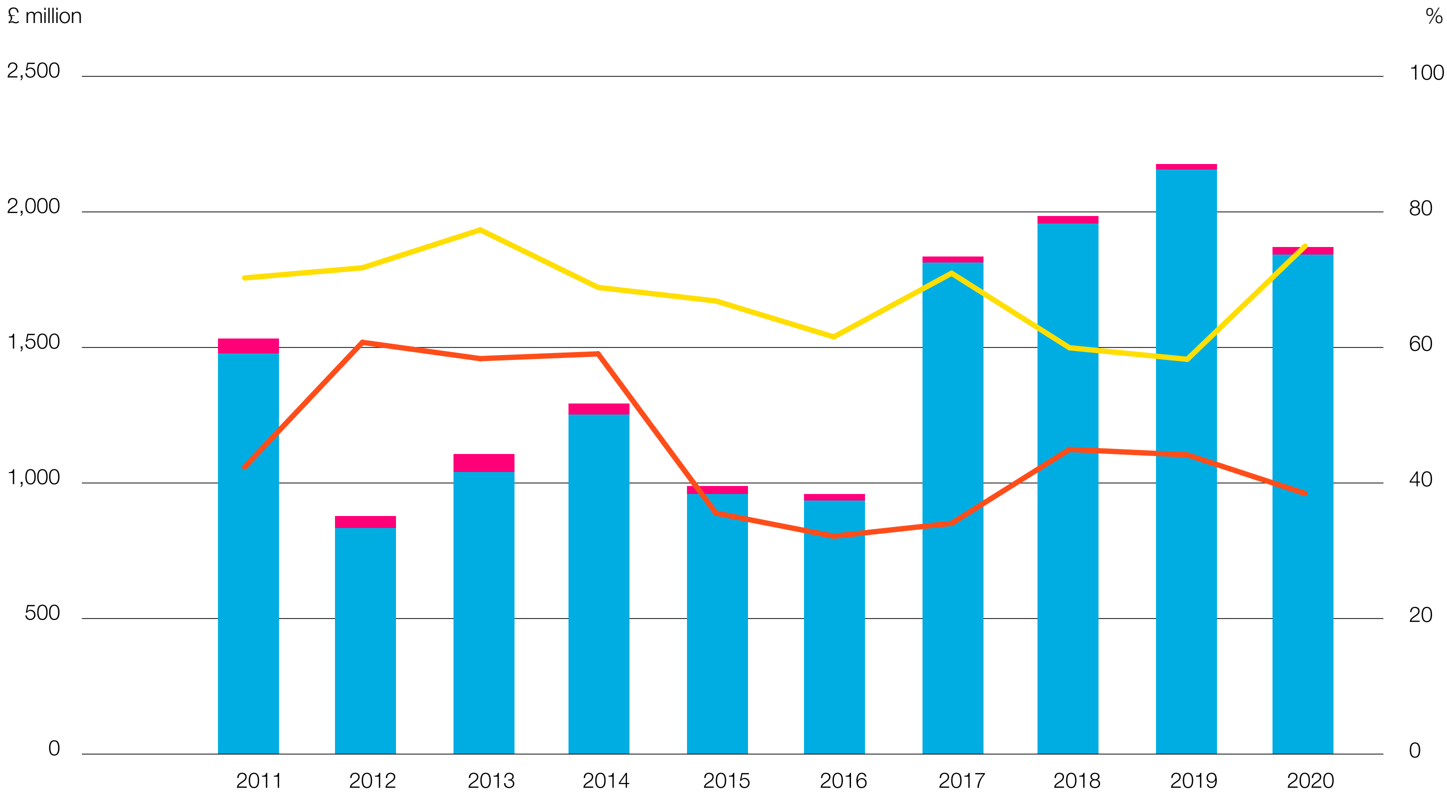
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of final certifications										
Co-production	14	13	17	15	15	7	11	10	13	16
Cultural test	189	187	182	238	237	269	280	337	370	369
Total	**203**	**200**	**199**	**253**	**252**	**276**	**291**	**347**	**383**	**385**
Total production budget (£ million)										
Co-production	131.4	73.5	112.7	68.2	84.6	75.4	66.2	59.4	47.2	74.8
Cultural test	2,118.3	1,169.7	1,353.3	1,832.6	1,443.9	1,532.7	2,573.4	3,291.4	3,729.6	2,471.6
Total	**2,249.7**	**1,243.2**	**1,466.0**	**1,900.8**	**1,528.5**	**1,608.1**	**2,639.5**	**3,350.8**	**3,776.8**	**2,546.4**

Source: DCMS, BFI
Notes:
Total production budget is the sum of production activity in the UK and production activity outside the UK for cultural test films and total investment for co-productions.
Data updated since publication of the 2020 Statistical Yearbook.

Figure 2 shows the levels of UK spend associated with films receiving final certification between 2011 and 2020. (It should be noted that although the latest cultural test amendments allow wider European Economic Area cultural elements for content to be taken into account when a film is applying for certification as British, tax relief is only awarded to expenditure which is used or consumed in the UK.) While the level of overall UK spend has varied in the 10-year period, there was a substantial increase in 2017 and continued upticks in both 2018 and 2019. This was followed by a drop in 2020 though still the third highest ever recorded. The rise in overall UK production value from 2012-2020 is mainly due to the increase in the number of big budget films being certified under the cultural test. In 2020, the UK spend of certified films reached £1.9 billion.

As a share of total production budget, the UK spend of cultural test films between 2013 and 2019 saw a downward trend from a high of 77% in 2013 to a low of 58% in 2019, before increasing to 75% in 2020. The trends for co-productions are more unpredictable due to the small numbers of productions. In 2020, co-productions accounted for only 2% of the overall UK spend of films with final certification, compared with 4% in 2011.

Figure 2 UK spend of films with final certification and UK spend as % of total budget, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK spend (£ million)										
Co-production	55.0	44.3	65.3	40.0	29.7	23.9	22.2	26.4	20.6	28.4
Cultural test	1,478.5	834.2	1,041.2	1,252.8	959.0	936.3	1,813.6	1,958.2	2,156.0	1,842.5
Total	**1,533.5**	**878.5**	**1,106.5**	**1,292.8**	**988.7**	**960.2**	**1,835.8**	**1,984.6**	**2,176.6**	**1,870.8**
UK spend as % of total production budget										
Co-production	41.9	60.3	57.9	58.6	35.1	31.7	33.6	44.5	43.7	38.0
Cultural test	69.8	71.3	76.9	68.4	66.4	61.1	70.5	59.5	57.8	74.5

Source: DCMS, BFI
Notes:
See note to Figure 1.
'UK spend' is the 'value of the production activities in the UK' for cultural test films and 'UK expenditure' for co-productions (bilateral and European Convention). UK spend for co-productions may include some expenditure on UK goods and services which took place outside the UK.
Data updated since publication of the 2020 Statistical Yearbook.

Budget distribution of films with final certification, 2011-2020

Table 1 shows the median budgets of films receiving final certification between 2011 and 2020. Median budgets for cultural test films have been fairly consistent over the majority of the period, ranging between £300,000 and £500,000. It dropped to £100,000 in 2020 mostly due to a large number of short films with lower total budgets receiving final certification in 2020. The median budget for co-productions has been more varied, peaking in 2017 at £5.7 million and with a low of £2.4 million in 2019. This fluctuation is a result of the relatively small volume of co-production activity over the period, as with low numbers the median is more susceptible to the effects of individual budgets.

Table 1 Median budgets of films with final certification, 2011-2020

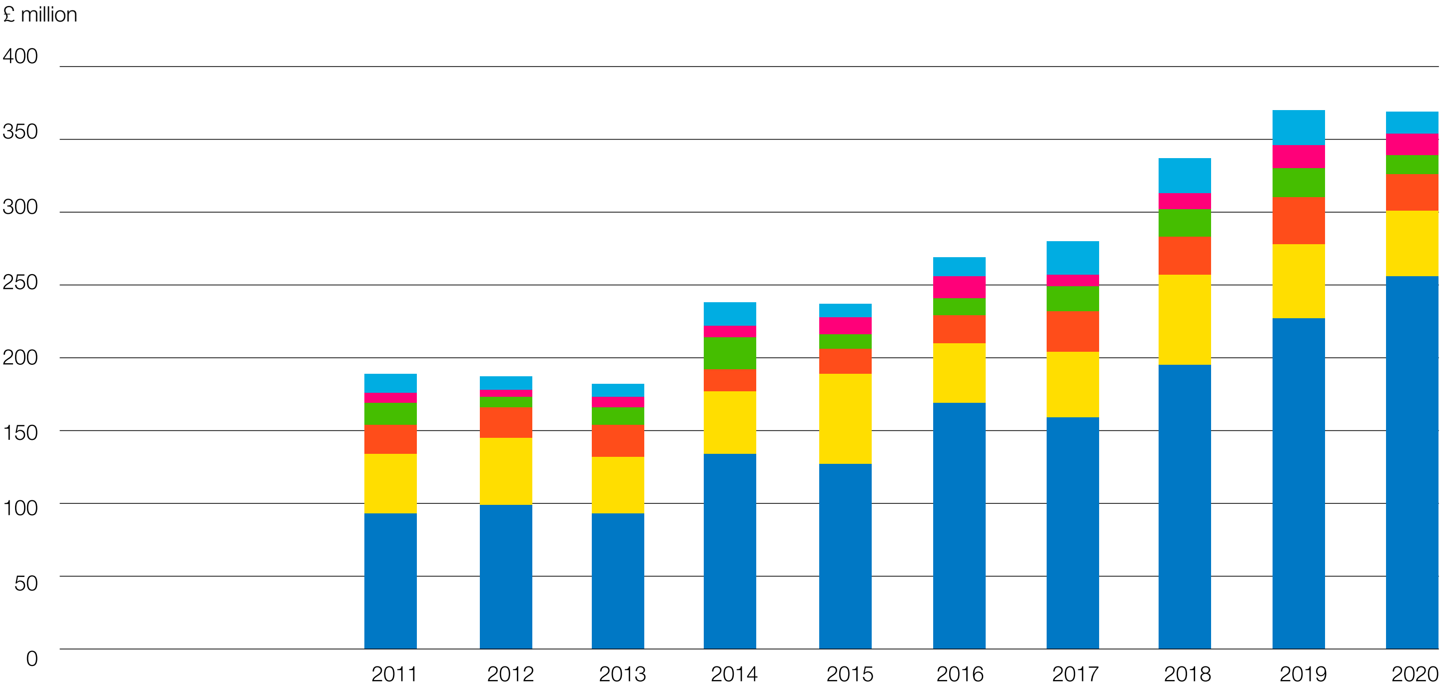
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cultural test (£ million)	0.5	0.4	0.4	0.4	0.4	0.3	0.3	0.3	0.3	0.1
Co-production (£ million)	3.8	2.8	3.7	4.0	3.8	4.8	5.7	4.1	2.4	3.2

Source: DCMS, BFI
See note to Figure 1.

Figure 3 shows the breakdown of films receiving final cultural test certification by budget band. Nearly all budget bands have seen increases since 2013 and the underlying distribution has remained roughly proportionate over the period. The exception to this can be found in films with budgets of less than £2 million. Whilst these films represented between 71% (2011) and 81% (2020) of total certifications over the period, the share for films in the lowest budget band (under £500,000) increased from 50% in 2011 to 69% in 2020, but the share for films with budgets between £500,000 and £1.9 million decreased from 22% to 12%.

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

Figure 3 Films with final cultural test certification by budget band, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
≥£30 million	13	9	9	16	9	13	23	24	24	15
£10-£29.9 million	7	5	7	8	12	15	8	11	16	15
£5-£9.9 million	15	7	12	22	10	12	17	19	20	13
£2-£4.9 million	20	21	22	15	17	19	28	26	32	25
£0.5-£1.9 million	41	46	39	43	62	41	45	62	51	45
<£0.5 million	93	99	93	134	127	169	159	195	227	256
Total	**189**	**187**	**182**	**238**	**237**	**269**	**280**	**337**	**370**	**369**

Source: DCMS, BFI
Data updated since publication of the 2020 Statistical Yearbook.

Table 2 shows the distribution of budgets for all films certified under the cultural test in the 10-year period. The 6% of films with budgets of £30 million or over accounted for 81% of the aggregate budget, while the 76% of films with budgets of under £2 million accounted for only 3%.

Table 2 Films with final cultural test certification, distribution by budget band, 2011-2020

Budget band	Number	% number	Total budget (£ million)	% budget
≥£30 million	155	5.8	17,373.6	80.7
£10-£29.9 million	104	3.9	1,640.4	7.6
£5-£9.9 million	147	5.5	1,065.1	5.0
£2-£4.9 million	225	8.5	737.1	3.4
£0.5-£1.9 million	475	17.9	477.6	2.2
<£0.5 million	1,551	58.4	222.8	1.0
Total	**2,657**	**100.0**	**21,516.5**	**100.0**

Source: DCMS, BFI
Figures/percentages may not sum to totals due to rounding.

The budgets for co-productions with final certifications between 2011 and 2020 are more evenly distributed than for cultural test films (Table 3). The majority of the aggregate budget (61%) is associated with films in the £5-29.9 million range, whereas films budgeted at £30 million or over account for only 15% of the total budget, compared with 81% for cultural test films. The table also highlights the small proportion of films with budgets of less than £500,000 (8%) compared with cultural test films (58%).

Table 3 Films with final co-production certification, distribution by budget band, 2011-2020

Budget band	Number	% number	Total budget (£ million)	% budget
≥£30 million	3	2.3	120.1	15.1
£10-£29.9 million	19	14.5	284.2	35.8
£5-£9.9 million	28	21.4	202.5	25.5
£2-£4.9 million	45	34.4	154.2	19.4
£0.5-£1.9 million	25	19.1	29.5	3.7
<£0.5 million	11	8.4	2.8	0.4
Total	**131**	**100.0**	**793.2**	**100.0**

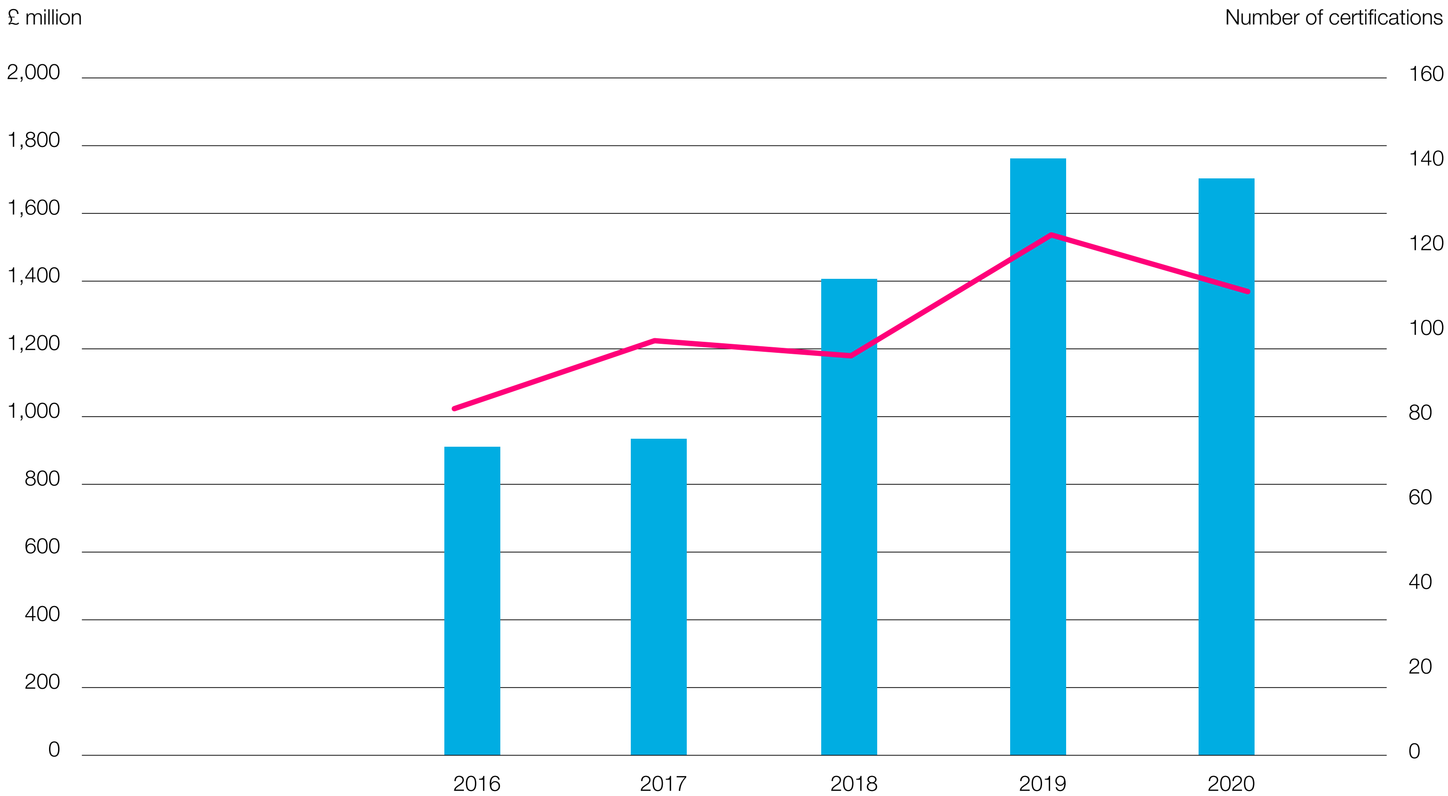
Source: DCMS, BFI
Note: Figures/percentages may not sum to totals due to rounding.

High-end television programme final certifications, 2016-2020

The number of HETV productions receiving final certification as British under the cultural test has fluctuated annually but has shown a general upward trend across the five-year period 2016-2020 (Figure 4). In 2020, 118 UK qualifying HETV productions received final certification, down from a record 135 projects in 2019. The total production budget associated with these projects decreased slightly from £1.8 billion in 2019 to £1.7 billion, (the second highest since the introduction of the tax relief).

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

Figure 4 Number and production budget of HETV productions with final cultural test certifications, 2016-2020

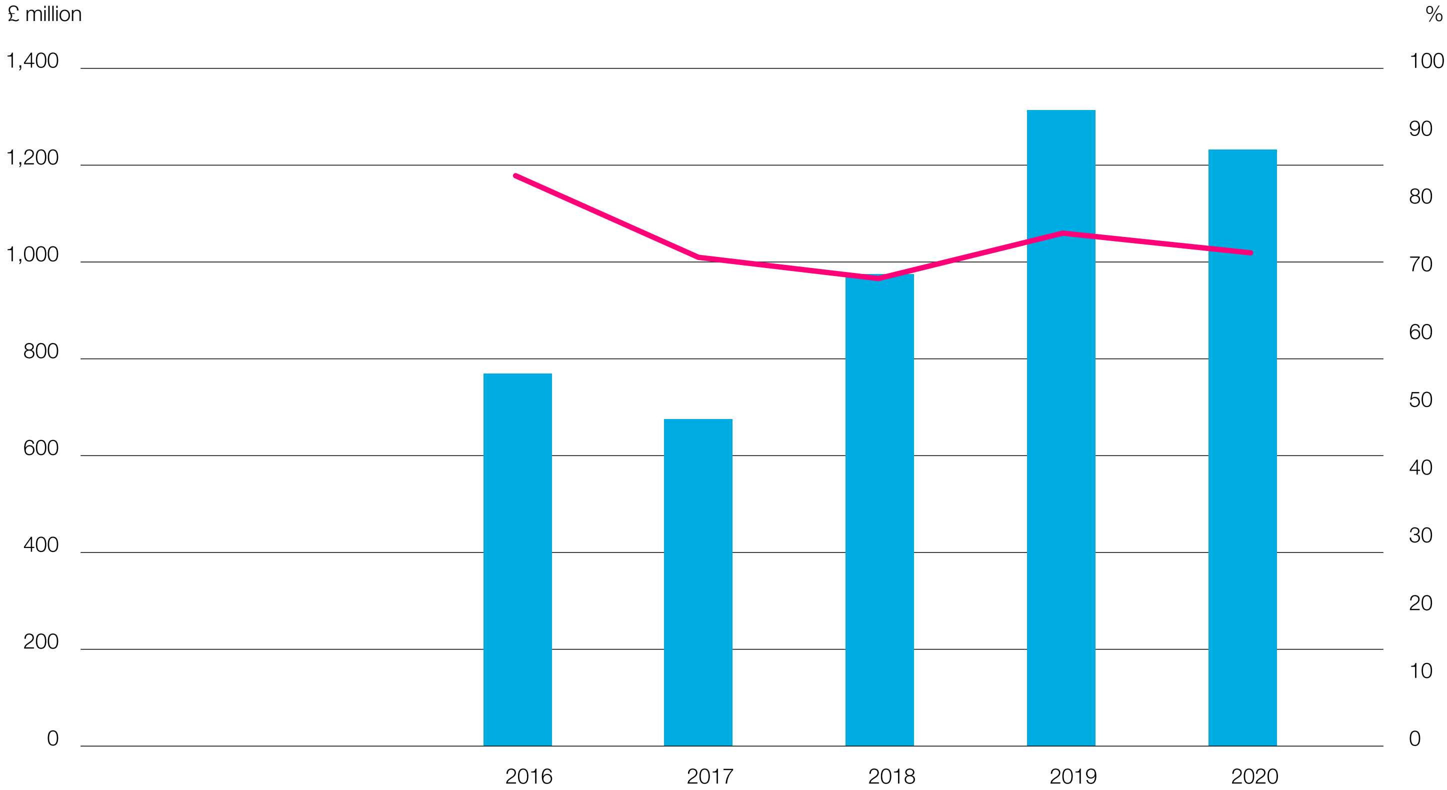


	2016	2017	2018	2019	2020
Production budget (£ million)	911.5	935.1	1,406.3	1,761.8	1,703.4
Number of final certifications	83	103	99	135	118

Source: DCMS, BFI
Notes:
A production can be a single programme or a television series.
Data updated since publication of the 2020 Statistical Yearbook.

Figure 5 shows the total annual UK spend associated with HETV projects certified under the cultural test between 2016 and 2020. There has been year on year fluctuation but an overall upward trend in the level of spend, with an increase from £769 million in 2016 to a record £1.3 billion in 2019, before dropping slightly to £1.2 billion in 2020. As a percentage of total budget, UK spend decreased from a high of 84% in 2016 to 72% in 2020, indicating a rise in the number of HETV productions which make use of foreign locations and facilities.

Figure 5 UK spend of HETV productions with final cultural test certifications and UK spend as % of total budget, 2016-2020



	2016	2017	2018	2019	2020
UK spend (£ million)	768.9	675.5	974.6	1,313.3	1,232.5
UK spend as % of total budget	84.4	72.2	69.3	74.5	72.4

Source: DCMS, BFI
Notes:
A production can be a single programme or a television series.
Data updated since publication of the 2020 Statistical Yearbook.

For the majority of the period, the average median budget per minute of HETV productions receiving final certification under the cultural test was between £23,000 and £26,000 (Table 4). However in 2020, the median budget per minute increased to over £30,000, this is reflects an increase in the number higher budget projects with shorter total running times.

Table 4 Median budgets of HETV productions with final cultural test certification, 2016-2020

Year	Median budget per minute (£)
2016	22,818
2017	22,764
2018	25,721
2019	24,808
2020	30,563

Source: DCMS, BFI
Notes:
The median is the middle value, i.e. there are equal numbers of productions above and below the median.
A production can be a single programme or a television series.
Data updated since publication of the 2020 Statistical Yearbook.

Animation television programme final certifications, 2016-2020

As Table 5 shows, 65 animation television productions received final certification as British under the cultural test in 2020, up from 60 projects in 2019 and the highest number of the period 2016-2020. The total production budget for animations certified under the cultural test was £111 million, down slightly from a record high of £125 million in 2019, while the associated UK production spend value was £81 million, again a decrease from a high of £89 million in 2019. In 2020, the UK spend for these projects as a percentage of total budget was 72%.

As the annual numbers of animation television productions receiving final certification under the UK's co-production treaties have been low throughout the period, figures are not disclosed to maintain confidentiality.

The median budget per minute for animation television projects certified under the cultural test has averaged around £7,000 over the period. In 2020, the median budget per minute was £7,556.

Table 5 Animation television productions with final cultural test certifications, 2016-2020

	2016	2017	2018	2019	2020
Number	38	39	57	60	65
Total budget (£ million)	62.2	50.2	76.0	124.6	111.4
UK spend (£ million)	44.5	42.8	52.5	88.7	80.6
UK spend as % of total budget	71.5	85.4	69.1	71.2	72.4
Median budget per minute (£)	8,548	3,836	7,426	6,640	7,556

Source: DCMS, BFI
Notes:
The median is the middle value, i.e. there are equal numbers of productions above and below the median.
A production can be a single programme or a television series.
Data updated since publication of the 2020 Statistical Yearbook.

Children's television programme final certifications, 2016-2020

The volume and value of children's television productions with final cultural test certification increased substantially between 2016 and 2020 (Table 6). The number of certifications increased to 89 in 2020 from 84 in 2019, and the total production budgets and UK spend associated with these projects increased to £103 million and £101 million respectively. All of these metrics are the highest since the introduction of the tax relief in 2015. The UK spend as a percentage of total budget has been consistently higher for children's television projects than the other production categories in this analysis; in 2020 it was 99%.

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

The median budget per minute for children's television projects certified under the cultural test has shown less variance over the period than for other production categories. In 2020, the median budget per minute was £2,532.

Table 6 Children's television productions with final cultural test certifications, 2016-2020

	2016	2017	2018	2019	2020
Number	36	65	87	84	89
Total budget (£ million)	25.4	49.9	89.1	86.8	102.5
UK spend (£ million)	25.0	46.2	86.2	85.8	101.2
UK spend as % of total budget	98.5	92.6	96.8	98.8	98.8
Median budget per minute (£)	1,952	1,793	2,028	2,336	2,532

Source: DCMS, BFI
Notes:
The median is the middle value, i.e. there are equal numbers of productions above and below the median.
A production can be a single programme or a television series.
Data updated since publication of the 2020 Statistical Yearbook.

Video games final certifications, 2016-2020

A record 262 video game projects received final certification as British in 2020, up from 249 in 2019 (Table 7). The total budget for these projects was £455 million, down substantially from £1.2 billion in 2019, while the associated UK spend was £419 million, down from £624 million in 2019. The large decrease in the value of these projects from 2019 is partly down to a small number of very high budget international projects receiving certification in that year, and it should be noted that the figures for 2020 are significantly higher than all the other years excluding 2019. The UK spend as a percentage of total budget for qualifying video games projects was 92% in 2020, up from 52% in 2019.

The median budget for video games with final certification in 2020 was £97,784, the lowest since the introduction of the tax relief.

Table 7 Video games with final certification, 2016-2020

	2016	2017	2018	2019	2020
Number	189	212	195	249	262
Total budget (£ million)	224.5	277.5	263.9	1,206.7	454.6
UK spend (£ million)	202.2	248.8	201.9	624.2	418.7
UK spend as % of total budget	90.1	89.7	76.5	51.7	92.1
Median budget	171,584	142,425	180,490	150,607	97,784

Source: DCMS, BFI
Notes:
The median is the middle value, i.e. there are equal numbers of video game projects above and below the median.
Video games can only qualify as British for the purpose of the relief through the cultural test.
Data updated since publication of the 2020 Statistical Yearbook.

Children's television programme final certifications,

SCREEN SECTOR PRODUCTION

Cover image: *The Duke* courtesy of Pathé UK

FACTS IN FOCUS

Despite disrupted production schedules over five to six months due to the COVID-19 pandemic, the UK spend of film and UK qualifying high-end television programmes for the whole of 2020 was just 31% down on 2019's record levels.

- The value of film production activity in the UK 2020 was £1.36 billion, down 33% from £2.02 billion in 2019.
- There were 81 domestic UK features (172 in 2019), 18 co-productions (28 in 2019) and 35 inward investment features (81 in 2019).
- The UK spend associated with inward investment features was £1.21 billion, down 32% from £1.77 billion in 2019.
- Ten big budget films (£30 million or over) accounted for 83% of total UK film production spend. All of these films were inward investment projects.
- The UK spend associated with UK qualifying high-end television (HETV) programmes in 2020 was £1.49 billion, down 28% from £2.08 billion in 2019.
- There were 46 domestic UK HETV projects (67 in 2019) and 51 co-productions and inward investments projects (87 in 2019).
- The UK spend of UK qualifying animation television programmes was £61 million, down 7% from £66 million in 2019.
- The UK spend of UK qualifying children's television programmes was £102 million, up 19% from £86 million in 2019.
- UK qualifying video games development generated a UK spend of £91 million from 23 projects.

Screen sector production

Background to UK screen production in 2020

In March 2020, the public health crisis caused by the COVID-19 pandemic triggered a shut-down of the majority of the UK's film and television production activity. Physical production was cancelled or postponed throughout Q2 (April-June) with the exception of a handful of micro-budget film projects and a small amount of post-production, VFX and animation work.

In response, the BFI, together with industry partners, developed a range of recovery measures to support the film and TV production sector. The BFC launched *Working Safely During COVID-19 in Film and High-end TV Drama Production*, Pact, COBA and the UK broadcasters published *TV Production Guidance: Managing the risk of Coronavirus (COVID-19) in production making*, and UK Screen Alliance published *Guidance for Safe Working in Post-Production and VFX during the COVID-19 Pandemic.* Physical production was able to resume from July (Q3) with the added support of a quarantine exemption for film and TV cast and crew. Support for the production sector was further boosted by the launch in October of the Government's £500-million Film & TV Production Restart Scheme.

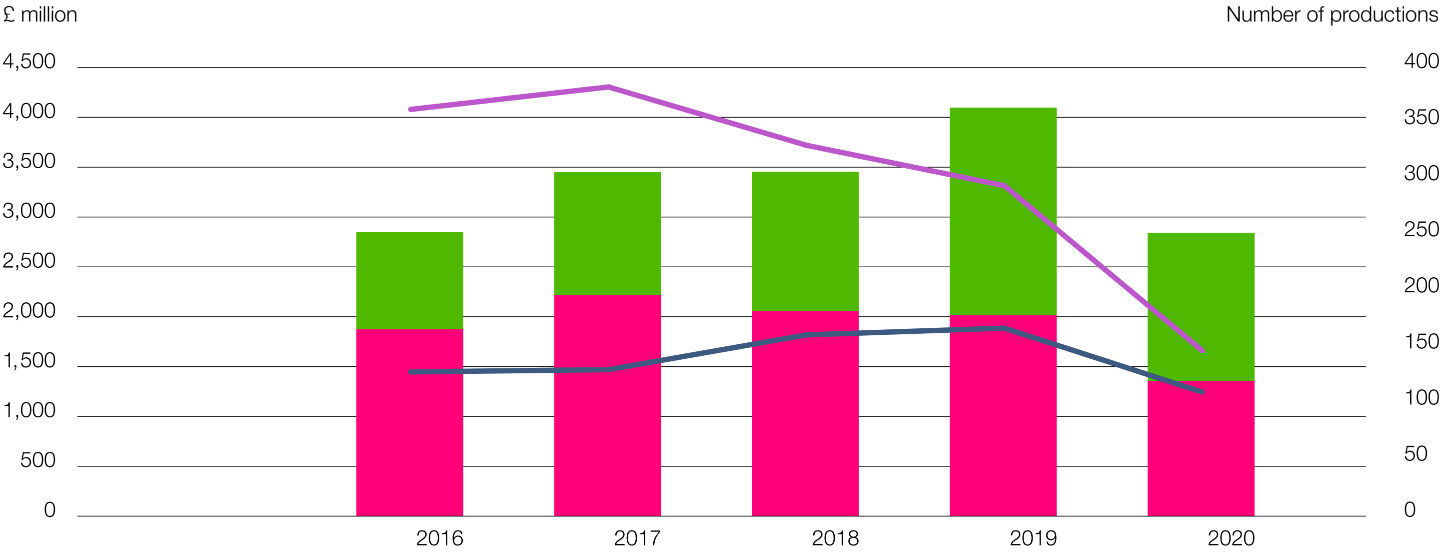
Official production statistics for Q3, published in November, revealed a robust production bounce-back with the combined UK spend generated by film and HETV productions for the period exceeding that recorded in Q1 2020. This recovery was sustained and amplified across Q4, which recorded the second highest quarterly combined total for film and HETV UK spend on record.

Film and HETV production

In 2020, the spend on feature film and high-end television (HETV) production in the UK was £2.84 billion, a decline of 31% on 2019's record UK spend of £4.09 billion, and the lowest total of the five-year period, 2016-2020 (Figure 1).

The total number of productions was also the lowest of the period, with 231 feature film and HETV projects beginning principal photography in the UK in 2020. While the lower volume of production starts in 2020 reflects the impact of COVID-19 on the production sector, these numbers are expected to be revised upwards due to the delay in acquiring full data on production activity in the UK.

Figure 1 Total value and volume of film and HETV productions, 2016-2020



	2016	2017	2018	2019	2020
UK spend film (£ million)	1,872.0	2,220.9	2,061.3	2,015.8	1,355.6
UK spend HETV (£ million)	977.1	1,226.1	1,391.0	2,077.9	1,486.0
Total UK spend (£ million)	**2,849.1**	**3,447.0**	**3,452.3**	**4,093.7**	**2,841.6**
Number of film productions	349	369	317	281	134
Number of HETV productions	115	117	148	154	97
Total number of productions	**464**	**486**	**465**	**435**	**231**

Source BFI
Notes:
Film production data include all films shooting in the UK.
HETV production data include only UK qualifying HETV programmes.
Productions are allocated to the year principal photography commenced; an HETV production can be a single programme or a television series.
Figures for recent years may be amended upwards in the future as more production data become available. The total number of film and HETV productions reported in the 2020 Statistical Yearbook was 308; this has been revised upwards to 435 productions.

The value and volume of film and HETV production – quarterly dynamics

Tables 1 and 2 show the UK spend and number of film and HETV productions by quarter for 2020. It also shows a comparative quarterly average for the five-year period, 2015-2019. Figures for Q2 2020 show the severity of the COVID-19 driven disruption to film and HETV production activity. The total UK spend recorded for the quarter was £500,000 from seven micro-budget feature films, in addition to a small amount of post-production, VFX and animation work. For the years 2015 to 2019, the average combined UK spend for film and HETV productions for the second quarter was £872 million from 127 productions.

Production in 2020 resumed with the first major film and HETV projects shooting in mid-July. In the third quarter of the year, 81 productions began principal photography compared to a 2015-2019 third-quarter average of 136 productions (-41%). The total UK spend in the third quarter 2020 was £862 million compared with a 2015-2019 third-quarter average of £1.08 billion (-21%). Indicating the strength of the recovery, both the value and volume of film and HETV productions in the third quarter 2020 were higher than in the first quarter: total UK spend was up £76 million (+10%) and there were 15 more productions (+23%).

The production recovery accelerated into Q4 2020. The 77 film and HETV productions starting principal photography in the final quarter of the year had a combined UK spend of £1.19 billion. This was 38% higher than the UK spend for Q3 and a 113% increase on the average fourth-quarter spend for the years 2015 to 2019. The combined UK production spend in Q4 2020 was the second highest quarterly production value recorded for these categories (only exceeded by the £1.54 billion recorded for Q3 2019). The strength of the final quarter's performance was led by a surge in HETV production (£779 million from 34 projects). This was 88% higher than the UK spend of feature films in the quarter and was almost three times (+189%) the 2015-2019 Q4 average UK spend for HETV projects.

Table 1 UK spend (£ million) film and HETV by quarter, 2020 and average 2015-2019

UK spend (£ million)	Q1	Q2	Q3	Q4	Annual total
Film 2020	457.9	0.5	483.8	413.4	1,355.6
HETV 2020	328.5	-	378.4	779.1	1,486.0
Combined film and HETV 2020	**786.5**	**0.5**	**862.1**	**1,192.5**	**2,841.6**

UK spend (£ million)	Q1	Q2	Q3	Q4	Annual total
Film average 2015-2019	498.6	526.6	634.8	289.7	1,949.7
HETV average 2015-2019	245.0	345.5	446.6	269.5	1,306.7
Combined film and HETV average 2015-2019	**743.6**	**872.1**	**1,081.4**	**559.2**	**3,256.3**

Source: BFI

Notes: Figures may not sum to totals due to rounding

Table 2 Volume of film and HETV production by quarter, 2020 and average 2015-2019

Volume of production	Q1	Q2	Q3	Q4	Annual total
Film 2020	43	7	41	43	134
HETV 2020	23	-	40	34	97
Combined film and HETV 2020	**66**	**7**	**81**	**77**	**231**

Volume of production	Q1	Q2	Q3	Q4	Annual total
Film average 2015-2019	76	93	99	69	337
HETV average 2015-2019	28	37	37	25	126
Combined film and HETV average 2015-2019	**104**	**130**	**136**	**94**	**463**

Source: BFI

The value of UK film production, 2011-2020

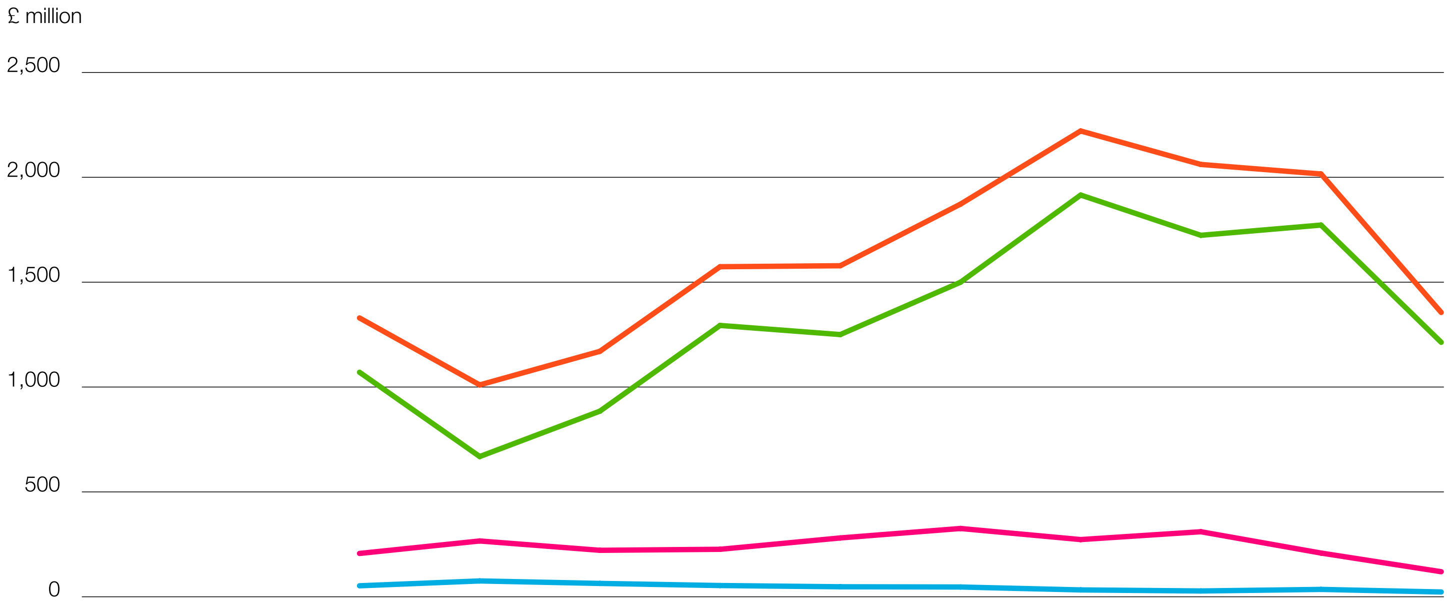
Figure 2 shows the aggregate UK spend of feature films that started principal photography in 2020 was £1.36 billion, down 33% compared with 2019 (£2.02 billion). This was the first year to record an overall UK spend below £1.5 billion since 2013, when the total was £1.17 billion. This was to a large extent due to the halt or postponement of production at the end of the first quarter of the year.

In 2020, inward investment features accounted for £1.21 billion of the total UK production value, a decrease of 32% on the 2019 total of £1.77 billion, and the lowest level of UK spend associated with inward investment productions since 2013. The proportion of overall UK spend attributed to inward investment productions in 2020 was 89.5%, up from 88% in 2019. Inward investment films shooting in the UK in 2020 included *Cinderella, Mission: Impossible 7* and *The Northman*, and Indian productions *Bell Bottom, The Chef* and *Paani Ch Madhaani.*

Domestic UK features shooting in 2020, which included *Benediction, The Duke* and *Mothering Sunday*, had a UK production value of £119.5 million, a decrease of £89 million from £208.5 million in 2019 (-43%). This is the lowest level of UK spend associated with domestic UK features in the 10-year period shown in the chart. While this is partly explained by the impact of the pandemic on domestic production activity, it should be borne in mind that the figures for UK domestic films for the most recent years are likely to be amended upwards as further data are acquired, particularly on low and micro-budget production activity.

The UK spend of official and un-official co-productions in 2020 was £23 million, down 35% from £35 million in 2019. Co-productions starting principal photography in the year included *Ballywalter, Daemon Mind* and *My Son*.

Figure 2 UK spend of feature films produced in the UK, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Inward Investment	1,070.5	668.6	885.0	1,293.7	1,250.2	1,499.7	1,915.4	1,723.5	1,772.2	1,213.2
Domestic UK	206.6	266.1	221.6	226.4	280.5	325.6	272.8	310.1	208.5	119.5
Co-production	52.4	75.5	63.7	53.6	47.7	46.6	32.7	27.7	35.1	22.9
Total	**1,329.5**	**1,010.1**	**1,170.3**	**1,573.7**	**1,578.3**	**1,872.0**	**2,220.9**	**2,061.3**	**2,015.8**	**1,355.6**

Source: BFI
Notes:
Data are rounded to the nearest £0.1 m 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 began or to the year in which the visual effects were undertaken in the case of VFX-only films.
Inward investment feature films include inward co-productions and VFX-only films.
Includes films with budgets of under £500,000.
Data updated since publication of the 2020 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 (e.g., locations) and/or the UK's filmmaking infrastructure and/or UK film tax relief.
A domestic (indigenous) UK feature is a film made by a UK production company that is produced wholly or partly in the UK.
A co-production is a film made by companies from more than one country, often under the terms of a bilateral co-production treaty or the European Convention on Cinematographic Co-production.

Table 3 shows the split between UK studio-backed films and UK and foreign independent films made partly or wholly in the UK. In 2020, UK studio-backed films accounted for 78% (£1.06 billion) of overall production spend in the UK, an increase on the 2019 share of 66% (£1.33 billion).

Table 3 UK spend of UK studio-backed and independent films produced in the UK, 2011-2020, £ million

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK studio-backed films*	1,015.7	654.2	758.1	1010.2	1,156.1	1,183.5	1,507.2	1,409.3	1,326.0	1,055.7
Independent films**	313.8	355.9	412.3	563.6	422.3	688.5	713.7	651.9	689.8	299.9
Total	**1,329.5**	**1,010.1**	**1,170.3**	**1,573.7**	**1,578.3**	**1,872.0**	**2,220.9**	**2,061.3**	**2,015.8**	**1,355.6**
% UK studio-backed films	76.4	64.8	64.8	64.2	73.2	63.2	67.9	68.4	65.8	77.9

Source: BFI

Notes:

The categories in this table differ to previous years when data for 'UK independent films' and 'non-UK films' were included separately.

* 'Studio-backed' means a UK film wholly or partly financed and controlled by a US studio but featuring UK cast, crew, locations, facilities, post-production and often UK source material.

** Films produced without creative or financial input from the major US studio companies. 'Independent' films here include both UK qualifying independent productions and non-UK independent productions.

Figures may not sum to totals due to rounding.

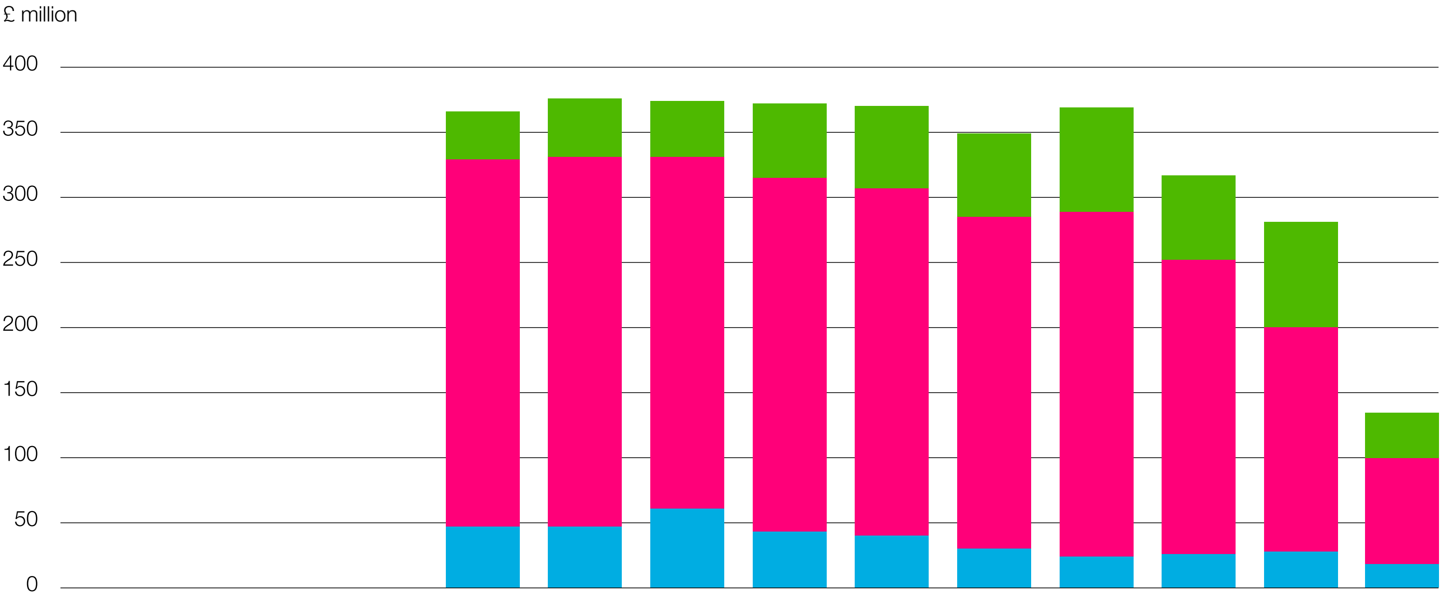
Data updated since publication of the 2020 Statistical Yearbook.

The volume of UK film production, 2011-2020

In 2020, 135 films were produced wholly or in part in the UK, down from 281 in 2019. Of these, 35 were inward investment features, 81 were domestic UK features (of which 38 had budgets of less than £500,000) and 18 were co-productions (Figure 3). The volume of inward investment features declined by 57% compared with the record number of such productions reported for 2019 (81). The fall in the volume of domestic UK productions entering production in 2020 was less sharp than for inward films, with a decrease of 52% compared with 2019 (172), while co-productions saw the smallest decline, down 36% compared with 2019 (28).

It should be noted again there is often a delay in acquiring full data on production activity in the UK, so numbers for the most recent years are likely to be revised upwards.

Figure 3 Number of feature films produced in the UK, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Inward investment	37	45	43	57	63	64	80	65	81	35
Domestic UK	282	284	270	272	267	255	265	226	172	81
Of which budget >=£500k	92	77	71	85	95	100	88	101	66	43
Of which budget <£500k	190	207	199	187	172	155	177	125	106	38
Co-production	47	47	61	43	40	30	24	26	28	18
Of which majority and parity co-production	24	25	35	19	18	10	13	6	12	9
Of which minority co-production	23	22	26	24	22	20	11	20	16	9
Total	**366**	**376**	**374**	**372**	**370**	**349**	**369**	**317**	**281**	**134**

Source: BFI RSU
Notes:
Inward investment includes co-productions and VFX-only titles.
Includes both official and unofficial co-productions.
Data updated since publication of the 2020 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.

Table 4 shows that UK and non-UK originated independent films accounted for 94% of all films produced in the UK in 2020, the same share as in 2019. The number of UK studio-backed films (eight) produced in 2020 was the lowest of the 10-year period covered in the table (these films account for the majority of UK production spend). The number of independent films produced in the year was also the lowest of the period and was less than half the number produced in 2019.

Table 4 Number of UK studio-backed and independent films produced in the UK, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK studio-backed films*	18	15	16	16	24	16	16	16	17	8
Independent films**	348	361	358	356	346	333	353	301	264	126
Total	**366**	**376**	**374**	**372**	**370**	**349**	**369**	**317**	**281**	**134**
% UK studio-backed films	4.9	4.0	4.3	4.3	6.5	4.6	4.3	5.0	6.0	6.0

Source: BFI
* 'Studio-backed' means a UK film wholly or partly financed and controlled by a US studio but featuring UK cast, crew, locations, facilities, post-production and often UK source material.
** Films produced without creative or financial input from the major US studio companies. 'Independent films' here include both UK qualifying independent productions and non-UK independent productions.
Data updated since publication of the 2020 Statistical Yearbook.

Film production by genre, 2018-2020

Table 5 and Figure 4 show a breakdown of UK film production by genre for the years 2018-2020. The drama and documentary genres accounted for the largest proportion of films shot in the three-year period, at 19% and 17% respectively, but accounted for only 7% and 1% of total UK spend. Other genres equalling or exceeding 10% of total productions were comedy, which accounted for 12% of films (6% of UK spend), horror, which accounted for 11.5% of films (1% of UK spend), and thriller, with 10% of films (4% of UK spend). The biggest spending genre was action which accounted for 46% (£2.51 billion) of overall UK spend but only 8% of films.

Table 5 Genre of film production in the UK, 2018-2020 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	60	8.2	3,738.7	46.5	2,507.6	46.2
Fantasy	14	1.9	1,005.0	12.5	701.1	12.9
Drama	140	19.1	569.0	7.1	392.1	7.2
Comedy	84	11.5	395.2	4.9	302.0	5.6
Thriller	73	10.0	450.2	5.6	206.8	3.8
Animation	8	1.1	271.3	3.4	196.8	3.6
Biopic	22	3.0	193.7	2.4	155.9	2.9
Crime	33	4.5	164.5	2.0	150.8	2.8
Sci-fi	20	2.7	180.0	2.2	139.9	2.6
Musical	8	1.1	179.1	2.2	126.4	2.3
War	9	1.2	128.8	1.6	115.7	2.1
Family	7	1.0	239.2	3.0	112.0	2.1
Romance	32	4.4	156.8	2.0	100.2	1.8
Documentary	127	17.3	82.8	1.0	66.9	1.2
Horror	80	10.9	70.1	0.9	54.2	1.0
Adventure	8	1.1	104.6	1.3	43.8	0.8
Other	7	1.0	110.9	1.4	60.4	1.1
Total	**732**	**100.0**	**8,039.8**	**100.0**	**5,432.7**	**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 4 Genre of UK film production, 2018-2020

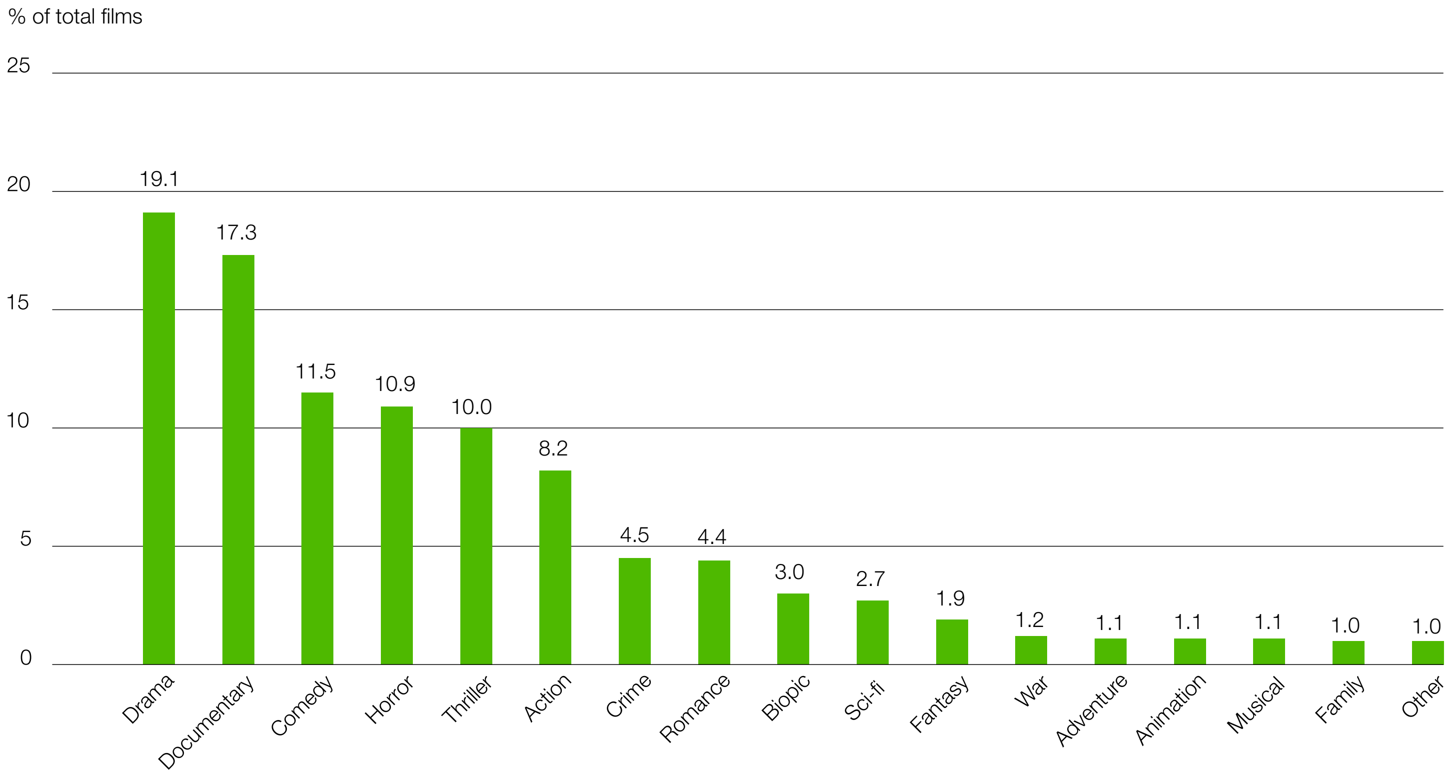


Table 6 shows the top 10 genres by share of UK spend for domestic UK films and inward investment/co-production titles (inward investment and co-production films have been combined for data disclosure reasons). The table shows a more even distribution of genres for domestic UK films compared with inward investment/co-production films. The top three genres by share of UK spend for domestic UK films – drama, comedy, and thriller – accounted for 54% of total UK production value for these films, while a single genre for inward investment/co-production films – action – accounted for 52% of the UK production value for this category.

Table 6 Top 10 genres for domestic UK and inward investment/co-production films, 2018-2020 (ranked by % UK spend)

Domestic UK		
Genre	**% of total films**	**% of total UK spend**
Drama	18.6	21.9
Comedy	11.5	20.1
Thriller	9.4	11.9
Documentary	23.0	8.7
Biopic	2.3	7.7
Horror	14.8	6.3
Action	4.2	4.8
Sci-fi	2.5	4.4
Crime	5.0	3.7
Family	1.0	2.0
Total top 10	**92.3**	**91.5**
Total other genres	**7.7**	**8.5**
Total films = 479		

Inward investment & co-production		
Genre	**% of total films**	**% of total UK spend**
Action	15.8	51.7
Fantasy	3.2	14.6
Drama	20.2	5.3
Animation	2.4	3.7
Comedy	11.5	3.6
Thriller	11.1	2.7
Crime	3.6	2.7
Sci-fi	3.2	2.3
Biopic	4.3	2.2
Romance	8.3	1.9
Total top 10	**83.4**	**90.7**
Total other genres	**16.6**	**9.3**
Total films = 253		

Source: BFI
Notes:
The data have been limited to the top 10 ranking genres due to disclosure reasons.
Percentages may not sum to sub-totals due to rounding.
See notes to Table 5.

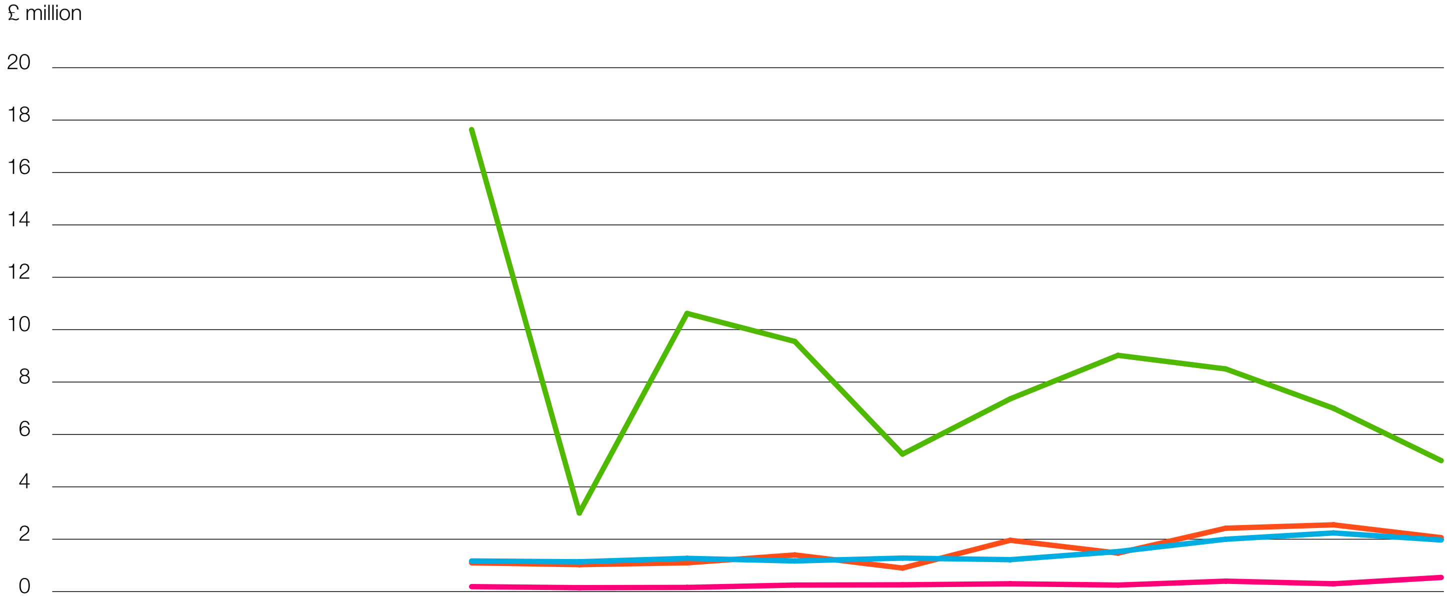
Budget trends, 2011-2020

Figure 5 shows the median budget for domestic UK, inward investment and co-production films between 2011 and 2020. It also includes data on median budgets for domestic UK films excluding those with budgets of less than £500,000.

The median budget for inward investment films dropped from £7 million in 2019 to £5 million in 2020, a 29% decline, and the second lowest median across the 10-year period. The median budget for co-productions declined by 19% from £2.6 million in 2019 to £2.1 million in 2020. In contrast, the median budget for all domestic UK productions grew to a record £540,000 in 2020.

The increase in the median for domestic film production budgets was driven by a huge increase (437%) in the median for films with budgets of less than £500,000, which offset a decline of 12% in the median for larger domestic films. The increase in median budgets for domestic films with budgets of less than £500,000 was due to a decrease in the number of very low budget productions (under £100,000) compared with 2019. In 2020, 30% of all domestic UK films had budgets of less than £100,000 compared with 54% in 2019.

Figure 5 Median feature film budgets, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Inward investment	17.64	3.00	10.62	9.55	5.25	7.36	9.02	8.50	7.00	5.00
Domestic UK - all productions	0.19	0.15	0.16	0.25	0.26	0.30	0.25	0.40	0.30	0.54
Domestic UK with budgets ≥ £500,000	1.17	1.14	1.27	1.17	1.28	1.22	1.53	2.00	2.24	1.97
Co-production	1.10	1.03	1.10	1.40	0.90	1.96	1.47	2.42	2.55	2.06

Source: BFI

Notes:

Median budget is the middle value of budgets (i.e., there are equal numbers of films above and below the median). The median in this case is a better measure of central tendency than the mean, as it avoids the upward skew of a small number of high budget productions.

Data updated since publication of the 2020 Statistical Yearbook.

Data in this table are shown to two decimal places to gain a clearer picture of change over the period for domestic UK films.

Size distribution of budgets

The budget size distribution for the three main categories of films made in 2020 is outlined in Tables 7 to 9.

Table 7 shows that 10 inward investment features with budgets of £30 million or over (29% of all inward features) accounted for 92% of the total budget for this category. There were 17 inward features with budgets of less than £5 million (49% of inward features), which accounted for 2% of the total budget for these films.

Table 7 Size distribution of budgets, inward investment films, 2020

Budget band	Number of films	Total budget in band (£ million)	% of total budget
>=£30 million	10	1,598.6	92.3
£10-£29.9 million £5-£9.9 million	8	92.9	5.5
£2-£4.9 million	9	29.8	1.7
<£2 million	8	11.0	0.6
Total	**35**	**1,732.2**	**100.0**

Source: BFI
Note: Figures/percentages may not sum to totals due to rounding
The number of inward features with budgets of £5 million to £29.9 million has been aggregated for disclosure reasons, due to the low numbers in the individual budget bands.

In 2020, eight domestic UK films had budgets of £5 million or over (10% of all domestic UK productions), representing 54% of the total budget for this category (Table 8). Thirty-eight domestic UK films (47% of all domestic UK productions) had budgets of less than £500,000, accounting for 3% of the total budget for these films.

Table 8 Size distribution of budgets, domestic UK films, 2020

Budget band	Number of films	Total budget in band (£ million)	% of total budget
>= £5 million	8	80.1	53.9
£2-£4.9 million	13	38.8	26.1
£0.5-1.9 million	22	25.3	17.0
<£0.5 million	38	4.5	3.0
Total	**81**	**148.6**	**100.0**

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

Four of the 18 co-productions shooting in the UK in 2020 had budgets of £5 million or over, accounting for 63% of the total budget in this category (Table 9). The nine co-productions with budgets of less than £2 million accounted for 14% of the aggregate budget for these films.

Table 9 Size distribution of budgets, co-productions, 2020

Budget band	Number of films	Total budget in band (£ million)	% of total budget
>=£5 million	4	36.5	62.7
£2-4.9 million	5	13.6	23.3
£0.5-1.9 million	5	7.0	12.0
<£0.5 million	4	1.1	1.9
Total	**18**	**58.2**	**100.0**

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

Big budget productions, 2011-2020

Table 10 demonstrates the importance to the UK film economy of a small number of big budget productions. (These are usually inward investment films). Between 2014 and 2019 an average of 22 big budget films were produced each year, and these accounted for an average share of 76% of UK production spend. In 2020, the share for big budget films hit a record level of 83% (from 10 films). In 2019, there were 23 films with budgets of £30 million or over which accounted for 76% of UK production spend.

Table 10 Big budget films' contribution to UK spend, 2011-2020

	Number of films with budgets >=£30 million	Value of associated UK spend (£ million)	Total UK spend (£ million)	Big budget film % of UK spend
2011	17	1,009.8	1,329.5	76.0
2012	10	634.3	1,010.1	62.8
2013	16	817.0	1,170.3	69.8
2014	20	1,157.1	1,573.7	73.5
2015	16	1,119.4	1,578.3	70.9
2016	25	1,453.1	1,872.0	77.6
2017	28	1,768.9	2,220.9	79.6
2018	19	1,500.1	2,061.3	72.8
2019	23	1,538.8	2,015.8	76.3
2020	10	1,121.3	1,355.6	82.7

Source: BFI
Note: Data updated since publication of the 2020 Statistical Yearbook.

UK spend as a percentage of total production budget, 2011-2020

Table 11 shows UK spend as a percentage of total production budget for inward investment films, domestic UK films and co-productions from 2011 to 2020. Over the period, UK domestic films have consistently had the highest proportion of UK spend whilst co-productions have had the lowest. In the year that the COVID-19 pandemic hit, the UK share of inward investment budgets was the highest (70%) of the period. The UK spend of domestic films meanwhile declined from 88% of total budget in 2019 to 80% in 2020. There was only marginal variance in the share for co-productions between 2019 and 2020.

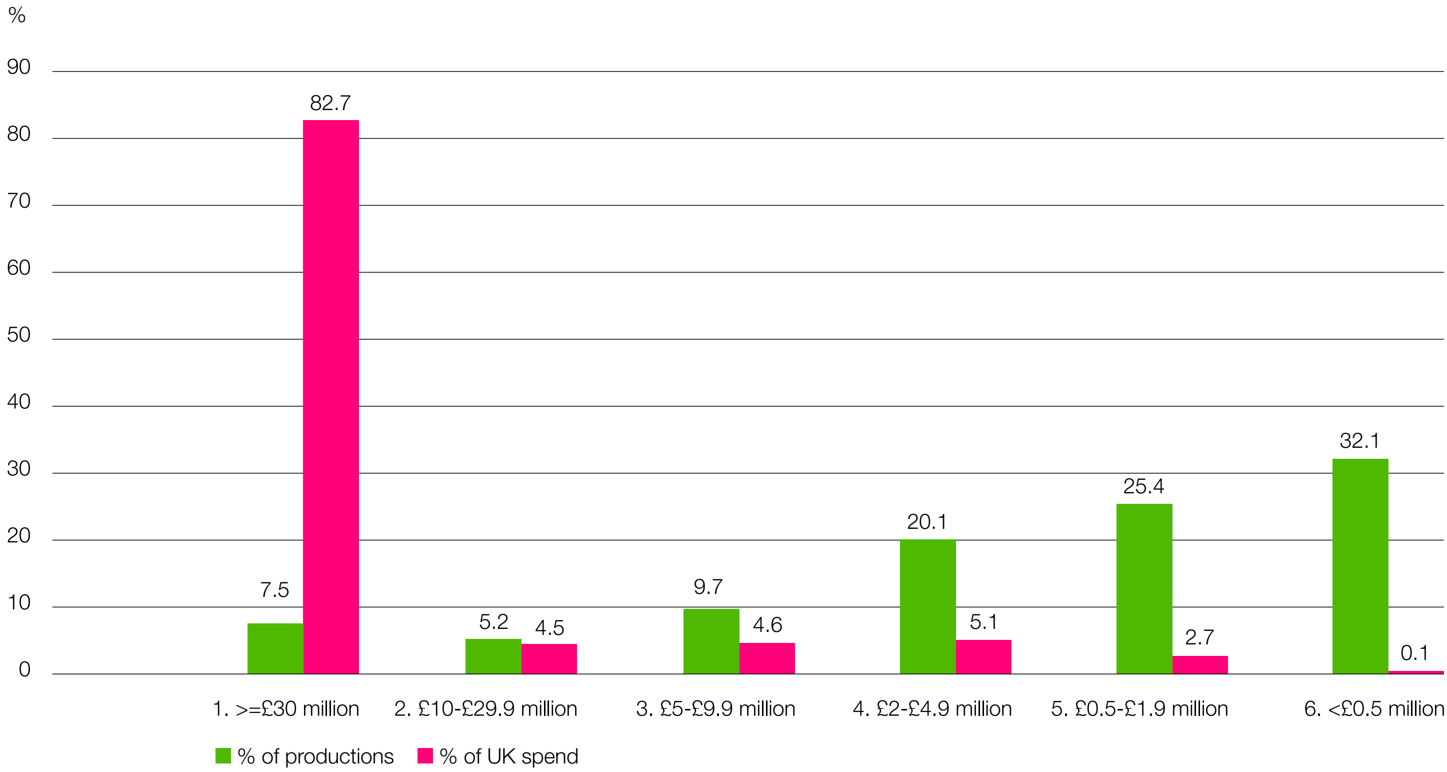
Table 11 UK spend as percentage of total production budget, 2011-2020

	Inward investment	Domestic UK	Co-production
2011	55.9	86.0	36.0
2012	64.0	88.8	46.0
2013	68.9	85.7	45.2
2014	57.2	78.6	34.1
2015	60.0	89.4	40.3
2016	60.7	79.9	34.2
2017	52.3	85.0	38.9
2018	67.2	85.3	35.6
2019	64.0	87.5	41.0
2020	70.0	80.4	39.3

Source: BFI
Note: Data updated since publication of the 2020 Statistical Yearbook.

Figure 6 underlines that a small proportion (7.5%) of titles with a UK spend of £30 million or over were responsible for the majority (83%) of UK production spend in 2020. Conversely, the 32% of films with a UK spend of less than £500,000 represented under 0.5% of production investment in the UK.

Figure 6 Percentage of productions and UK spend by category of UK spend, 2020



Source: BFI

Domestic UK productions by territory of shoot

A majority of domestic UK productions beginning principal photography in 2020 (72 out of 81) were shot exclusively in the UK (Table 12), while just nine were shot partly or wholly outside the country. As a proportion of total budget, the non-UK spend of domestic productions in 2020 was 20% compared with 9% in 2019.

Table 12 Domestic UK productions by territory of shoot, 2020

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	72	90.6	0.5	0.6
UK and other	4	20.7	1.8	8.9
Other only	5	37.3	26.7	71.5
Total domestic UK films	**81**	**148.6**	**29.1**	**19.6**

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

Table 13 shows the number of shoots by territory for domestic UK films in 2020. As some films were shot in two or more territories, the total number of shoots is greater than the total number of films. There were 17 non-UK shoots in 16 production territories.

Table 13 Domestic UK productions, shoots by territory, 2020

Territory of shoot	Number of shoots
UK	76
Malta	2
Australia	1
Austria	1
Brazil	1
China	1
Egypt	1
France	1
India	1
Israel	1
Italy	1
Japan	1
Morocco	1
New Zealand	1
Turkey	1
UAE	1
USA	1
Total shoots	**93**

Source: BFI

Co-productions by territory of shoot

Table 14 shows that in contrast to UK domestic productions, co-productions were usually shot partly or wholly abroad. Six of the 18 films, with a total budget of just under £14 million, were shot exclusively in the UK. Non-UK spend accounted for 61% of the total budget of co-productions in 2020.

Table 14 Co-productions by territory of shoot, 2020

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	6	14.3	3.7	25.9
UK and other	7	19.6	9.4	48.1
Other only	5	24.3	22.2	91.3
Total co-productions	**18**	**58.2**	**35.3**	**60.7**

Source: BFI

The territory distribution of co-production shoots is shown in Table 15. The majority of shoots were in the UK or elsewhere in Europe.

Table 15 Co-productions, shoots by territory, 2020

Territory of shoot	Number of shoots
UK	13
Republic of Ireland	3
Belgium	2
France	2
Sweden	2
Bangladesh	1
Canada	1
China	1
Germany	1
Greece	1
Hungary	1
Italy	1
New Zealand	1
Philippines	1
Poland	1
Portugal	1
Romania	1
Serbia	1
Spain	1
USA	1
Total shoots	**37**

Source: BFI

Production company activity levels

The BFI Research and Statistics Unit recorded 241 production companies associated with films shot in the UK or co-productions involving the UK in 2020 (Table 16), a decrease from 320 in 2019. Of these, 220 companies (91%) were associated with a single feature. These were a mixture of distinct production companies and special purpose vehicles (i.e. companies set up to make a single film).

Table 16 Film production company activity, 2020

Number of features per company	Number of companies
1	220
2	18
3	2
4	0
6	1
Total	**241**

Source: BFI RSU
Note: Includes all production categories.

In contrast to production reporting of film projects where we seek to track all production activity in the UK, for HETV, animation, children's TV programmes and video games projects we currently only record production data for projects that have qualified for the UK screen sector tax reliefs. While projects can apply to be certificated during production, many wait until production has finished before applying. The data and commentary for these screen production sectors are therefore based on a subset of UK production activity and will be subject to updates as more projects go through the certification process. It should be noted that for video game projects the time between the start of development and final certification can be particularly substantial.


Image: *Roald and Beatrix: The Tail of the Curious Mouse* © 2020 Hartswood Films Ltd. Photograph by Simon Ridgway

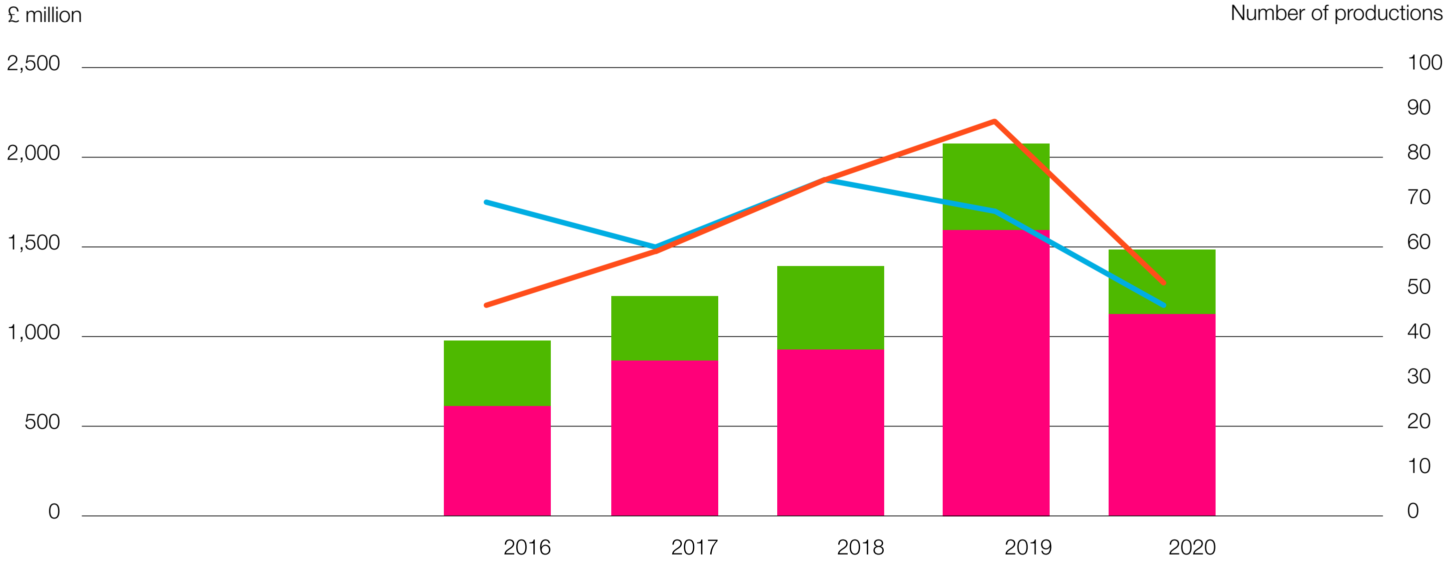
The value and volume of HETV production, 2016-2020

With production halted for a good part of the year due to the pandemic, 2020 was the first year to record a decline in the UK production value associated with the filming of UK qualifying HETV projects since the HETV tax relief was introduced in 2013 (Figure 7). The total UK spend for HETV production in 2020 was £1.49 billion, down 28% from £2.08 billion in 2019. The UK spend generated by inward investment and co-production projects was £1.13 billion, down 9% from the £1.59 billion reported for 2019. Despite the impact of COVID-19 on production activity, the UK spend generated by inward investment and co-production HETV projects in 2020 was the second highest recorded since the introduction of the tax relief. The share of UK spend accounted for by inward investment and co-production projects was 76%, comparable to 2019's 77%. The UK spend of domestic HETV productions was £358 million, down 26% on 2019's figure.

In 2020, 97 UK qualifying HETV projects were shot in the UK, a decline of 31% on 2019's 154 productions. There were 46 domestic UK projects, down from 67 in 2019, and 51 inward investment and co-production projects, the lowest total since 2016 (46 projects). As with film production, the figures for HETV production across recent years are likely to be revised upwards as more detailed information on production activity becomes available.

HETV inward investment and co-production projects shooting in the UK in 2020 included *Frank of Ireland* (6x30 mins), *Gentleman Jack* – Series 2 (6x60 mins), *Invasion* (8x60 mins), *Vienna Blood* – Series 2 (3x90 mins) and *The Witcher* – Series 2 (8x60 mins). HETV domestic UK productions included *Line of Duty* – Series 6 (6x60 mins), *Roald and Beatrix: The Tail of the Curious Mouse* (1x90 mins), *Too Close* (3x47 mins) and *Unforgotten* – Series 4 (6x60 mins).

Figure 7 UK spend and number of UK qualifying HETV productions, 2016-2020



	2016	2017	2018	2019	2020
UK spend domestic UK (£ million)	365.1	358.6	465.0	482.3	357.5
UK spend co-production & inward investment (£ million)	612.0	867.5	926.0	1,595.6	1,128.5
Total UK spend	**977.1**	**1,226.1**	**1,391.0**	**2,077.9**	**1,486.0**
Number of domestic UK productions	69	59	74	67	46
Number of co-production & inward investment productions	46	58	74	87	51
Total productions	**115**	**117**	**148**	**154**	**97**

Source: BFI
Notes:
Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.
Data for co-production and inward investment projects have been combined to avoid disclosing budget details for individual titles.
Tax relief for HETV programmes was introduced in 2013.
Data updated since publication of the 2020 Statistical Yearbook.

SVoD-backed HETV production, 2016-2020

Table 17 shows the number of UK qualifying HETV projects produced by the two leading stand-alone streaming platforms, Netflix and Amazon Prime Video, between 2016 and 2020, and their associated UK spend. Mirroring 2020's decline in overall film and HETV production activity, the volume and value of productions backed by Netflix and Amazon fell from the record levels reported in 2019. The UK spend of SVoD-backed HETV productions in 2020 was £403 million, a decrease of 44% compared with 2019 (£670 million). The Netflix and Amazon financed or co-financed share of total HETV UK production spend fell from 32% in 2019 to 27% in 2020.

With the exception of 2017, fully-funded projects generated the majority of UK production spend throughout the period. In 2020, they accounted for 87% of the Netflix and Amazon UK production spend, the highest proportion of the period (the fully-funded share in 2019 was 67%).

SVoD-backed HETV productions beginning principal photography in 2020 included Netflix's *Top Boy* – Series 4 (10x60 mins) and *Red Notice* (1x120 mins), and Amazon's *The Power* (10x60 mins).

Table 17 Value and volume of UK qualifying SVoD-backed HETV productions, 2016-2020

	2016	2017	2018	2019	2020
UK spend of fully-funded SVoD productions (£ million)	127.5	130.9	183.2	512.4	349.3
UK spend of co-partnered SVoD productions (£ million)	73.4	174.3	122.5	158.0	53.7
Total UK spend of SVoD-backed productions (£ million)	**200.9**	**305.2**	**305.7**	**670.4**	**403.0**
Total UK spend of HETV productions (£ million)	**977.1**	**1,226.1**	**1,391.0**	**2,077.9**	**1,486.0**
SVoD-backed UK spend as % of total	*20.6*	*24.9*	*22.0*	*32.2*	*27.1*
Number of fully-funded SVoD productions	8	10	14	20	14
Number of co-partnered SVoD productions	7	15	10	13	6
Total SVoD-backed productions	**16**	**25**	**24**	**33**	**20**
Total HETV productions	**115**	**117**	**148**	**154**	**97**
SVoD-backed productions as % of total	*13.9*	*21.4*	*16.2*	*21.4*	*20.6*

Source: BFI SVoD companies: Netflix and Amazon Prime Video

Notes:

See note to Figure 7.

A fully-funded SVoD production is one exclusively financed by the SVoD platform.

A co-partnered SVoD production is a co-production with other broadcasters/investors.

Data updated since publication of the 2020 Statistical Yearbook.

Genre of HETV productions

Table 18 shows a breakdown of 2020 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 solely stand-alone productions.) Crime was the most popular genre for HETV projects accounting for 25 productions (26% of total productions) and a UK spend of £200 million (13% of total UK spend). Drama and comedy were the next most popular genres in terms of volume of production, with respective shares of 25% and 23%. Drama had the largest UK spend at £291 million (20%), while the sci-fi genre was second with £248 million (17%).

Table 18 Genre of UK qualifying HETV productions, 2020 (ranked by UK spend)

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	24	24.7	315.8	17.1	290.9	19.6
Sci-fi	5	5.2	312.9	16.9	248.0	16.7
Comedy	22	22.7	231.6	12.5	229.4	15.4
Thriller	7	7.2	281.7	15.2	214.2	14.4
Crime	25	25.8	227.8	12.3	199.7	13.4
Other	14	14.4	479.4	25.9	303.8	20.4
Total	**97**	**100.0**	**1,849.1**	**100.0**	**1,486.0**	**100.0**

Source: BFI

Notes:

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

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

* Other includes fantasy, action, biopic, war, documentary and musicals. Data are combined to avoid disclosing budget details of individual projects.

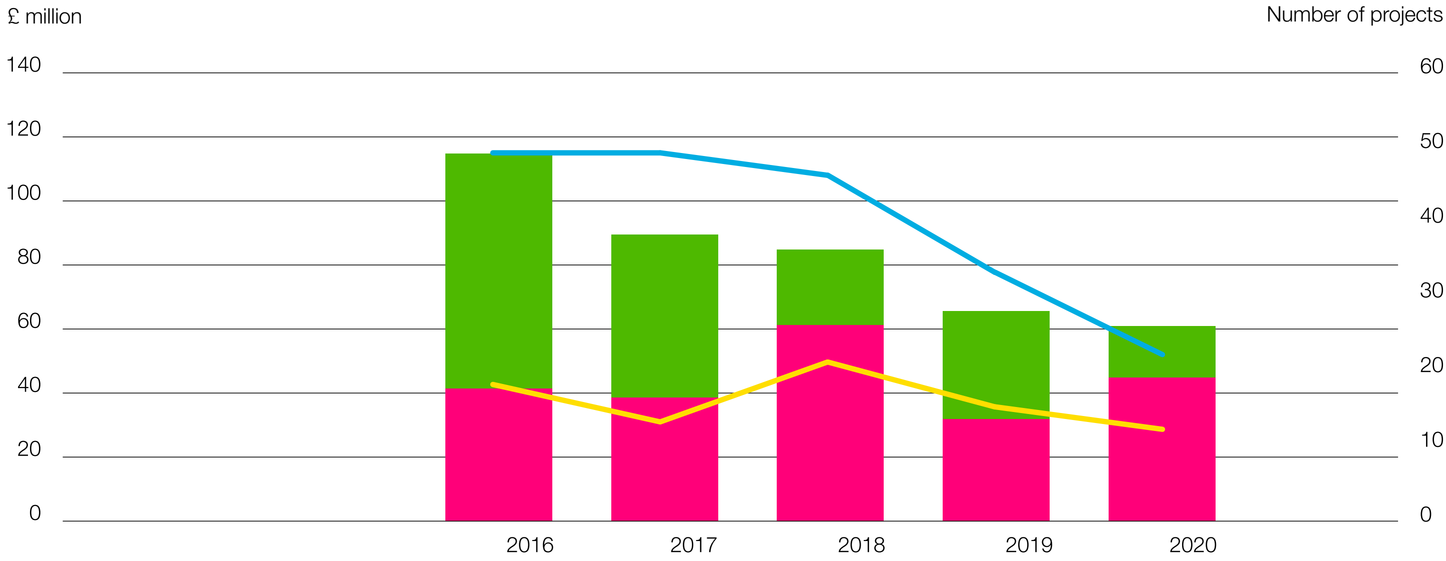
Figures/percentages may not sum to totals due to rounding.

The value and volume of animated television production, 2016-2020

The production data for animation television programmes in 2020 indicate the sector was able to minimise the impact of pandemic restrictions in part because some of its production techniques, such as 2D and 3D animation, better allowed for remote working. In 2020, the total UK production value of UK qualifying animation programmes was £61 million, a decline of just 7% on the 2019 total of £66 million. While the UK spend of domestic UK animation projects dropped from £34 million in 2019 to £16 million in 2020 (-52%), the UK production value of inward investment and co-production projects increased by 41% to reach £45 million (£32 million in 2019), the second highest total reported for non-domestic UK projects since the introduction of the animation television tax relief in 2013.

A total of 34 UK qualifying animation projects began production in 2020, down from 48 in 2019. While this is the lowest figure of the reported period, it should be noted that figures for the most recent years are likely to be revised upwards as more data become available. Domestic UK titles going into production in the year included *The Daleks!* (5x10 mins) and *Quentin Blake's Clown* (1x21 mins), while inward investment/co-production titles included *The Misadventures of Master Moley* (52x11 mins) and *Robin Robin* (1x30 mins).

Figure 8 UK spend and number of UK qualifying animated television productions, 2016-2020



	2016	2017	2018	2019	2020
UK spend domestic UK (£ million)	73.4	50.8	23.5	33.8	16.2
UK spend co-production and inward investment (£ million)	41.4	38.6	61.3	31.8	44.8
Total UK spend	**114.8**	**89.4**	**84.8**	**65.6**	**61.0**
Number of UK domestic productions	49	49	46	33	22
Number of co-production and inward investment productions	18	13	21	15	12
Total productions	**67**	**62**	**67**	**48**	**34**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.

Data for co-production and inward investment projects have been combined to avoid disclosing budget information for individual titles.

Tax relief for animation television production was introduced in 2013.

Data updated since publication of the 2020 Statistical Yearbook.

The value and volume of children's television production, 2016-2020

The year-on-year increase in UK production spend for animation productions was repeated in children's television production. In 2020, the total UK production spend of UK qualifying children's television projects was £102 million, an increase of £16 million (19%) on the 2019 total of £86 million. In the years between 2016 and 2019 domestic UK children's television projects accounted for the majority of UK production value, with an average share of 76% of total UK spend. In 2020, for the first time, inward investment and co-production projects accounted for the largest share of UK spend (59%) with a value of £60 million. This is the largest UK spend associated with inward investment and co-production children's television projects since the tax relief for children's television was introduced in 2015. The UK spend of domestic UK children's television productions in 2020 was £42 million compared with £71 million in 2019 (-41%).

Table 19 UK spend of UK qualifying children's television productions, 2016-2020 (£ million)

	2016	2017	2018	2019	2020
UK spend domestic UK (£ million)	44.3	50.6	93.5	71.2	41.9
UK spend co-production and inward investment (£ million)	21.5	23.5	23.9	14.8	60.3
Total UK spend	**65.8**	**74.1**	**117.4**	**86.0**	**102.2**

Source: BFI
Notes:
Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.
Figures relate to children's television productions which were certified as British before the end of 2020.
Data for co-production and inward investment projects have been combined to avoid disclosing budget information for individual titles.
Tax relief for children's television production was introduced in 2015.
Figures may not sum to totals due to rounding.
Data updated since publication of the 2020 Statistical Yearbook.

Table 20 shows that a total of 45 UK qualifying children's television projects went into production in 2020, 36% less than the 70 projects commencing in 2019. (The number of productions reported for the most recent years is likely to be revised upwards). Titles going into production in 2020 included *Don't Unleash the Beast* (13x30 mins), *Lagging* (10x25 mins) and *The World According to Grandpa* (25x11 mins).

Table 20 Number of UK qualifying children's television productions, 2016-2020

	2016	2017	2018	2019	2020
Number of UK domestic productions	67	70	95	c	38
Number of co-production and inward investment productions	11	7	7	c	7
Total productions	**78**	**77**	**102**	**70**	**45**

Source: BFI
See notes to Table 19.
'c' indicates the data have been suppressed due to low numbers to avoid disclosing details of individual projects.
Data updated since publication of the 2020 Statistical Yearbook.

The value and volume of video games development, 2016-2020

Table 21 shows the number of UK qualifying video games projects in development between 2016 and 2020 and their associated UK spend.

Our current production tracking indicates that in 2020, 23 games projects began development in the UK with a UK production value of £91 million. It should be noted, however, that as further data become available these figures are likely to increase substantially (see note below). UK qualifying video games which were released in 2020 included *BBC Bitesize: Junkateers, Dreams* and *The Room VR: A Dark Matter*.

Table 21 UK spend and number of UK qualifying video games, 2016-2020

	2016	2017	2018	2019	2020
UK spend (£ million)	624.5	504.4	427.1	269.5	91.4
Number of projects	315	331	260	187	23

Source: BFI
Notes:
Projects are allocated to the year development commenced.
Figures relate to video games projects which were certified as British before the end of 2020.
Data updated since publication of the 2020 Statistical Yearbook.
Due to the delay in acquiring full data on video games development, the figures for 2020 and earlier are expected to be revised upwards. In the 2020 Statistical Yearbook, for example, we reported the volume and value of 2019 UK qualifying video games as 24 projects with an associated UK spend of £33.8 million.
The tax relief for video games projects was introduced in 2014.
There are no co-production treaties for video games.

PUBLIC INVESTMENT IN FILM IN THE UK

FACTS IN FOCUS

In recognition of the economic and cultural value of film, the UK Government and national administrations provide financial support to film in the UK through a variety of channels. The biggest sources of public funding in 2019/20 were the film tax relief, the National Lottery and government grant-in-aid.

- Total estimated public funding available for film in the UK in 2019/20 was £714 million, down 6% from £763 million in 2018/19.
- The principal sources of public funding were the film tax relief (73%), the National Lottery (9%) and grant-in-aid (5%) from the Department for Digital, Culture, Media & Sport (DCMS).
- The European Union contributed £3.6 million to film in the UK in calendar year 2019, and a further £2.7 million to support UK film exports to other countries in Europe.
- In cash terms, dedicated funding to the UK nations was greatest in England but per capita investment was highest in Northern Ireland.
- Film production benefited from 78% (£596 million) of total public investment in 2019/20, followed by distribution and exhibition with 11% (£86.5 million).

Public investment in film in the UK

Public funding for film in the UK by source

Table 1 outlines the estimated levels of available public funding for film in the UK between 2017/18 and 2019/20. (The figures do not include some types of local authority, research council, higher or further education funding.)

The total public funding available for film in 2019/20 is estimated to have been £714 million, down from £763 million in 2018/19. The largest single source of public funding in the year was the UK film tax relief, which provided £522 million (73% of the total). This was followed by the National Lottery (£62 million; 9% of the total) and grant-in-aid from the Department for Digital, Culture, Media & Sport (DCMS) to the BFI and the National Film and Television School (£37 million; 5% of the total). Funding from DCMS in 2019/20 was higher than in both 2017/18 and 2018/19, reversing the downward trend of recent years.

Publicly owned national broadcasters and their film arms also made substantial investments: Film4/Channel 4 provided funding of over £25 million for UK film in 2019/20, while BBC Film/BBC provided funding of £11 million.

Investment from Arts Council England (ACE) in 2019/20 was over £17 million, continuing an upward trend from 2018/19. ACE funding includes National Portfolio investments into organisations and venues which form part of the national infrastructure for the arts alongside project awards from Grants for the Arts and other schemes.

The European Union (EU) provided investment of £3.6 million for UK film activity, of which £2.4 million came from Creative Europe's MEDIA sub-programme in 2019 and £1.2 million was via the structural funds in 2019/20. Investment from these funds, which include Interreg, the European Regional Development Fund and European Social Fund, were in the final funding tranches before the UK's exit from the EU.

Investment from the Northern Ireland Executive continued on an upward trajectory at £15.4 million in 2019/20 (£14.8 million in 2018/19) in line with the priority given to investment in film and television in Northern Ireland. Investment from the Welsh Assembly Government declined in 2019/20 to £0.5 million (from £2 million in 2018/19). This was due to a temporary absence of investment in feature film production by the Welsh Assembly Government agency Creative Wales (and equivalent funding from the Welsh Assembly Government's Creative Industries Sector Panel, out of which Creative Wales was formed in January 2020). Investment in Scotland in 2019/20 remained more or less static at £10.1 million (£10.4 million in 2018/19).

The total public sector investment made in film in 2019/20 was lower than in 2018/19 due almost entirely to a reduction in claims for UK film tax relief. (It should be noted that single productions made for streaming platforms can only claim UK high-end television tax relief.) Investment from the relief was, however, still above 2017/18 (£469 million). Similarly, the total public sector investment in 2019/20 was also higher than in 2017/18 (£634 million).

Table 1 Public funding for film in the UK by source, 2017/18 – 2019/20 (ranked by 2019/20 spend)

	2017/18		2018/19		2019/20	
Agency	£ million	%	£ million	%	£ million	%
National Lottery Distribution Fund[1]	60.7	8.5	51.5	6.7	62.2	8.7
DCMS grant-in-aid	26.1	4.0	23.3	3.1	37.4	5.2
Film4/Channel 4[2]	25.4	4.0	25.4	3.3	25.4	3.6
Arts Council England[3]	8.0	1.3	16.3	2.1	17.6	2.5
Northern Ireland Executive	13.7	2.2	14.8	1.9	15.4	2.2
BBC Film/BBC[4]	11.3	1.8	11.5	1.5	11.3	1.6
Scottish Government	3.9	0.6	10.4	1.4	10.1	1.4
Higher education funding[5]	2.7	0.4	2.7	0.4	2.8	0.4
Local government[6]	2.4	0.4	2.4	0.3	2.7	0.4
Creative Europe MEDIA sub-programme[7]	4.4	0.7	3.5	0.5	2.4	0.3
Department for Education[8]	0.0	-	1.0	<0.1	1.5	0.2
Other EU[9]	1.0	0.2	0.6	0.1	1.2	0.2
Welsh Assembly Government	3.5	0.6	2.0	0.3	0.5	0.1
Foreign & Commonwealth Office	1.1	0.2	0.9	0.1	0.8	0.1
Department for International Trade	0.2	<0.1	0.2	<0.1	0.2	<0.1
National and regional development agencies	0.1	<0.1	0.1	<0.1	0.2	<0.1
Other public sector[10]	<0.1	<0.1	0.0	-	<0.1	<0.1
Department for Business, Energy & Industrial Strategy	<0.1	<0.1	0.0	-	0.0	-
Total public sector selective investment[11]	**165.4**	**26.1**	**168.2**	**22.0**	**192.0**	**26.9**
UK film production tax relief	469.0	73.9	595.0	78.0	522.0	73.1
Total public sector selective and automatic	**634.4**	**100.0**	**763.2**	**100.0**	**714.0**	**100.0**

Source: Named funding sources, Creative Cultural Associates analysis

Notes:

[1] Allocations to BFI, Creative Scotland, Northern Ireland Screen, Ffilm Cymru Wales and Heritage Lottery Fund awards to film projects.

[2] Includes Film4 direct investment in film production and Channel 4 investment in the National Film and Television School (NFTS).

[3] Includes ACE National Lottery investments (for example from Grants for the Arts) into moving image projects, plus National Portfolio Organisation investments attributable to film and the moving image, based on ACE calculations.

[4] Includes BBC Film's direct investment in film production, BBC investment in the NFTS and film production schemes.

[5] This comprises Higher Education establishment-derived support for film archives and the NFTS. It does not include payments from educational funding councils to other film courses (film studies, etc) in higher or further education.

[6] Investment by local authorities in regional film archives, Creative England, Screen Yorkshire and Film London.

[7] The figures are for calendar years 2017-2019 and cover film investments only; they do not include the awards to non-British sales agents and distributors handling UK film exports to the EU reported in Table 2. Data provided in Euros and converted to British pounds. Exchange rates: 2017 €1 = £0.89; 2018 €1 = £0.89; 2019 €1 = £0.88.

[8] Includes funding from the Office for Students to the NFTS.

[9] Residual funding from Interreg, European Social Fund, European Regional Development Fund.

[10] Very small awards (under £10,000) from a range of public sector agencies made to national screen agencies.

[11] Does not include transfers to and from reserves or earned/self-generated income.

Data updated since publication of the 2020 Statistical Yearbook.

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

Spend by agency

As in previous years, HMRC was the largest net spender on film in 2019/20 (£522 million for film tax relief), followed by the BFI (£106 million), Film4/Channel 4 (£25 million), Arts Council England (£17 million), the Scottish agencies (£17 million), Northern Ireland Screen (£16 million) and the National Film and Television School (£16 million – this figure includes income from student grants).

Table 2 Net film spend by agency, 2019/20

	£ million	%
HM Revenue	522.0	68.5
BFI	106.2	13.9
Film4/Channel 4	25.0	3.3
Arts Council England[1]	17.0	2.2
Scottish agencies[2]	16.8	2.2
Northern Ireland Screen	16.3	2.1
NFTS	16.2	2.0
BBC Film/BBC	11.0	1.4
Into Film	6.3	0.8
ScreenSkills	5.8	0.8
Film London	5.6	0.7
Creative Europe MEDIA sub-programme[3]	5.2	0.7
Creative England	2.9	0.4
Screen Yorkshire, Screen South and Northern Film + Media	2.9	0.4
English regional film archives[4]	2.2	0.3
Welsh agencies[5]	1.9	0.2
British Council	0.8	0.1
Heritage Lottery Fund	0.6	0.1
Total public agencies[6]	**764.4**	**100.0**

Source: Named funding sources, Creative Cultural Associates analysis

Notes:

Net spend means spend after deducting grants and awards to other organisations in this table. Figures are presented net to avoid double counting. Spend includes earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves as well as income derived from public sector sources.

[1] Includes ACE National Lottery investments (for example from Grants for the Arts) into moving image projects, plus National Portfolio Organisation investments attributable to film and the moving image, based on ACE calculations.

[2] Includes film expenditure on the part of Creative Scotland and the National Library of Scotland Moving Image Archive.

[3] Investment for the calendar year 2019. Includes £2.7 million granted in support of UK films exported to the EU through schemes providing grants to non-UK distributors and sales agents handling British titles. Data provided in Euros and converted to British pounds. Exchange rate €1 = £0.88.

[4] Includes East Anglian Film Archive, Media Archive for Central England (MACE), North West Film Archive, Screen Archive South East, South West Film and Television Archive and Yorkshire Film Archive.

[5] Includes expenditure from Ffilm Cymru Wales and the Film Archive of Wales (part of the National Library of Wales) and direct investments by the Welsh Assembly Government.

[6] The spending tabulated above includes net transfers to and from reserves and spending financed by commercial income (e.g. from film rights) earned by agencies. For these reasons the total net spending by agencies (£764.4 million) is higher than total public funding for film in the 2019/20 year (£714.0 million, Table 1).

Activities supported by public spending on film

Table 3 describes the areas of activity supported by public spend on film in the UK between 2017/18 and 2019/20. Production has consistently benefited from the largest share of public investment, the majority of which derives from the automatic funding available through the film tax relief. In 2019/20, film production accounted for £596 million (78% of the total). In the same financial year, distribution and exhibition benefited from the second largest share of public spending at 11% (£86.5 million) while training and skills activity received 4% of total public spend (£31 million).

Table 3 Activities supported by public spend on film, 2017/18 - 2019/20 (ranked by 2019/20 spend)

	2017/18		2018/19		2019/20	
	£ million	%	£ million	%	£ million	%
Production[1]	548.1	79.0	680.5	82.8	596.3	78.1
Distribution and exhibition	69.7	10.0	67.1	8.2	86.5	11.3
Training and skills[2]	26.2	3.8	28.3	3.4	30.9	4.0
Education, young people and lifelong learning	8.7	1.3	10.7	1.3	12.0	1.6
Development	6.1	0.9	11.5	1.4	11.8	1.5
Export and inward investment promotion[3]	12.5	1.8	7.0	0.8	8.4	1.1
Administration and services to the public	10.7	1.5	5.3	0.6	7.0	0.9
Film archives and heritage[4]	8.4	1.2	5.3	0.6	6.2	0.8
Business support[5]	3.0	0.4	6.2	0.8	5.2	0.7
Total[6]	**693.7**	**100.0**	**821.8**	**100.0**	**764.4**	**100.0**

Source: Creative Cultural Associates
Notes:
[1] Non-tax break production spend in 2019/20 was £74.1 million.
[2] Skills Investment Fund, National/Regional Screen Agency training investment.
[3] British Film Commission, British Council, locations services in the nations and regions.
[4] BFI National Film and Television Archive, national/regional screen archives, Heritage Lottery Fund investments.
[5] National/regional screen agency investment: primary beneficiaries are independent production companies.
[6] 2019/20 total expenditure (£764.4 million) was greater than total public funding (£715.8 million) as expenditure was supplemented by earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves.
Data updated since publication of the 2020 Statistical Yearbook.
Figures/percentages may not sum to totals due to rounding.

Image: *ear for eye* © Charlie Gray 2020

Spend across the UK nations

Many sources of public investment for film, such as the production tax relief, are intended for the benefit of the industry throughout the UK. However, some sources of funding are particular to the individual UK nations (e.g. investment from Ffilm Cymru Wales, Creative Scotland and Northern Ireland Screen). Table 4 shows the level of investment dedicated to each of the UK nations in 2019/20. In cash terms, England received the greatest level of funding with £33 million. In per capita terms, however, the level of investment in Northern Ireland was the highest at £8.58 per person, almost three times the level in Scotland, which had the next highest spend per person at £3.11. Wales and England had far lower levels of per capita spend at £0.62 and £0.60 respectively.

Table 4 Investment in film in the UK nations 2019/20 (ranked by total dedicated investment)

	Total dedicated investment (£ million)	Population (million)	£ per capita
England[1]	33.2	55.3	0.60
Scotland[2]	16.8	5.4	3.11
Northern Ireland[3]	16.3	1.9	8.58
Wales[4]	1.9	3.1	0.62

Source: Creative Cultural Associates, Office for National Statistics
Notes:
[1] Includes Creative England, English regional screen agencies, English regional screen archives and Arts Council England.
[2] Includes Creative Scotland, Scottish Screen Archive.
[3] Northern Ireland Screen.
[4] Includes Ffilm Cymru Wales, Wales Film Archive and Welsh Assembly Government direct expenditure.

Creative Europe investment in the UK

Creative Europe is the European Union's support programme for the cultural and audiovisual sectors. It was launched in January 2014 with a budget of €1.5 billion (approximately £1.3 billion) for the period 2014-2020, and follows on from the previous Culture and MEDIA programmes. With the impact of the UK's exit from the EU, it is likely that 2019 was the final year in which substantial investments from Creative Europe would be available to UK companies and agencies.

Creative Europe's MEDIA sub-programme supports European film and other audiovisual industries by funding the development, promotion and distribution of European works. In 2019, the MEDIA sub-programme invested £2.4 million in UK-based film activity; over 60% of this (£1.5 million) supported film distribution schemes (Table 5).

In addition to this, £2.7 million was invested in support of UK films exported to other countries in the EU through schemes providing grants to non-UK distributors and sales agents handling UK titles.

Table 5 Creative Europe MEDIA sub-programme investment in film in the UK, 2019

Activity area	MEDIA scheme(s)	£ million	%
Distribution	Selective, automatic, sales agents and online	1.5	64.0
Development	Single project and slate	0.4	16.8
Training and skills	Training	0.4	16.3
Exhibition	Film festivals, Europa Cinemas	0.1	2.9
Total		**2.4**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis
Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.88.

The MEDIA sub-programme also supports UK television and new media. UK video games development benefited from £400,000 in 2019, while £1.3 million was invested in television production (Table 6).

Table 6 Creative Europe MEDIA sub-programme investment in television and new media in the UK, 2019

Activity area	MEDIA scheme(s)	£ million	%
TV Production	TV programming	1.3	77.0
Development: new media	Video games	0.4	23.0
Total		**1.7**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis
Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.88.

BFI National Lottery awards 2020

Table 7 shows the National Lottery awards made by the BFI in 2020. There were 527 awards in total with a combined value of £57 million.

Table 7 BFI National Lottery awards, 2020 (ranked by total value)

	Number of awards	Total value (£ million)
Future talent	385	29.8
Future audiences	95	14.9
Future learning & skills	37	11.5
Leadership, Research, Certification and Delivery	10	0.4
Total	**527**	**56.7**

Source: BFI
Note: BFI awards data are for calendar year 2020.
'Future talent' includes awards relating to support for filmmakers and business support, 'Future audiences' includes awards for Film Audience Network, audience development and heritage, and 'Future learning & skills' includes awards for Into Film and BFI Film Academy, amongst others. More can be read about these awards at https://www.bfi.org.uk/strategy-policy/policy-statements/bfi2022

A total of 15 films were awarded project funding of £250,000 or over from the BFI in 2020 (Table 8). Seven films received funding of over £1 million. (The value of awards listed in the table includes all funding for individual projects in 2020, and may comprise separate awards for development, pre-production, production, distribution, and the Step Up programme, which aims to improve the lack of diversity in film crews by providing opportunities for under-represented groups to work on productions supported by the BFI Film Funds.)

Table 8 Large awards (£250,000+) for film made by the BFI, 2020, ranked by total value of awards

Project	Total value of awards (£ million)
Kensuke's Kingdom	1.76
Benediction	1.73
Pirates	1.50
True Things	1.42
Boxing Day	1.42
The Phantom of the Open	1.39
Mothering Sunday	1.23
Medusa Deluxe	0.97
Earwig	0.95
Brian and Charles	0.93
Ballywalter	0.90
Vibes & Stuff	0.74
ear for eye	0.61
The Origin	0.44
Triangle of Sadness	0.43

Source: BFI
Note: BFI awards data are for calendar year 2020.

Leading public investors in British film production, 2018-2020

Table 9 shows the leading providers of public agency and public service broadcaster investment in UK films for the calendar years 2018-2020. The public investor involved with the greatest number of films over the period was the BFI with 68 projects (combined budget £176 million) while projects backed by Creative Scotland had the highest combined budget (£411 million) thanks to a small number of high budget productions such as *1917* and *Fast & Furious 9*. These budget figures are for the total budget of the films, including the share of budget provided by other public investors, private investors and pre-sales.

Table 9 Leading public investors in British film production, 2018-2020, ranked by number of films

Public funder	Number	Estimated budget (£ million)	Selected titles
BFI	68	176	ear for eye; Mothering Sunday; The Phantom of the Open
BBC Films/BBC	48	131	Benediction; His House; Judy
European agencies*/Creative Europe	28	83	Mrs Harris Goes to Paris; Recovery; Triangle of Sadness
Creative Scotland	24	411	1917; Fast & Furious 9; Our Ladies
Film4/Channel 4	24	129	Censor; Everybody's Talking About Jamie; The Father
Northern Ireland Screen	21	231	Artemis Fowl; Belfast; The Northman
Welsh agencies/S4C/Welsh Assembly Government	17	24	Dream Horse; L.O.L.A.; Six Minutes to Midnight
Screen Ireland**/Broadcasting Authority of Ireland	13	26	Rialto; Stranger with a Camera; Wildfire
English regional screen agencies	11	25	The Duke; Mari; StarDog and TurboCat
Creative England	8	10	After Love; Perfect 10; The Power

Source: BFI production tracking

Notes:

In some cases more than one public agency contributed funding to the same film, so there is double counting of budgets and hence no total budget row.

* Examples of 'European agencies' include Le Centre national du cinéma et de l'image animée, Deutscher Filmförderfonds and Film Fund Luxembourg.

** Screen Ireland was formerly known as the Irish Film Board.

FILM EDUCATION AND INDUSTRY EMPLOYMENT

Cover image: *Rocks* courtesy of Altitude Film Distribution

FACTS IN FOCUS

Film education offers children and young people the opportunity to develop a lifelong relationship with film through watching, understanding and making films. For some, it will be a key stepping stone to the development of a career in the film industry. In 2020, 86,000 people were employed in the industry, the third highest figure since 2011.

- In 2020/21, Into Film supported over 17,500 film clubs across the UK; there were over 135,000 downloads of the organisation's film education resources by teachers and educators.
- In 2020/21, just under 38,300 students were entered for GCSE/Scottish National Level 4/5 film and media related courses (down from just over 40,200 in 2019/20) and 22,200 students were entered for GCE A Level/Scottish National Level 6 film and media related courses (down from just under 22,900 in 2019/20).
- In 2019/20 (the last year for which data are available), just under 29,200 students were enrolled in higher education film and media related courses (up from just under 23,800 in 2018/19).
- In 2020/21, 855 talented 16-19 year olds gained filmmaking experience through the BFI Film Academy programme.
- In 2020, around 86,000 people worked in the UK film industry, of whom 66,000 worked in film and video production.
- Women made up 26% of screenwriters of UK films released in the UK and Republic of Ireland in 2020 and 23% of directors.
- In 2020, 48% of those engaged in film and video production were self-employed compared with 14% of the total UK workforce.
- In 2020, 57% of the UK film and video production workforce was based in London and the South East, compared with 30% of the total UK workforce.
- Most film industry businesses had low numbers of employees, in particular those involved in film and video production, where 97% of workplaces employed 10 people or fewer.

Film education and industry employment

Learning about and through film

Film education takes place in both formal and informal settings, from schools and colleges to voluntary interest groups like youth clubs and film societies. Film is a rich and versatile medium for exploring subjects in the classroom and elsewhere, as well as a worthwhile and rewarding object of study in its own right.

The BFI continues to work with a range of partners in the private, cultural and education sectors to help forge an overarching strategy for film education in the UK. The plan is rooted in the belief that in the new digital landscape, the moving image should be acknowledged as having the same educational value as the printed text, and that film should be integrated into all forms of education, learning, training, cultural appreciation and understanding. The plan also calls for the creation of clear progression paths, both for future audiences as they develop a passion for film, and for the talented young people who will go on to develop careers in the film industry.

Film education in formal education settings

In practice, film education activity has traditionally involved watching and listening to a range of film texts, discussing and analysing them; generating discursive and written work, storyboards and scripts; making films; and re-purposing archive material. Outside of dedicated film and media studies courses, film is also used in other parts of the curriculum, such as science, English or modern languages.

The creation of the charity Into Film in 2013 represented one of the largest ever investments in film education for the formal sector in the UK. Supported by significant National Lottery investment from the BFI, Into Film's core role is to make film an integrated part of education for every child and young person in the UK. This is done primarily through providing film-based materials to support the current curriculum and providing resources for watching, making and learning about film within its network of schools' film clubs. (Film clubs supported by Into Film also operate in non-school settings such as youth clubs, cinemas and libraries.)

In 2020, when the COVID-19 pandemic forced the closure of cinemas and schools, Into Film provided resources and training opportunities to support virtual teaching and home learning. It developed more curriculum-linked resources, made a number of member-facing filmmaking activities free to all, offered news and articles on home learning and showed how to adapt its resources, including film clubs, to the lockdown environments.

As schools gradually re-opened, Into Film launched two major products to facilitate teacher training and film watching: a platform to host online courses, and a streaming service, Into Film+, designed exclusively for schools, which began beta testing during the year.

In 2020/21, teachers and educators accessed Into Film's resources over 135,000 times. The number of registered film clubs increased over the year, rising from 16,125 in 2019/20 to 17,544 in 2020/21 (Table 1).

The annual Into Film Festival, a UK-wide programme of free film screenings and related activities for children and young people, was not held in 2020 due to pandemic restrictions.

Table 1 National/regional distribution of registered film clubs, 2019/20 and 2020/21 (ranked by number of clubs registered in 2020/21)

	2019/20		2020/21	
Nation/region	Number of film clubs	% of film clubs	Number of film clubs	% of film clubs
England	12,611	78.2	13,812	78.7
London	2,276	14.1	2,516	14.3
South East	1,889	11.7	2,158	12.3
North West	1,775	11.0	1,866	10.6
East of England	1,219	7.6	1,483	8.5
South West	1,389	8.6	1,442	8.2
West Midlands	1,325	8.2	1,439	8.2
Yorkshire and The Humber	1,098	6.8	1,164	6.6
East Midlands	1,058	6.6	1,129	6.4
North East	582	3.6	615	3.5
Scotland	1,479	9.2	1,610	9.2
Wales	1,046	6.5	1,118	6.4
Northern Ireland	989	6.1	1,004	5.7
Total	**16,125**	**100.0**	**17,544**	**100.0**

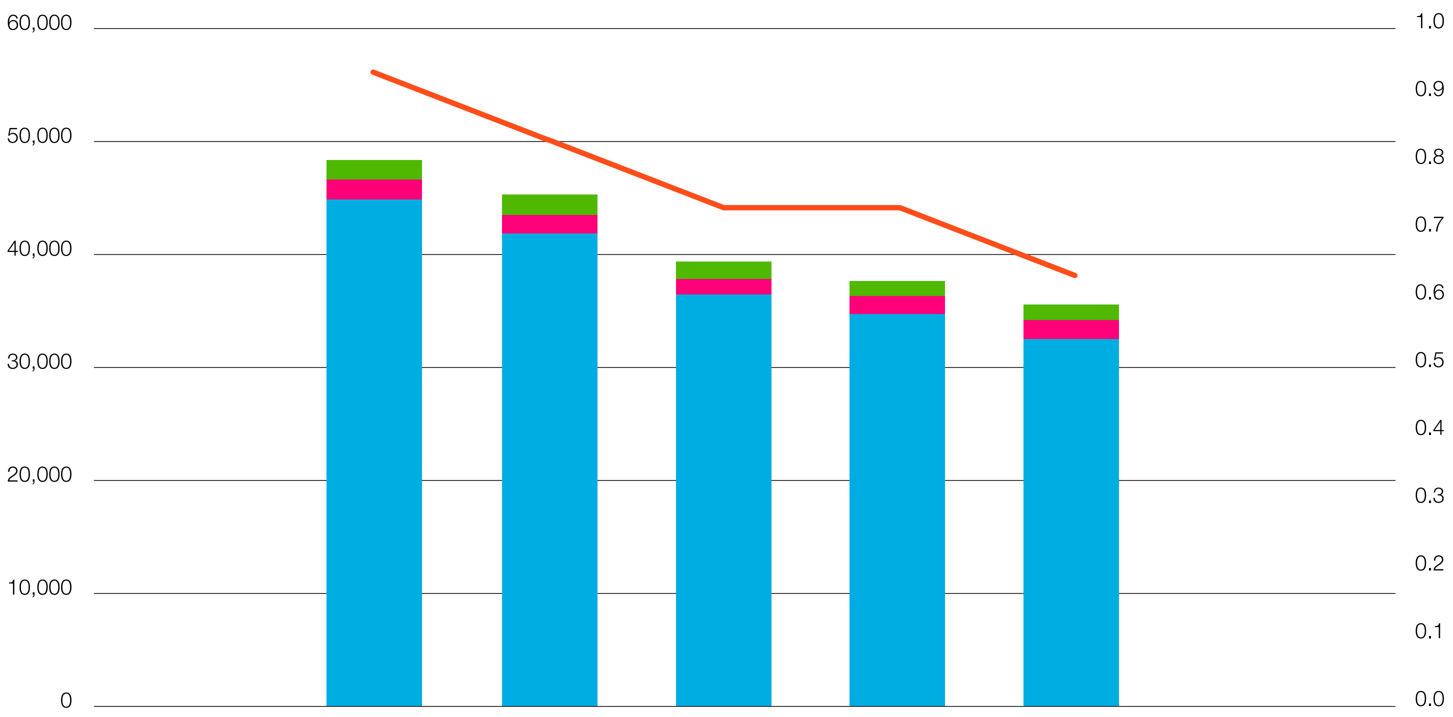
Source: Into Film
Notes:
The data presented here include active film clubs only.
Percentages may not sum to subtotals due to rounding.

Image: *Misbehaviour* courtesy of Pathé UK

Figures 1 to 6 show the number of students entered for examinations in film and media specific subjects taught in schools and colleges across the UK between 2016/17 and 2020/21.

In line with an overall decline in the numbers of students being entered for creative arts subjects at GCSE level in recent years, the take-up of screen and media related subjects has continued to fall. As Figure 1 shows, there has been a 27% decrease in the total number of students entering GCSE Media, Film or TV Studies in England, Wales and Northern Ireland since 2016/17, compared with a 6% increase in overall GCSE entries. Total Media, Film or TV Studies entries in 2020/21 were 35,564, which equates to just over 0.6% of all GCSE entries, the lowest share of the five-year period.

Figure 1 Entries for GCSE Media/Film/TV Studies in England, Wales and Northern Ireland, 2016/17-2020/21

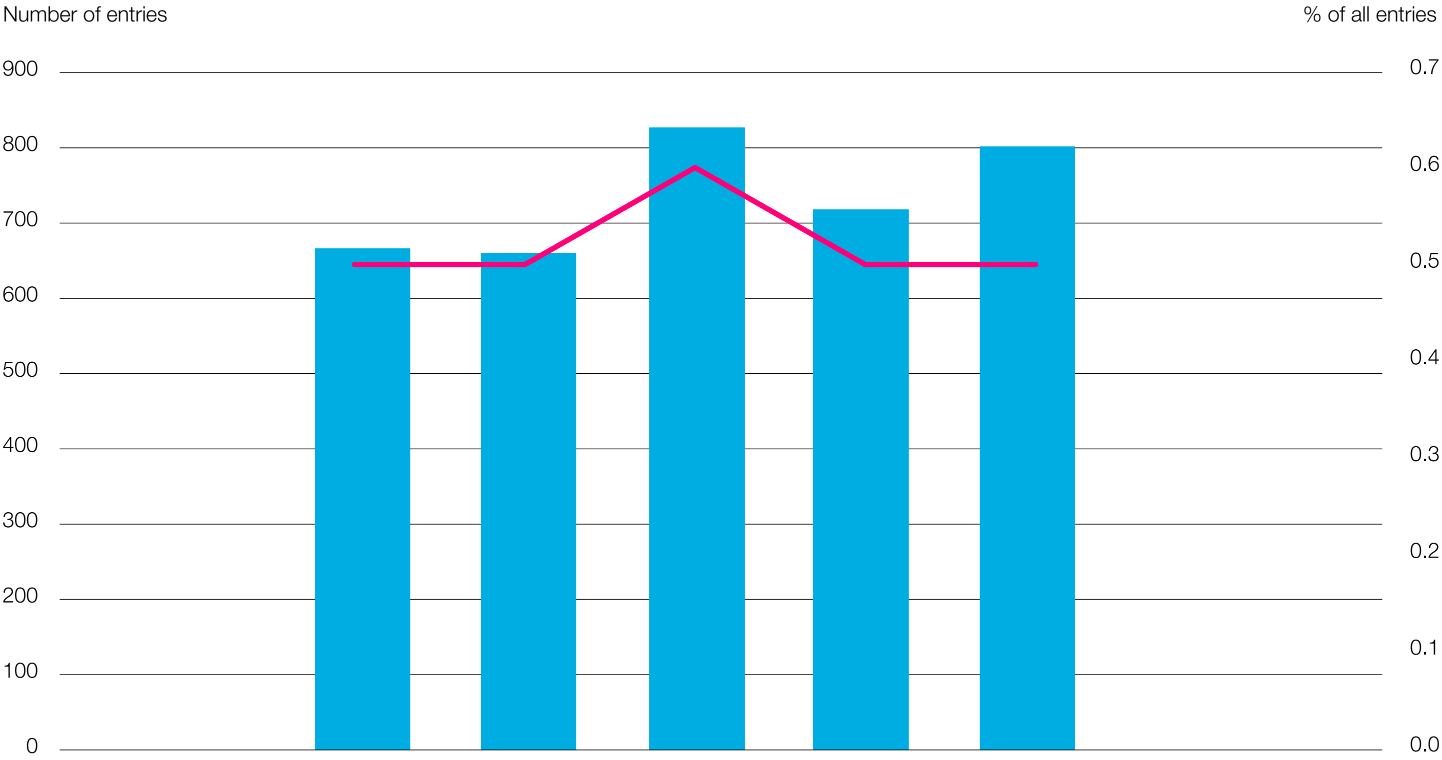


	2016/17	2017/18	2018/19	2019/20	2020/21	% change 2019/20 2020/21	% change 2016/17 2020/21
Northern Ireland	1,717	1,789	1,529	1,366	1,392	1.9	-18.9
Wales	1,780	1,663	1,416	1,594	1,644	3.1	-7.6
England	44,865	41,832	36,437	34,711	32,528	-6.3	-27.5
Total	**48,362**	**45,284**	**39,382**	**37,671**	**35,564**	**-5.6**	**-26.5**
All GCSE entries	5,443,072	5,470,076	5,547,447	5,692,464	5,745,945	0.9	5.6
Media/Film/TV Studies as % of all entries	0.9	0.8	0.7	0.7	0.6	-	-

Source: Joint Council for Qualifications (JCQ)
Note: Scotland is not included because of its separate examinations system.

In contrast with the previous chart, Figure 2 shows the relative stability of entries for Northern Ireland's GCSE in Moving Image Arts as a percentage of overall GCSE entries in Northern Ireland. Entries for the qualification rose from 718 in 2019/20 to 802 in 2020/21, the second highest total of the period.

Figure 2 Entries for GCSE Moving Image Arts in Northern Ireland, 2016/17-2020/21

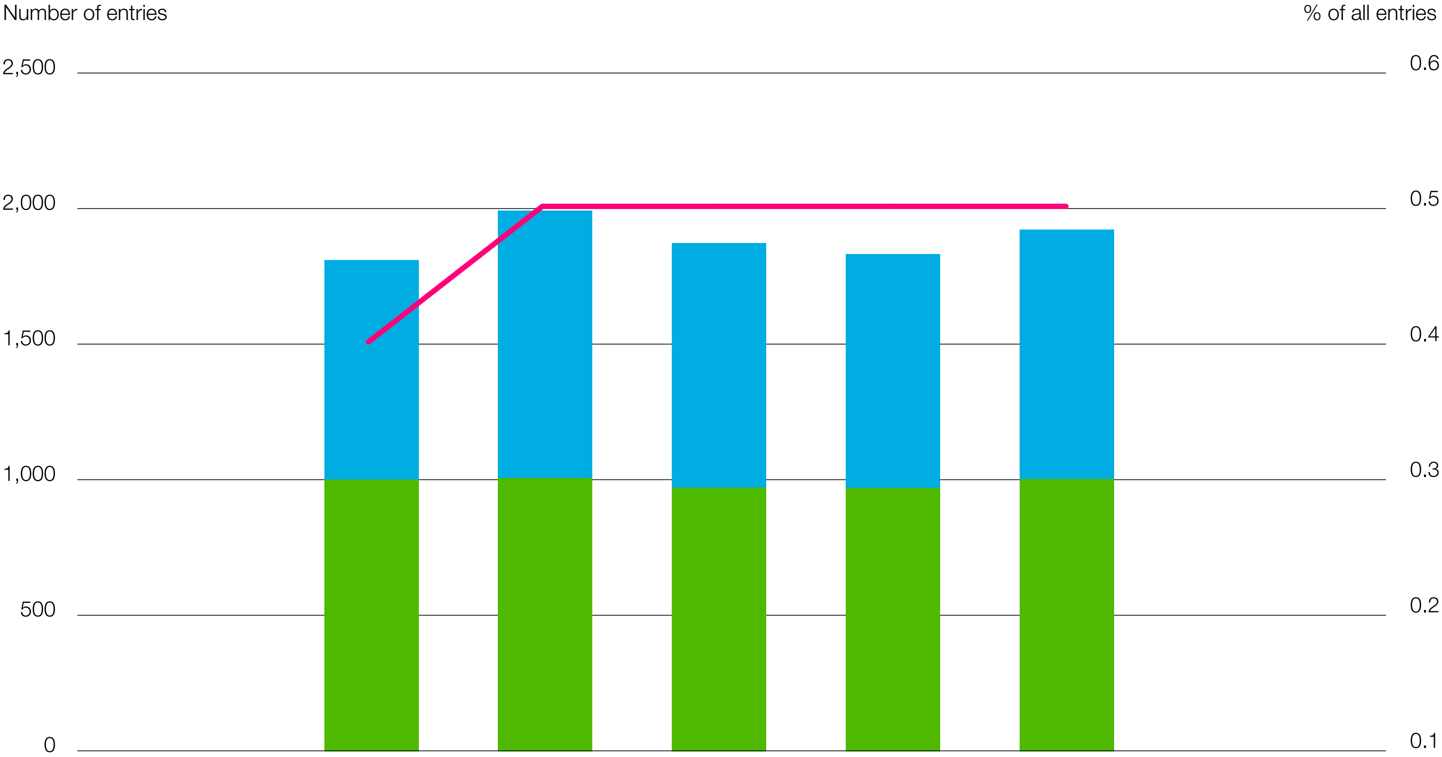


	2016/17	2017/18	2018/19	2019/20	2020/21	% change 2019/20 2020/21	% change 2016/17 2020/21
GCSE Moving Image Arts entries	666	660	827	718	802	11.7	20.4
All GCSE entries in Northern Ireland	137,486	146,451	140,734	141,039	161,447	14.5	17.4
Moving Image Arts as % of all entries	0.5	0.5	0.6	0.5	0.5		

Source: Council for the Curriculum, Examinations and Assessment (CCEA)

In total, there were 1,924 entries for Scottish National Levels 4 and 5 Media Studies in 2020/21, a 5% increase compared with 2019/20 (1,833 entries), and an increase of 6% compared with 2016/17 (1,811). As with the Moving Image Arts GCSE in Northern Ireland, entries for Scottish National Level 4/5 Media Studies as a percentage of all equivalent qualifications have plateaued over the period (Figure 3).

Figure 3 Entries for Scottish National Level 4/5 Media Studies, 2016/17-2020/21

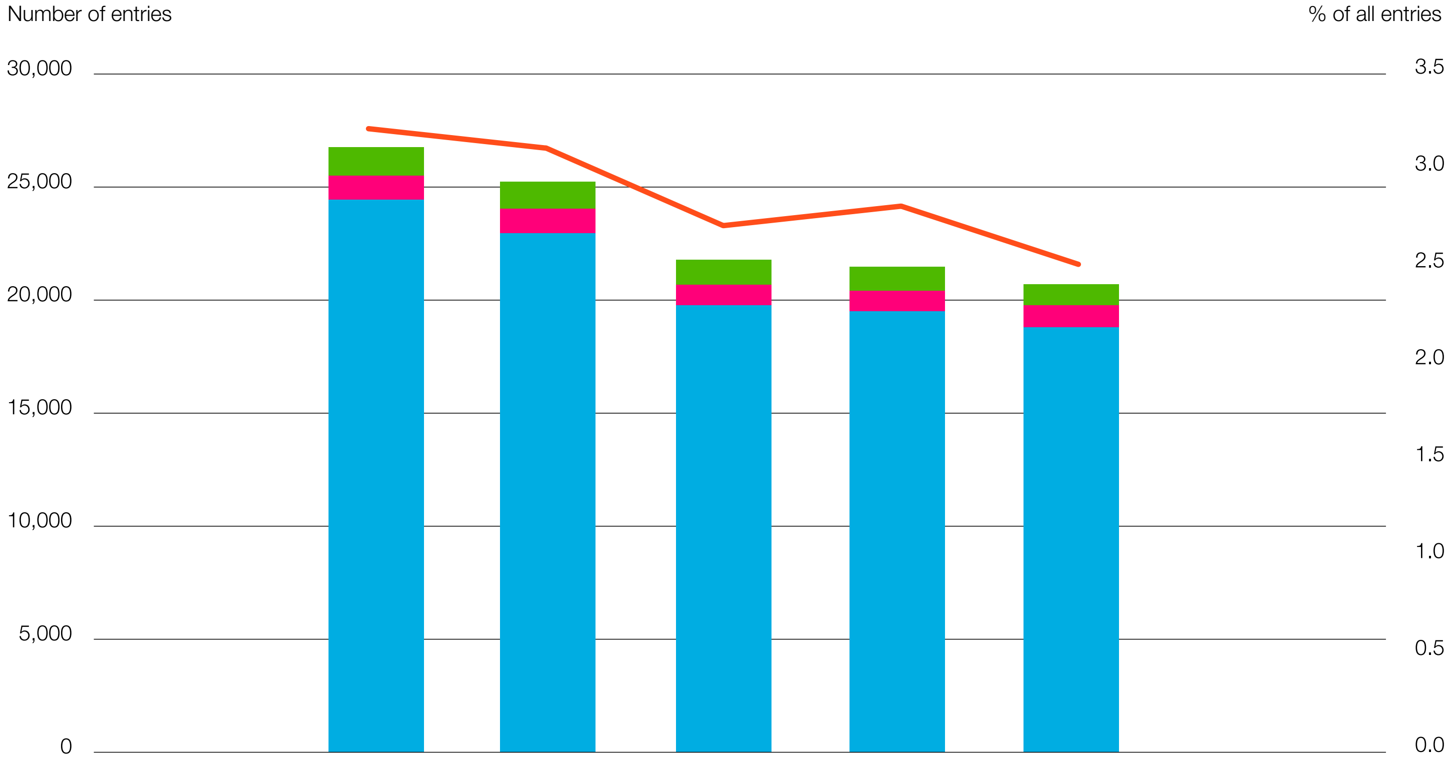


	2016/17	2017/18	2018/19	2019/20	2020/21	% change 2019/20 2020/21	% change 2016/17 2020/21
National Level 4 Media Studies entries	808	987	902	862	919	6.6	13.7
National Level 5 Media Studies entries	1,003	1,007	972	971	1,005	3.5	0.2
Total	**1,811**	**1,994**	**1,874**	**1,833**	**1,924**	**5.0**	**6.2**
National Level 4 entries	116,032	106,033	104,866	103,596	104,378	0.8	-10.0
National Level 5 entries	293,220	281,785	288,552	300,639	297,973	-0.9	1.6
Total all entries	**409,252**	**387,818**	**393,418**	**404,235**	**402,351**	**-0.5**	**-1.7**
Media Studies as % of all entries	0.4	0.5	0.5	0.5	0.5	-	-

Source: Scottish Qualifications Authority (SQA)

The total number of students taking GCE A Level Media, Film or TV Studies in England, Wales and Northern Ireland decreased by 23% between 2016/17 (26,773 entries) and 2020/21 (20,701), compared with a fall of 0.4% in all equivalent entries (Figure 4). At 2.5%, entries for Media, Film or TV Studies as a percentage of entries for all GCE A Levels in 2020/21 were lower than for any other year in the period.

Figure 4 Entries for GCE A Level Media/Film/TV Studies in England, Wales and Northern Ireland, 2016/17-2020/21

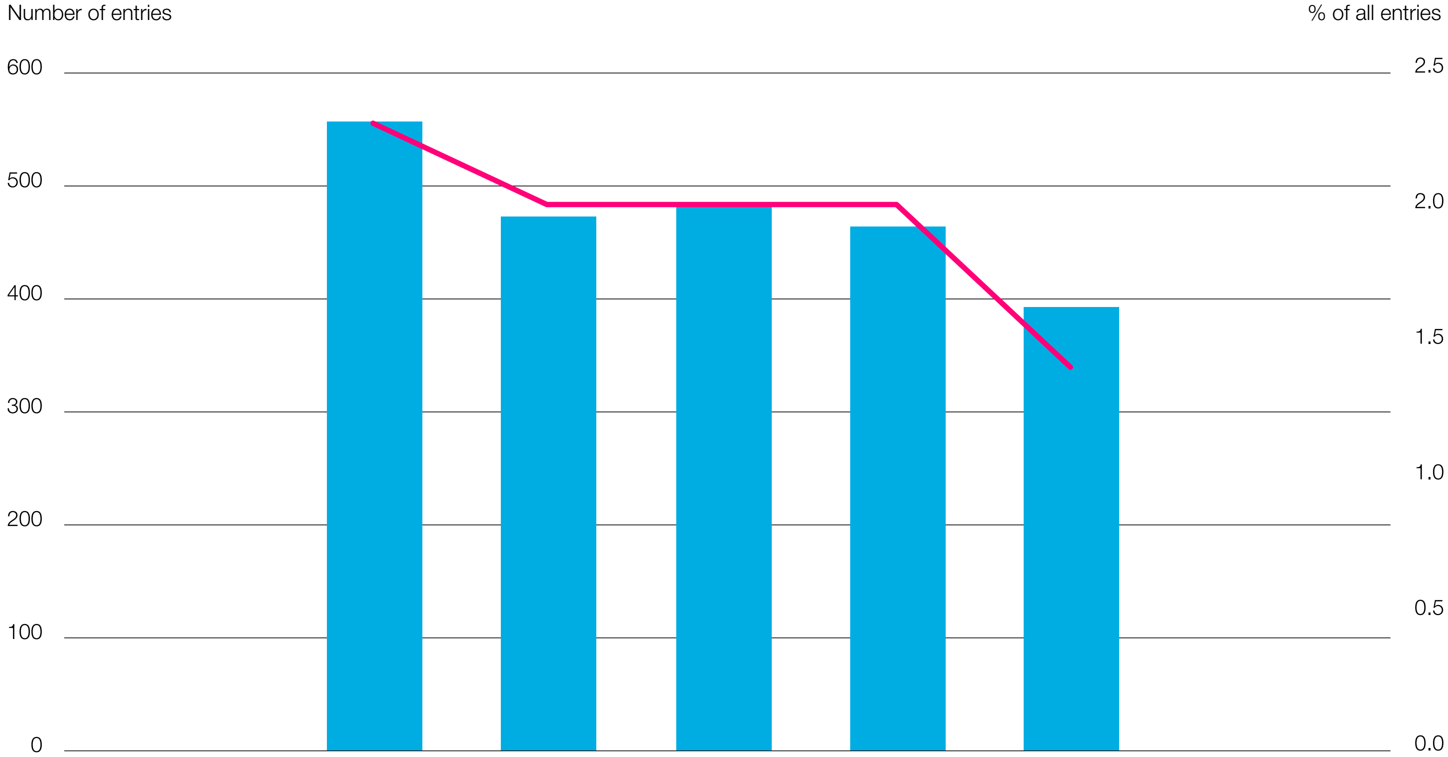


	2016/17	2017/18	2018/19	2019/20	2020/21	% change 2019/20 2020/21	% change 2016/17 2020/21
Northern Ireland	1,275	1,207	1,091	1,067	934	-12.5	-26.7
Wales	1,048	1,065	919	894	957	7.0	-8.7
England	24,450	22,968	19,765	19,517	18,810	-3.6	-23.1
Total	**26,773**	**25,240**	**21,775**	**21,478**	**20,701**	**-3.6**	**-22.7**
All GCE A Level entries	828,355	811,776	801,002	781,029	824,718	5.6	-0.4
Media/Film/TV Studies as % of all entries	3.2	3.1	2.7	2.8	2.5	-	-

Source: Joint Council for Qualifications (JCQ)
Note: Scotland is not included because of its separate examinations system.

As Figure 5 shows, the annual number of entries for the GCE A Level in Moving Image Arts in Northern Ireland fluctuated between 2016/17 and 2020/21 but the general trend was downward. Entries for the qualification in 2020/21 (393 entries) were 29% lower compared with 2016/17 (557) while overall GCE A Level entries increased by 11% over the same period.

Figure 5 Entries for GCE A Level Moving Image Arts in Northern Ireland 2016/17-2020/21

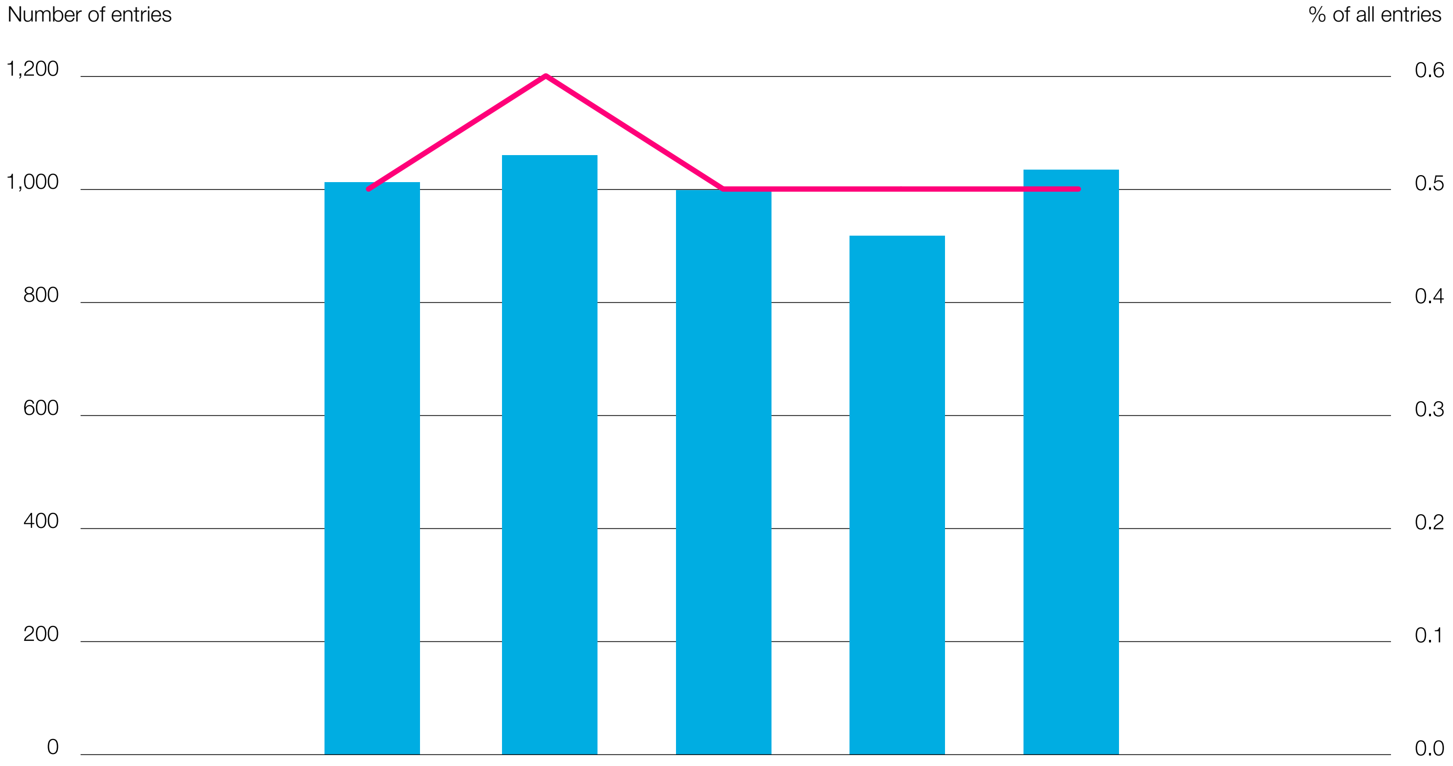


	2016/17	2017/18	2018/19	2019/20	2020/21	% change 2019/20 2020/21	% change 2016/17 2020/21
GCSE Moving Image Arts entries	557	473	482	464	393	-15.3	-29.4
All GCSE entries in Northern Ireland	24,726	23,737	23,867	23,583	27,429	16.3	10.9
Moving Image Arts as % of all entries	2.3	2.0	2.0	2.0	1.4	-	-

Source: Council for the Curriculum, Examinations and Assessment (CCEA)

As Figure 6 shows, there were 1,035 entries for Scottish National Level 6 Media Studies in 2020/21, a rise of 13% compared with 2019/20 (918 entries) and up 2% compared with 2016/17 (1,013). As a percentage of all equivalent entries over the period, Media Studies entries have remained fairly constant at around 0.5%.

Figure 6 Entries for Scottish National Level 6 Media Studies, 2016/17-2020/21



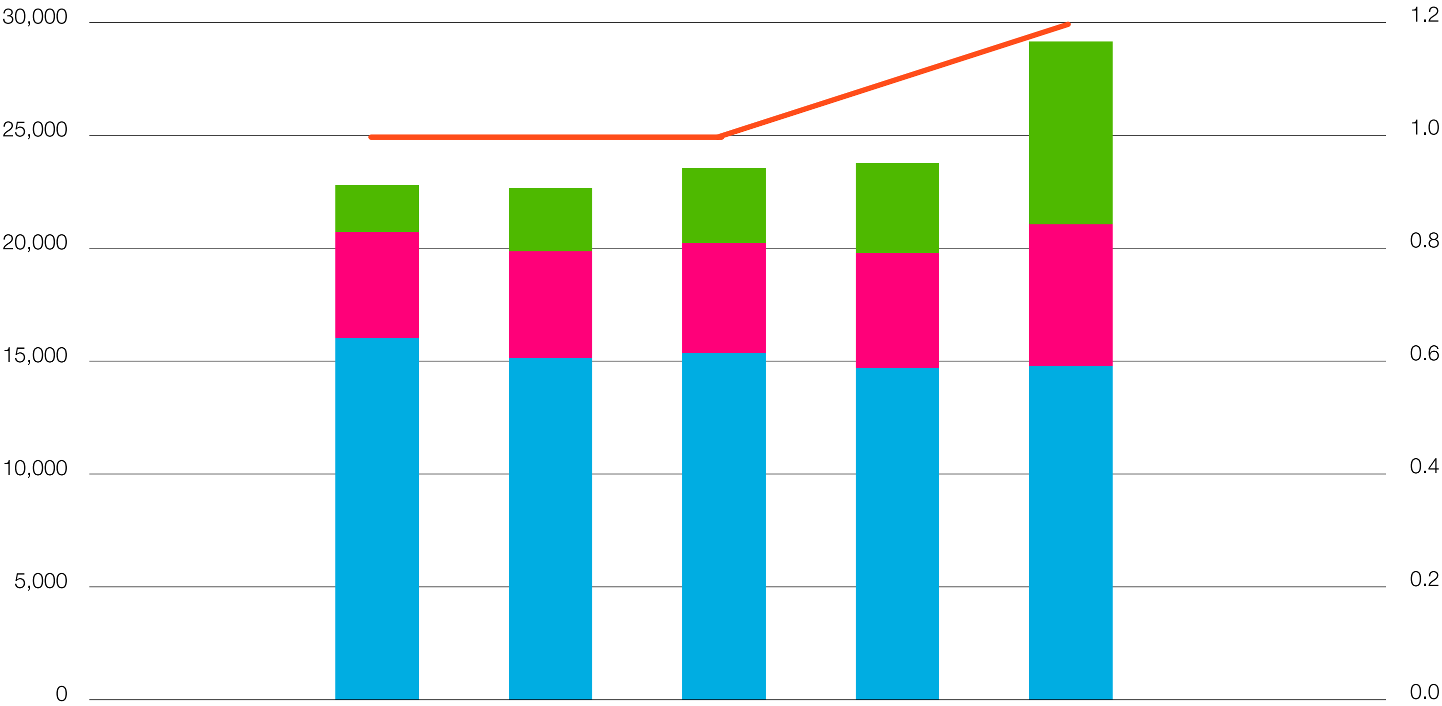
	2016/17	2017/18	2018/19	2019/20	2020/21	% change 2019/20 2020/21	% change 2016/17 2020/21
National Level 6 Media Studies entries	1,013	1,061	999	918	1,035	12.7	2.2
All National Level 6 entries	194,813	191,951	185,914	186,214	194,661	4.5	-0.1
National Level 6 Media Studies as % of all entries	0.5	0.6	0.5	0.5	0.5	-	-

Source: Scottish Qualifications Authority (SQA)

Study of the moving image and allied creative industries remains popular in UK higher education through Media Studies, Film Studies and Film Production courses. In 2019/20 (the latest year for which data are available), 29,155 students were enrolled on these courses, a rise of 28% compared with 2015/16 (22,800). It should be noted, however, that while Figure 7 shows a significant increase in entries for Film Production courses between 2018/19 and 2019/20 (up from 3,995 to 8,090), this is primarily due to a change in the methodology used by the Higher Education Statistics Agency, which captures more courses than before under this category.

Overall, these film and media courses accounted for around 1% of total enrolment in higher education courses between 2015/16 and 2019/20.

Figure 7 Higher education enrolments in film and media, 2015/16-2019/20



	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 20219/20
Film Production	2,090	2,810	3,335	3,995	8,090	102.5	287.1
Film Studies	4,680	4,725	4,890	5,080	6,280	23.6	34.2
Media Studies	16,035	15,130	15,340	14,705	14,785	0.5	-7.8
Total	**22,800**	**22,665**	**23,565**	**23,780**	**29,155**	**22.6**	**27.9**
All higher education enrolments	2,280,830	2,317,880	2,343,095	2,383,970	2,532,385	6.2	11.0
% of all enrolments	1.0	1.0	1.0	1.0	1.2	-	-

Source: Higher Education Statistics Agency (HESA)
Notes:
Data have been rounded to the nearest multiple of 5.
Includes first degree, post-graduate and other degrees.
Higher education data are only currently available up to 2019/20.

Many of the film and media related courses in further and higher education are endorsed by ScreenSkills, the UK-wide strategic skills body for the screen-based creative industries, through its Select quality mark. The ScreenSkills Select programme identifies courses that have been recognised by practitioners as relevant to working in the screen industries. Currently 110 accredited courses are offered across the UK, including 59 film related courses or programmes in areas such as directing, screenwriting, post-production, sound design and cinematography.

Film education as a progression route

Learning about film can be enhanced by practical involvement in filmmaking. In addition to the development of critical, creative and cultural skills, gaining filmmaking experience, particularly at an early age, can be a key stepping stone to the development of a career in the film industry.

In 2012, the BFI launched the Film Academy programme – supported now by the Department for Education in England, the National Lottery, Screen Scotland and Northern Ireland Screen – which was designed to help 16-19 year olds develop the necessary skills to enter the film industry. Since its launch, the Academy has enabled talented young people from a range of backgrounds to enjoy out-of-school and residential filmmaking experience, delivered through partner organisations across the nations and regions. Despite the challenges of the COVID-19 pandemic, in 2020/21, the Academy delivered 45 courses through a combination of online and in-venue participation, reaching 855 young people from across the UK (Table 2).

The BFI continued its support of the Film Academy Future Skills trainee programme which aims to provide career opportunities in film to under-represented young people. The 2020/21 scheme was run in partnership with Lucasfilm and enabled 55 young people, the majority of whom were Academy graduates, to work as paid trainees in a variety of craft and technical roles. Trainees were placed across three Lucasfilm productions: the latest Indiana Jones feature film and two high-end TV series, *Willow* and *Andor.*

Across all the Academy courses and programmes in 2020/21, 56% of the participants were female, 22% were from ethnically diverse backgrounds, 17% received free school meals, and 14% were disabled.

Table 2 BFI Film Academy participants, 2016/17-2020/21 (ranked by 2020/21 enrolment)

Nation/region	2016/17	2017/18	2018/19	2019/20	2020/21
England	715	700	694	657	646
London	150	146	162	135	139
South West	110	101	98	98	93
South East	109	81	80	89	83
Yorkshire and The Humber	82	73	75	78	81
East of England	71	83	75	71	73
West Midlands	55	60	60	53	60
North West	54	69	56	56	53
North East	44	46	48	40	39
East Midlands	40	41	40	37	25
Northern Ireland	80	84	82	74	78
Scotland	86	79	60	72	76
Wales	46	30	56	44	55
Total	**927**	**893**	**892**	**847**	**855**

Source BFI

Other film and media education activity

In addition to the activity described above, there are many other organisations involved in the delivery of film education in the UK at both a national and regional level including independent cinemas, regional film archives, training providers and community-based groups. As well as providing courses and learning opportunities for young and adult learners, several organisations provide continuing professional development for teachers and training professionals.

Provision in 2020/21 included: Keep Scotland Beautiful's Youth Climate Film Project, which involved free filmmaking training for youth workers to support young people across Scotland to create short films that explored the climate emergency from their perspective; 73 Degree Films' Future Filmmakers project in Wales, which taught teenage filmmakers (16-19 year olds) from Wrexham how to make films through a series of interactive workshops; Rural Media's Teme Valley Youth Project, which enabled young people from the West Midlands to learn about and make short films; and the Nerve Centre's Digital Film and Media Production scheme, one of a range of free courses for 16+ learners in Northern Ireland that aim to equip students for careers in the creative industries through hands-on training and placements in a variety of production departments.

Due to the coronavirus pandemic, the majority of the BFI's education events in 2020/21 took place online, including those associated with BFI festivals such as Flare and the London Film Festival. As Table 3 shows, physical attendances were severely curtailed during the year. There were 12,600 admissions to education events run by BFI Southbank and BFI festivals, down from 43,000 in 2019/20, while physical visits to the BFI Reuben Library were in the low hundreds. (The library remained accessible throughout the year, however, for virtual research and study.)

Table 3 BFI education attendances, 2010/11-2020/21

	BFI Southbank and festivals education event admissions	BFI Reuben Library visits
2011/12	42,000	11,900
2012/13	43,363	62,000
2013/14	44,641	69,592
2014/15	48,365	72,502
2015/16	46,669	73,146
2016/17	48,108	80,234
2017/18	47,105	77,555
2018/19	46,972	72,516
2019/20	43,373	73,499
2020/21	12,636	324
% change 2019/20-2020/21	-70.9%	-99.6%
% change 2011/12-2020/21	-69.9%	-97.3%

Source: BFI

Employment in the film industry

The film industry employs substantial numbers of highly skilled workers. While employment levels are somewhat volatile, reflecting the variable level of demand for the sector's services, according to the Annual Population Survey (APS) conducted by the Office for National Statistics (ONS), in 2020 around 86,000 people worked in film and video production, film and video distribution and film exhibition (Table 4). The figures include full- and part-time workers.

Table 4 Film industry workforce, 2020

Sector	Number in employment
Film and video production	66,000
Film and video distribution	4,000
Film exhibition	16,000
Total	**86,000**

Source: Office for National Statistics, Annual Population Survey

Notes:

Numbers in employment are taken from the Annual Population Survey for the period January-December 2020.

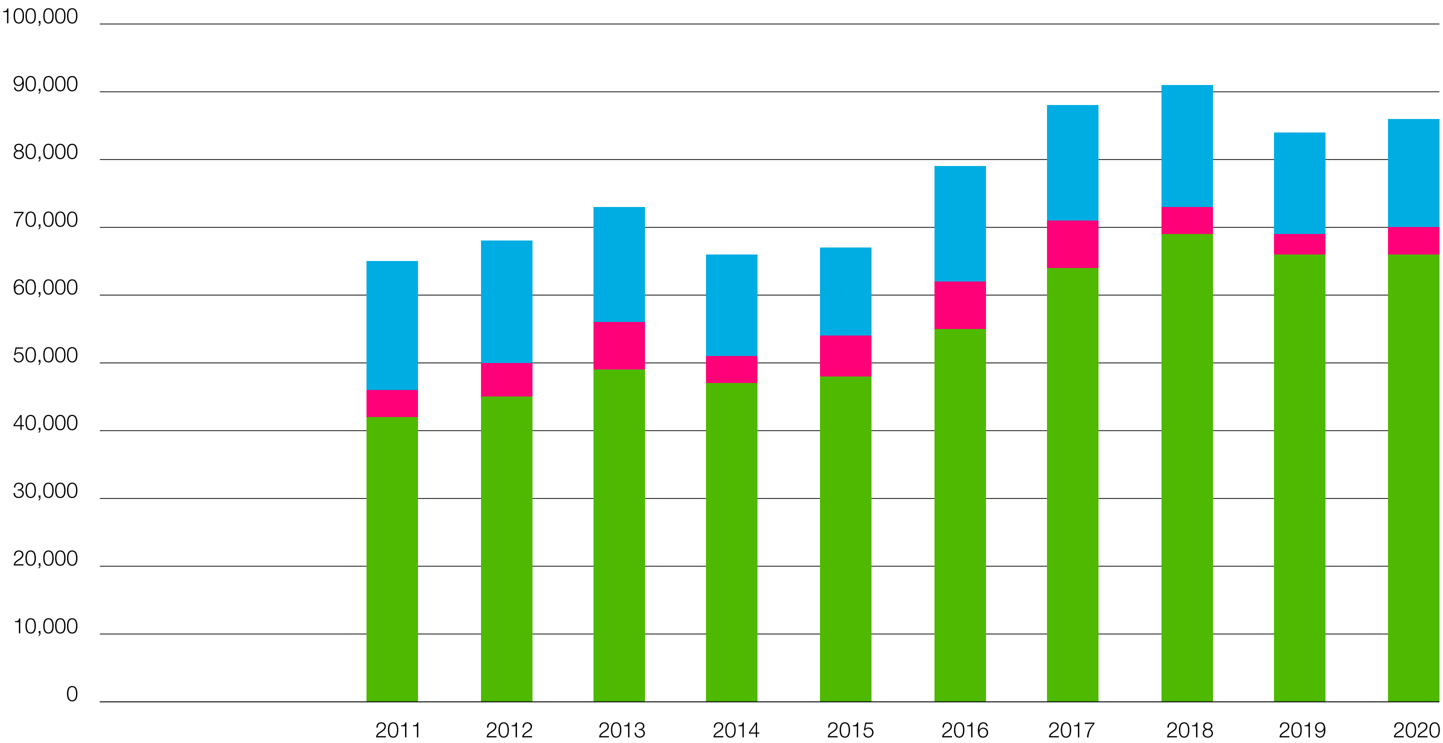
Figures are shown to the nearest 1,000.

People in employment include individuals aged 16 or over who undertook paid work (as an employee or self-employed), those who had a job that they were temporarily away from, those on government-supported training and employment programmes, and those doing unpaid family work.

Figures are based on small sample sizes and are therefore subject to a margin of uncertainty.

As Figure 8 shows, the overall growth in the size of the film workforce between 2011 and 2020 was driven primarily by increases in the number of employees in film and video production. The production workforce grew by 57% over the period, from 42,000 in 2011 to 66,000 in 2020. Employment levels in the industry's other main sectors have been more even: the number of workers in film and video distribution ranged from 3,000-7,000 over the period, while employee numbers in film exhibition ranged from 13,000-19,000. ONS warn that because these are estimates and based on a small sample size they should be treated with caution.

Figure 8 Size of the film workforce, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Film exhibition	42,000	45,000	49,000	47,000	48,000	55,000	64,000	69,000	66,000	66,000
Film and video distribution	4,000	5,000	7,000	4,000	6,000	7,000	7,000	4,000	3,000	4,000
Film and video production	19,000	18,000	17,000	15,000	13,000	17,000	17,000	18,000	15,000	16,000
Total	**65,000**	**68,000**	**73,000**	**66,000**	**67,000**	**79,000**	**88,000**	**91,000**	**84,000**	**86,000**

Source: Office for National Statistics, Annual Population Survey
See notes to Table 4.

The production sector has traditionally employed a high proportion of freelance workers. In 2020, 48% of those engaged in film and video production, a total of more than 32,000 people, were self-employed (Table 5). In comparison, only 14% of the total UK workforce was self-employed in 2020.

Table 5 Film and video production workforce, 2011-2020

Year	Total in employment	Self-employed	Self-employed as % of total
2011	42,000	24,000	57
2012	45,000	22,000	49
2013	49,000	24,000	49
2014	47,000	28,000	61
2015	48,000	24,000	51
2016	55,000	27,000	49
2017	64,000	32,000	50
2018	69,000	31,000	45
2019	66,000	36,000	54
2020	66,000	32,000	48

Source: Office for National Statistics, Annual Population Survey
Notes:
Numbers in employment are shown to the nearest 1,000 but percentages are based on unrounded numbers.
See notes to Table 4.

The gender of writers and directors of UK films

In 2020, of the 137 identified writers of UK films released during the year over a quarter (26%) were women, the highest share of female writers since our records began (Table 6). At 23%, the share of women directors of UK film releases was also a record high (Table 7).

Female writers associated with UK films released in the year include Géraldine Bajard (*Little Joe*), Eleanor Catton (*Emma*), Andrea Chalupa (*Mr. Jones*), Gaby Chiappe and Rebecca Frayn (*Misbehaviour*), Rosanne Flynn and Rachel Tunnard (*Military Wives*) and Theresa Ikoko and Claire Wilson (*Rocks*). Female directors associated with UK films released in the year include Autumn de Wilde (*Emma*), Sarah Gavron (*Rocks*), Agnieszka Holland (*Mr. Jones*), Philippa Lowthorpe (*Misbehaviour*) and Marjane Satrapi (*Radioactive*), while directors who also wrote or co-wrote the scripts for their films include Rose Glass (*Saint Maud*), Jessica Hausner (*Little Joe*), Sally Potter (*The Roads Not Taken*) and Jessica Swale (*Summerland*).

Table 6 Gender of writers of UK films released in the UK, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of UK films released in the UK	127	162	139	154	209	176	159	197	191	96
Number of writers associated with these films	159	187	155	211	285	233	209	276	264	137
Number of male writers	129	162	133	181	244	195	165	211	202	101
Number of female writers	30	25	22	30	41	38	44	65	62	36
% male	81.1	86.6	85.8	85.8	85.6	83.7	78.9	76.4	76.5	73.7
% female	18.9	13.4	14.2	14.2	14.4	16.3	21.1	23.5	23.5	26.3

Source: BFI

Table 7 Gender of directors of UK films released in the UK, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of UK films released in the UK	127	162	139	154	209	176	159	197	191	96
Number of directors associated with these films	140	179	149	165	224	188	178	212	208	104
Number of male directors	119	165	128	148	203	163	150	183	174	80
Number of female directors	21	14	21	17	21	25	28	29	34	24
% male	85.0	92.2	85.9	89.7	90.6	86.7	84.3	86.3	83.7	76.9
% female	15.0	7.8	14.1	10.3	9.4	13.3	15.7	13.6	16.3	23.1

Source: BFI

The workplace location

In 2020, 57% of the UK film and video production workforce was based in London and the South East, compared with 30% of the workforce as a whole (Table 8).

Table 8 London and South East employment as percentage of total, 2020

Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	32,100,000	9,600,000	30.0
Film and video production	66,000	37,300	57.1

Source: Office for National Statistics, Annual Population Survey

Notes:

The South East region wraps around London so includes the major studios to the west of the city.

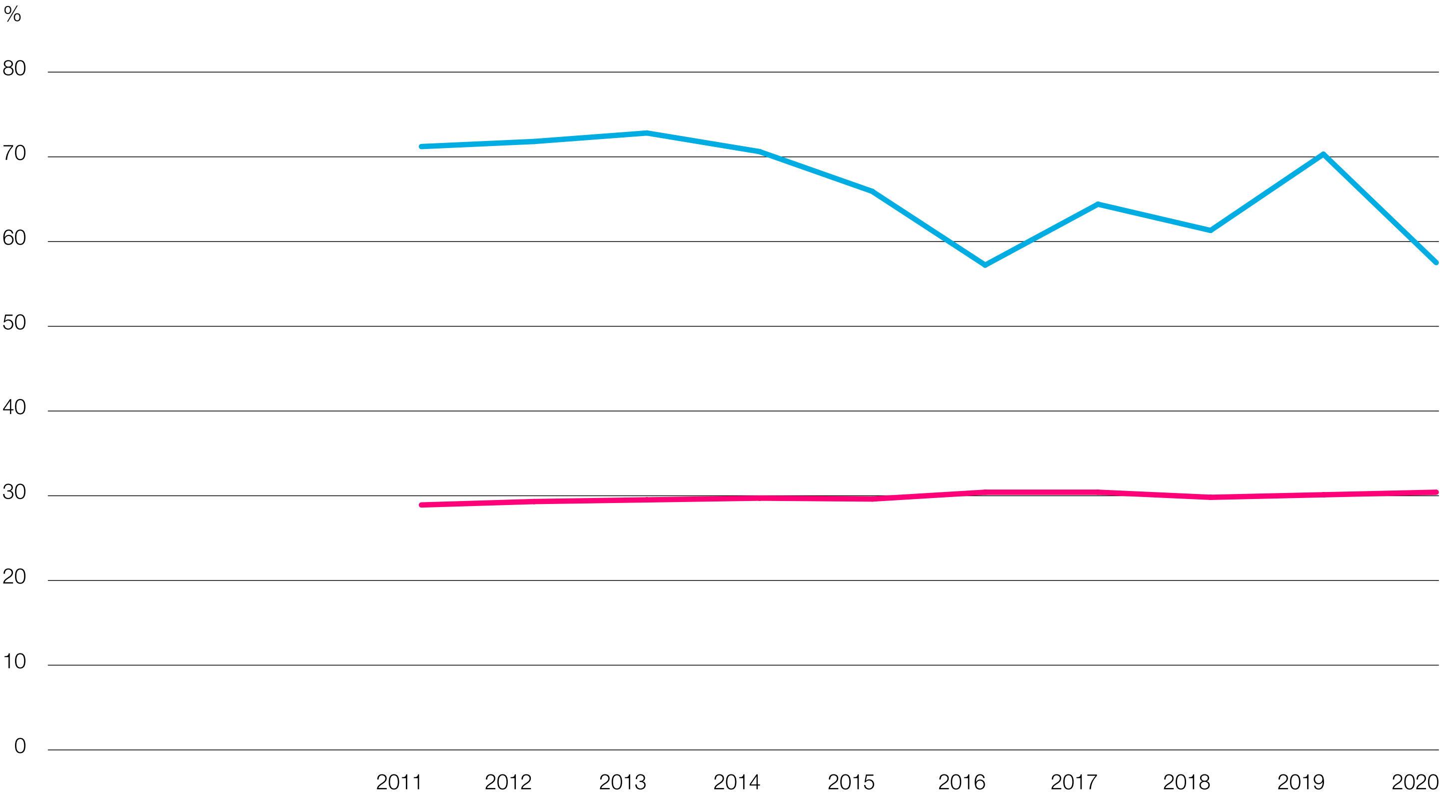
Totals shown in this table are for the calendar year 2020.

Numbers in employment in the film industry are shown to the nearest 1,000 and for all UK industries are shown to the nearest 100,000 but percentages are based on unrounded numbers.

Image: *Radioactive* courtesy of StudioCanal

As Figure 9 shows, the London and South East share of the film and video production workforce is consistently higher than the equivalent share for all UK industries. While the data, which shows a range between 57%-72%, would seem to reflect the differing levels of production activity based in the capital and the surrounding major studios, in part the variation arises from the small sample size of the survey at industry sub-sector level. The percentage of the overall UK workforce based in London and the South East has remained fairly stable at around 29%-30%.

Figure 9 London and South East percentage share of the film and video production and total workforce, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Film and video production	70.8	71.4	72.4	70.2	65.5	56.8	64.0	60.9	69.9	57.1
UK all industries	28.5	28.9	29.1	29.3	29.2	30.0	30.0	29.4	29.7	30.0

Source: Office for National Statistics, Annual Population Survey
See notes to Table 8.

The scale of the workplace

Tables 9 to 11 show the numbers of employees, by size of workplace, for film and video production, film and video distribution, and film exhibition.

Employment data

The data in tables 9 to 11 are from the Inter-Departmental Business Register (IDBR), which is maintained by the Office for National Statistics (ONS). These data differ from the estimates shown in the previous sections, which are based on the Annual Population Survey (APS). The APS counts the number of people employed whereas the IDBR, which is updated from administrative sources and from surveys of employers, includes numbers of jobs. The numbers of jobs and the numbers of people employed are not the same thing, and the data come from different sources, but the estimates arising from them should be similar. However, as the figures for 2020 show, this is not always the case. The ONS has identified a number of reasons for differences between the estimates, but the two most important ones when looking at particular industry sub-sectors are likely to be sampling error arising from the small APS sample size at industry sub-sector level and the fact that there are two classification processes involved. In the APS, individuals are classified by industry depending on the industrial information they give, whereas in the IDBR the classification is based on companies' activities. As people and companies often work across more than one industry (television and film, for example) this gives rise to unpredictable variations between the APS and the IDBR measures.

In 2020, the film and video production sector had a very large number of workplaces with low numbers of employees (Table 9). Workplaces with 10 employees or fewer accounted for 97% of all workplaces in the sector and over half of its total workforce (56%). At the other end of the scale, there were a small number of workplaces with high numbers of employees. The 60 workplaces with 50 or more workers accounted for just under 9,800 employees, an average of 163 each.

Table 9 Numbers of employees in film and video production by size of workplace for the UK, 2020

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	60	0.5	9,790	28.6
11-49	285	2.3	5,252	15.3
1-10	11,880	97.2	19,230	56.1
Total	**12,225**	**100.0**	**34,272**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

As Table 10 shows, employment in the film and video distribution sector was less concentrated in small workplaces than the production sector, with 81% of workers based in workplaces with 11 or more employees, and 66% of workers based in workplaces with 50 or more employees.

Table 10 Numbers of employees in film and video distribution by size of workplace for the UK, 2020

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	15	2.9	3,755	66.3
11-49	40	7.8	821	14.5
1-10	455	89.2	1,086	19.2
Total	**510**	**100.0**	**5,662**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register
Note: Percentages may not sum to 100 due to rounding.

The film exhibition sector had the smallest concentration of workers in the 1-10 employee band, with 96% of workers based in workplaces with 11 or more employees (Table 11). Unlike the film and video distribution sector, however, the majority (56%) of workers were based in workplaces with 11-49 employees.

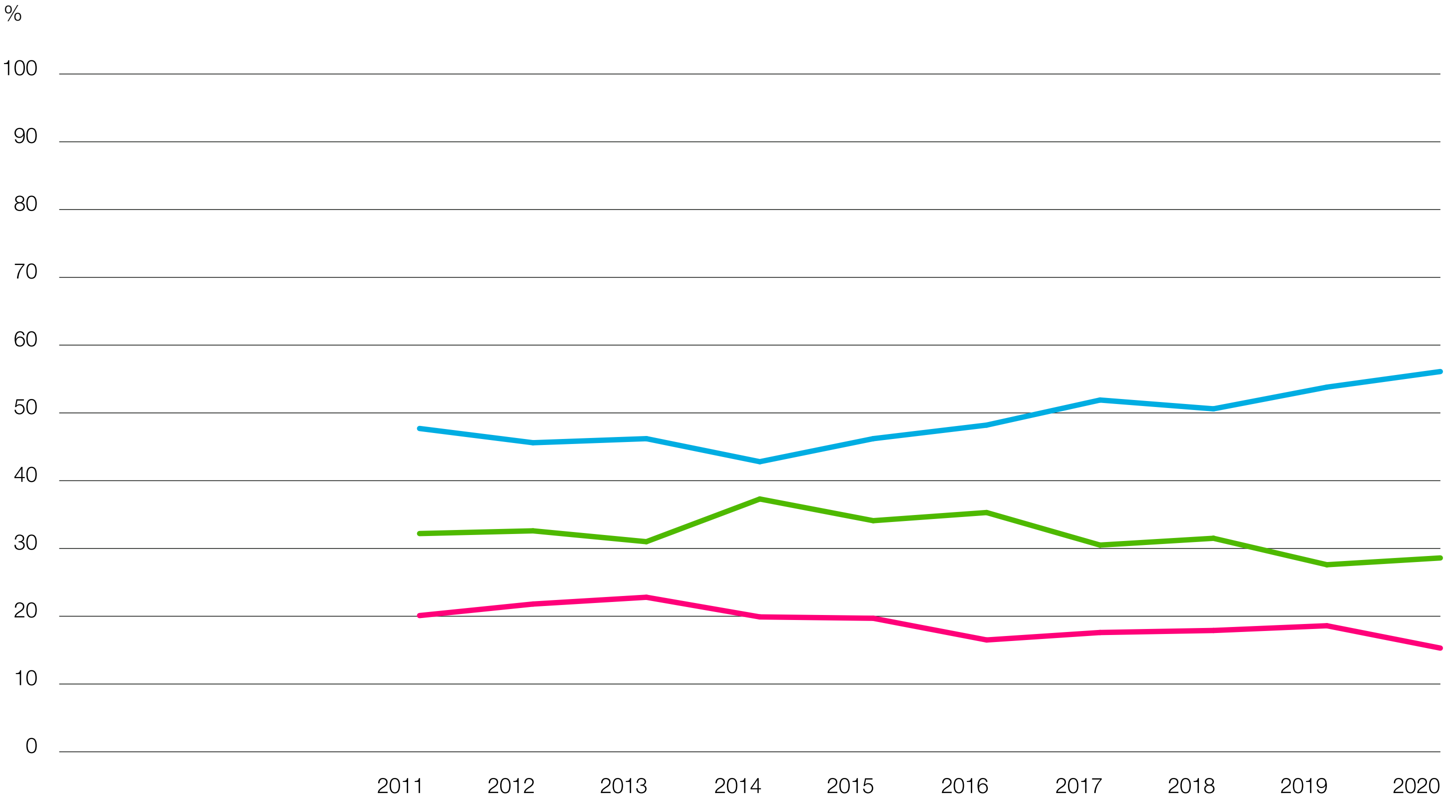
Table 11 Numbers of employees in film exhibition by size of workplace for the UK, 2020

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	125	16.9	8,501	40.2
11-49	415	56.1	11,907	56.2
1-10	200	27.0	762	3.6
Total	**740**	**100.0**	**21,170**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

Figure 10 shows the percentage of film and video production sector employees in workplaces with 1-10, 11-49, and 50 or more employees from 2011 to 2020. The share of the workforce in workplaces with 1-10 employees fell from 48% in 2011 to a low of 43% in 2014 and since then has grown to 56%, while the share of employees in larger workplaces (50+ employees) fell from 32% in 2011 to 29% in 2020, although this is up from a period low of 28% in 2019. The data also shows a downward trend for the share of film and video production sector employees in workplaces with 11-49 employees, which decreased from 20% in 2011 to 15% in 2020.

Figure 10 Film and video production employees by workplace size band, percentage of total, 2011-2020

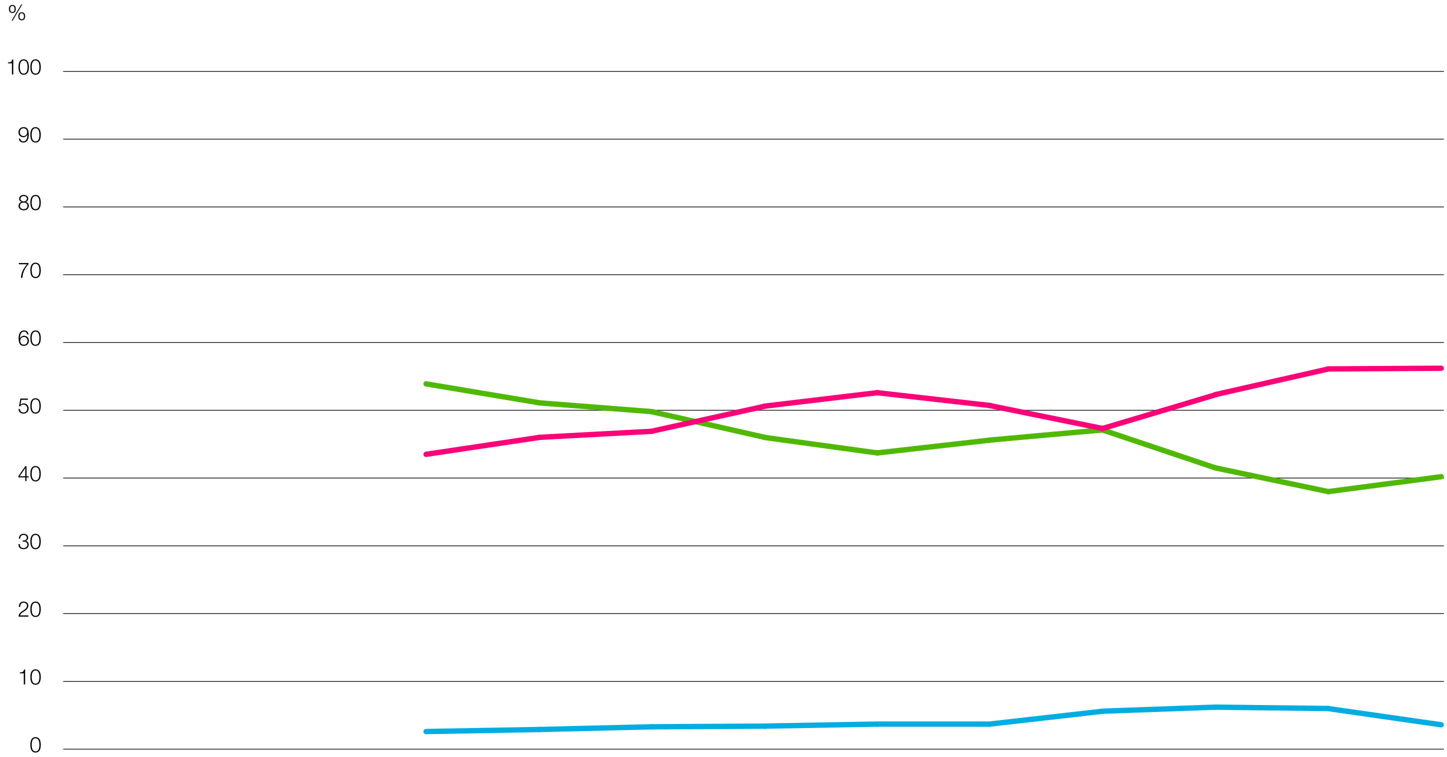


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
1-10 employees	47.7	45.6	46.2	42.8	46.2	48.2	51.9	50.6	53.8	56.1
11-49 employees	20.1	21.8	22.8	19.9	19.7	16.5	17.6	17.9	18.6	15.3
50+ employees	32.2	32.6	31.0	37.3	34.1	35.3	30.5	31.5	27.6	28.6

Source: Office for National Statistics, Inter-Departmental Business Register

As Figure 11 shows, between 2011 and 2020, the share of film exhibition sector employees in workplaces with 50 or more workers has increased or declined in almost direct proportion to the opposite movement in the share of employees in workplaces with 11-49 workers. The percentage of employees in the smallest workplace band has shown a slight overall upward trend over the period, rising from 2.6% in 2011 to 3.6% in 2020 but was particularly high between 2017 and 2019 where the share ranged between 5.6%-6.2%.

Figure 11 Film exhibition employees by workplace size band, percentage of total, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
1-10 employees	2.6	2.9	3.3	3.4	3.7	3.7	5.6	6.2	6.0	3.6
11-49 employees	43.5	46.0	46.9	50.6	52.6	50.7	47.3	52.3	56.1	56.2
50+ employees	53.9	51.1	49.8	46.0	43.7	45.6	47.1	41.5	38.0	40.2

Source: Office for National Statistics, Inter-Departmental Business Register

THE UK FILM ECONOMY

FACTS IN FOCUS

The UK film industry is a valuable sector of the British economy. In 2019 (the last year for which data are available), its direct contribution to Gross Domestic Product was £8 billion. Between 2016 and 2020, the number of companies involved in the industry increased by 22%. In 2020, film production companies represented 51% of companies and 29% of turnover.

- In 2019, the UK film industry had a turnover of £18.8 billion.
- The UK film industry's direct contribution to Gross Domestic Product (GDP) represented 7% of the GDP of all the creative industries.
- The industry exported £2.3 billion worth of services in 2019, made up of £1.7 billion in royalties and £600 million in audiovisual and related services.
- The value of exports in 2019 was the second highest of the period 2010-2019.
- The UK film trade surplus in 2019 was £1.28 billion.
- In 2020, there were over 8,600 film production companies and over 3,000 post-production companies in the UK.
- There were 405 film distributors and 270 film exhibitors.
- The majority of companies were small (turnover under £250,000).
- The production, post-production and distribution sectors were concentrated in London and the South East, while the exhibition sector was more dispersed.

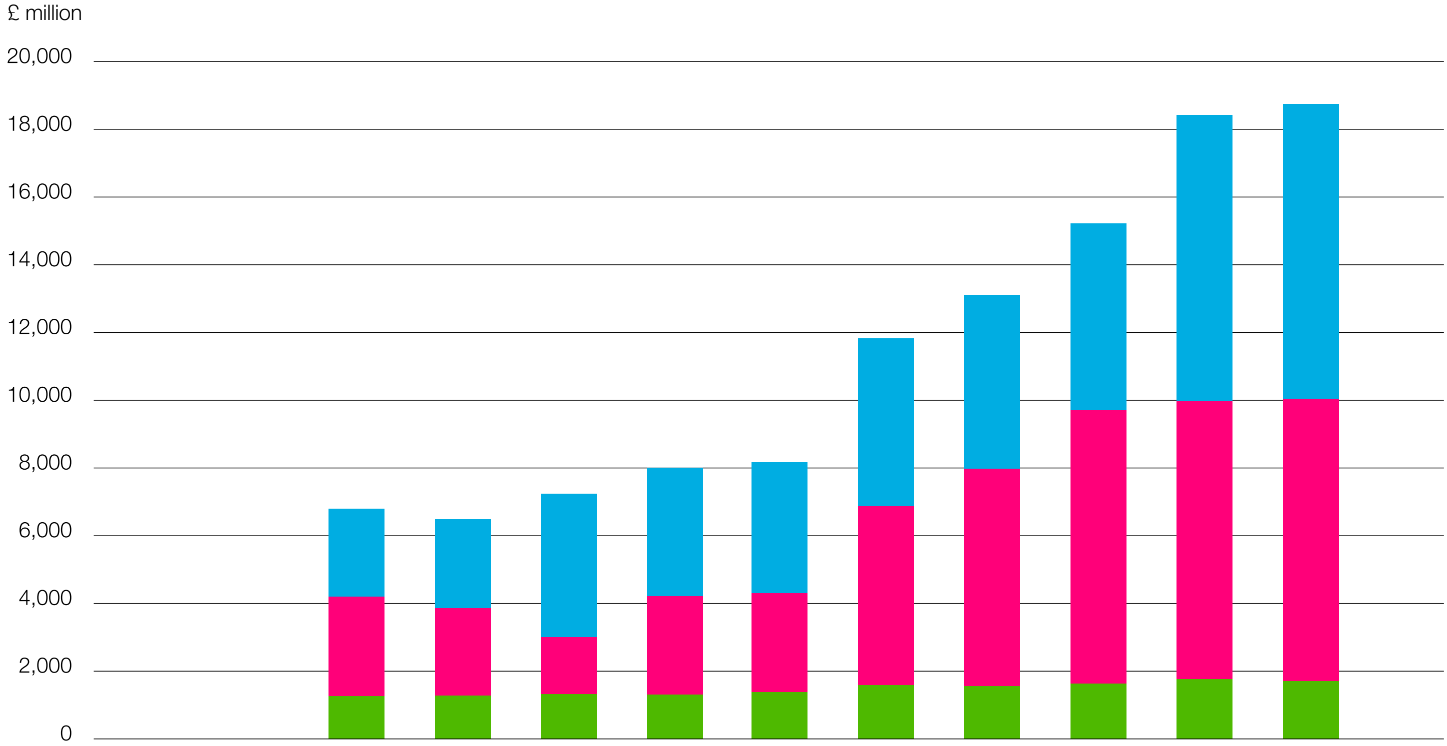
The UK film economy

Film industry turnover, 2010-2019

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 2010-2019. Each of the three sectors has shown growth over the decade, with total industry turnover increasing by 176% from £6.8 billion in 2010 to £18.8 billion in 2019, largely due to an increase in production and distribution turnover. (Current data show total industry turnover increased by 1.8% between 2018 and 2019. However, this is likely to be amended upwards: the previously published figure for 2018 – £16.7 billion – has been revised to £18.4 billion.)

Image: *The Personal History of David Copperfield* courtesy of Lionsgate Films

Figure 1 Total turnover of UK film industry by sector, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2010-2019
Film and video production (including post-production)	2,596	2,619	4,238	3,793	3,852	4,969	5,124	5,523	8,448	8,715	235.7
Film and video distribution	2,950	2,592	1,680	2,912	2,926	5,270	6,427	8,074	8,217	8,330	182.4
Film exhibition	1,257	1,270	1,325	1,299	1,379	1,593	1,551	1,623	1,756	1,708	35.9
Total	**6,803**	**6,481**	**7,243**	**8,004**	**8,157**	**11,832**	**13,102**	**15,220**	**18,421**	**18,753**	**175.7**

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 2007. The SIC codes can be found at https://www.gov.uk/government/publications/standard-industrial-classification-of-economic-activities-sic.

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

Data for 2017 and 2018 have been revised since publication of the 2020 Statistical Yearbook.

Table 1 provides a more detailed breakdown of industry turnover by sub-sector, showing data for film production and distribution separately from video production and distribution. The figures underscore the high sunk costs associated with the production and marketing of feature films.

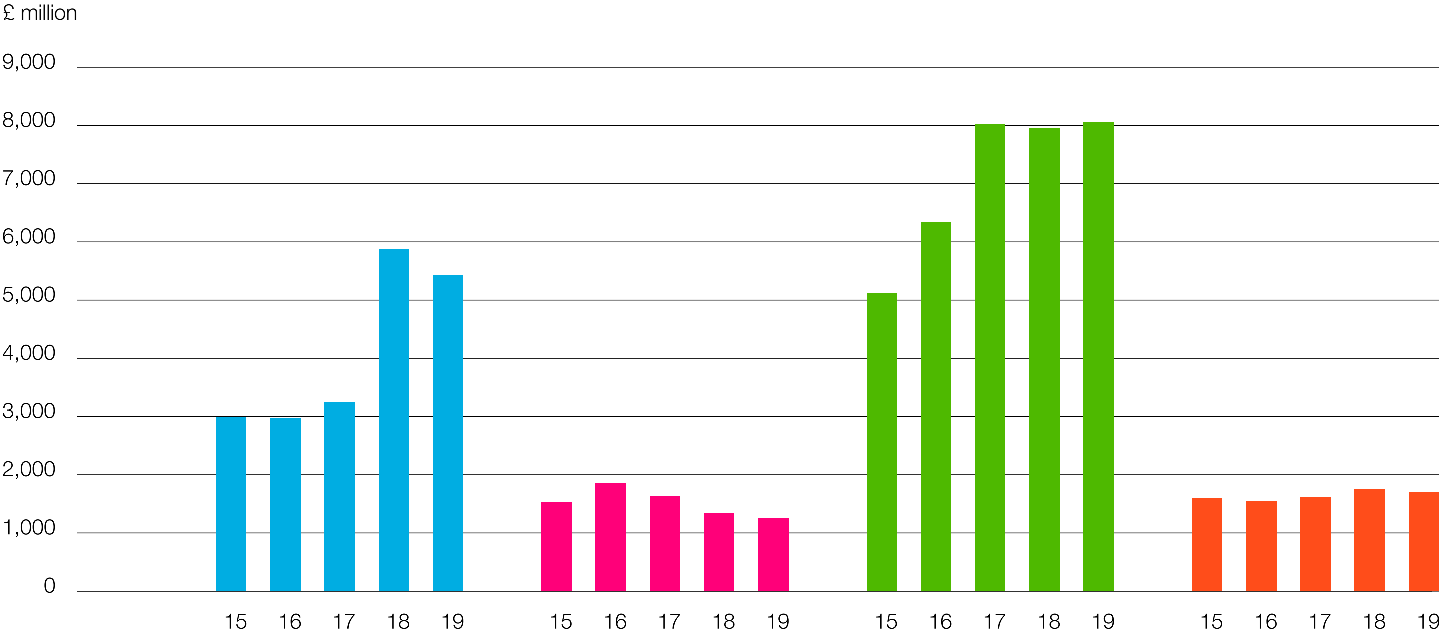
Table 1 Total turnover of UK film industry by sub-sector, 2019

Sub-sector	Turnover (£ million)	% of total
Film production	5,436	29.0
Video production	2,021	10.8
Film, video and TV post-production	1,258	6.7
Film distribution	8,064	43.0
Video distribution	266	1.4
Film exhibition	1,708	9.1
Total	**18,753**	**100.0**

Source: Office for National Statistics Annual Business Survey
Notes:
Data based on 2007 SIC codes; see notes to Figure 1.
Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Figure 2 shows the annual turnover of film production, film, video and TV post-production, film distribution, and film exhibition from 2015 to 2019. Film distribution had the highest annual turnover of all film industry sub-sectors throughout the period and was the only sub-sector to see an increase in turnover (1%) between 2018 and 2019.

Figure 2 Total turnover of film sub-sectors, 2015-2019

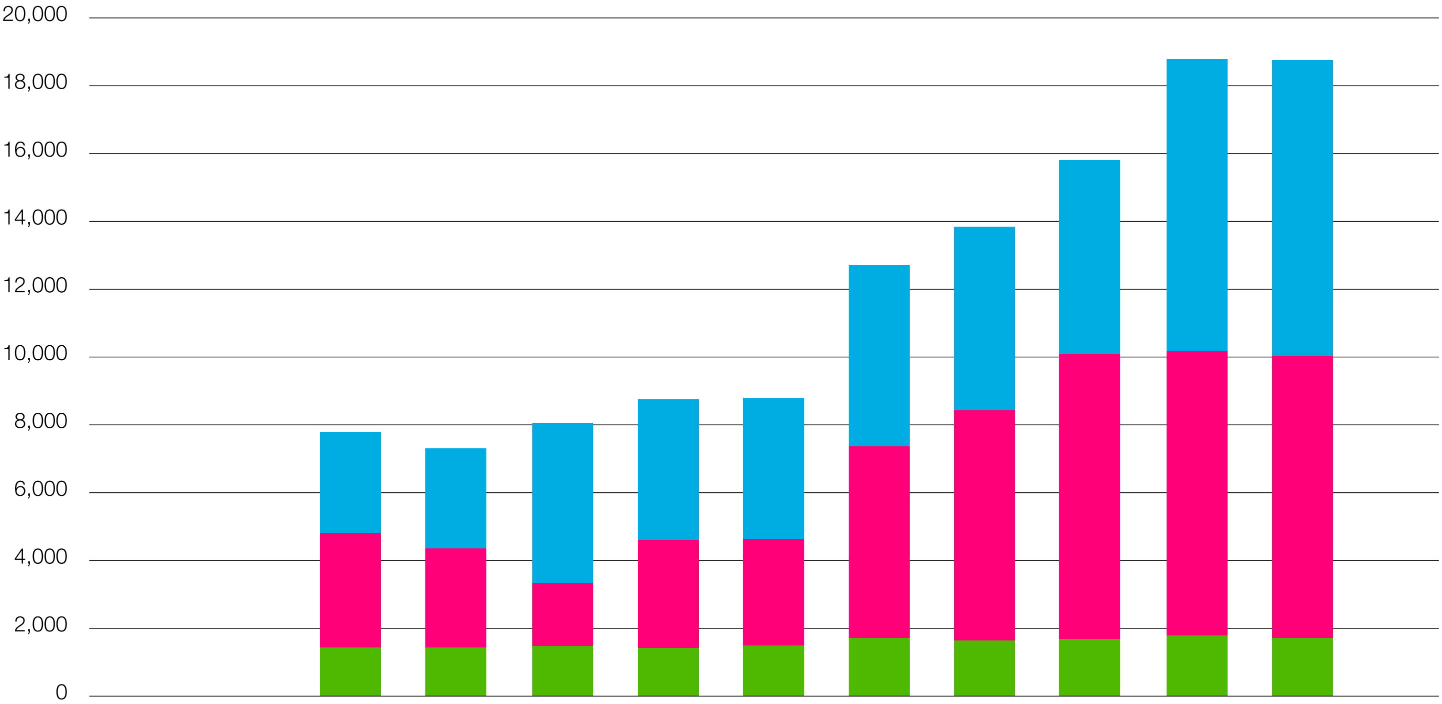


	Film production	Post-production	Film distribution	Film exhibition
2015	2,989	1,525	5,126	1,593
2016	2,968	1,859	6,340	1,551
2017	3,245	1,625	8,025	1,623
2018	5,873	1,338	7,952	1,756
2019	5,436	1,258	8,064	1,708

Source: Office for National Statistics Annual Business Survey
Notes:
See notes to Table 1.
Data for 2017 and 2018 have been revised since publication of the 2020 Statistical Yearbook.

Total industry turnover between 2010 and 2019 expressed in real terms, i.e. with the effects of inflation removed, is shown in Figure 3. The real increase since 2010 was 193% for film and video distribution, 147% for film and video production (including post-production) and 19% for film exhibition. Overall, in real terms, turnover in 2019 was 141% higher than in 2010.

Figure 3 Inflation-adjusted turnover of UK film industry by sector, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2010-2019
Film and video production (including post-production)	2,971	2,951	4,716	4,145	4,154	5,335	5,412	5,738	8,615	8,715	193.3
Film and video distribution	3,376	2,921	1,869	3,183	3,156	5,659	6,788	8,389	8,379	8,330	146.7
Film exhibition	1,439	1,431	1,474	1,420	1,487	1,710	1,638	1,686	1,791	1,708	18.7
Total	**7,786**	**7,303**	**8,060**	**8,748**	**8,797**	**12,704**	**13,838**	**15,813**	**18,785**	**18,753**	**140.9**

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-september-2021-quarterly-national-accounts.

Values expressed in constant 2019 pounds.

For sector classifications, see notes to Figure 1.

For 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.

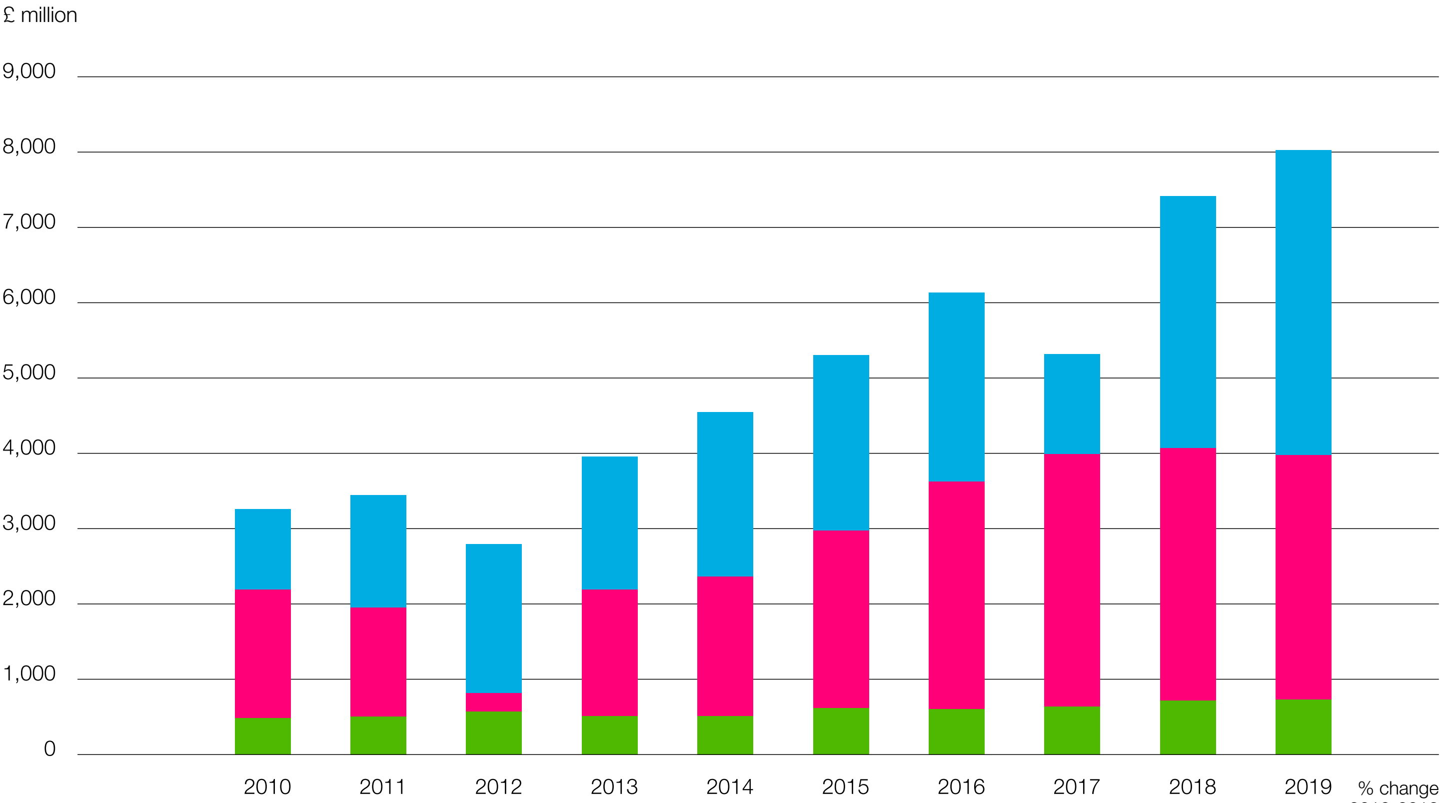
Film industry contribution to GDP, 2010-2019

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 2019 was £8 billion (Figure 4). According to the Department for Digital, Culture, Media & Sport's Economic Estimates 2019 report, the GVA for all UK creative industries in 2019 was £115.9 billion, so film accounted for 7% of all creative industries' value added.

In 2019, distribution accounted for 50% of total film industry GVA, production (including post-production) accounted for 41% and exhibition for 9%. Between 2010 and 2019, total GVA for the film industry increased by 146%.

Figure 4 UK film industry gross value added, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2010-2019
Film and video production (including post-production)	1,071	1,495	1,976	1,766	2,187	2,325	2,513	1,330	3,347	4,044	277.6
Film and video distribution	1,706	1,442	249	1,680	1,848	2,360	3,023	3,352	3,348	3,251	90.6
Film exhibition	483	505	567	511	513	616	601	636	718	728	50.7
Total	**3,260**	**3,442**	**2,792**	**3,957**	**4,548**	**5,301**	**6,137**	**5,318**	**7,413**	**8,023**	**146.1**

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

Table 2 shows the GVA breakdown in 2019 by film industry sub-sector. Film distribution was the highest single contributor, with a GVA of £3.2 billion (40% of the total), followed by film production with a GVA of £2.4 billion (30% of the total). These figures differ from those in Figure 4 as they show film distribution separately to video distribution and film production separately to video production and film, video and TV post-production.

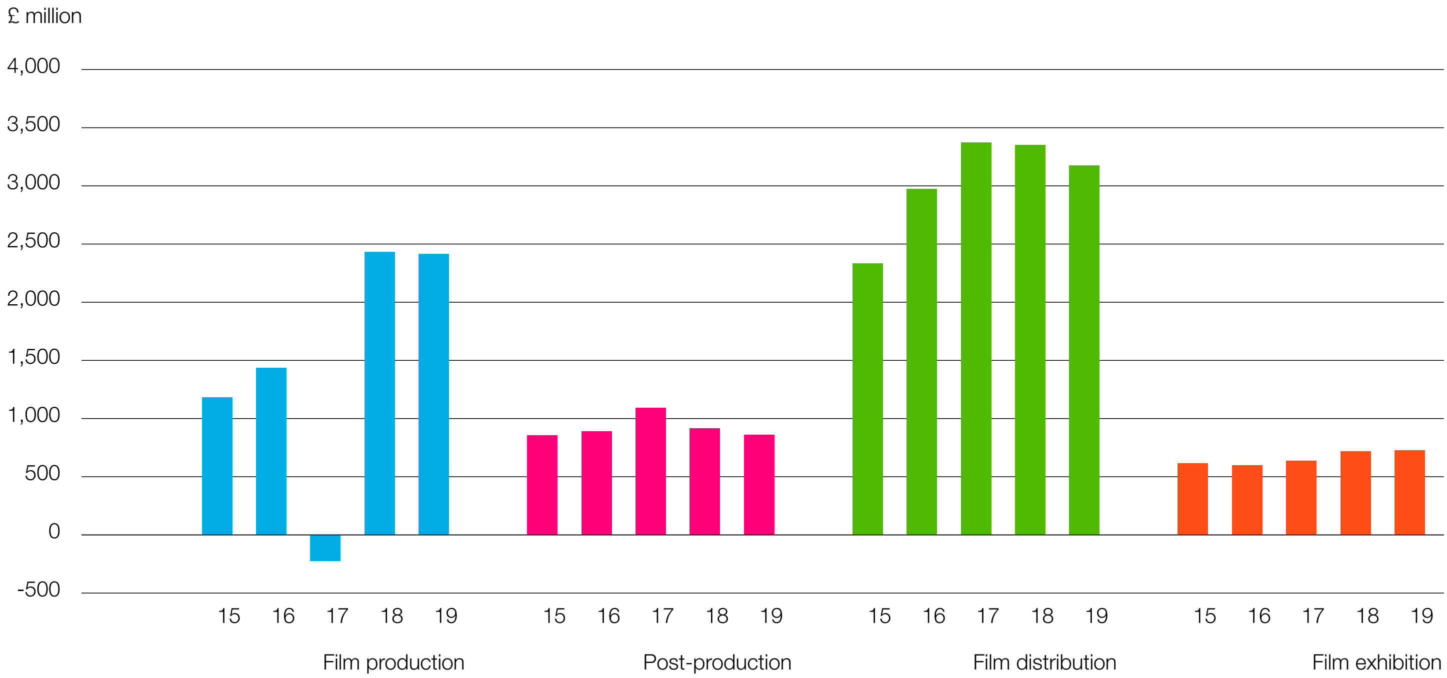
Table 2 UK film industry gross value added by sub-sector, 2019

Sub-sector	GVA (£ million)	% of total
Film production	2,416	30.1
Video production	768	9.6
Film, video and TV post-production	860	10.7
Film distribution	3,175	39.6
Video distribution	76	0.9
Film exhibition	728	9.1
Sector total	**8,023**	**100.0**

Source: Office for National Statistics Annual Business Survey
Notes:
Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Figure 5 shows the breakdown of GVA by sub-sector from 2015 to 2019. As with turnover, film distribution consistently had the highest value added over the period. Film production saw the greatest increase in GVA from 2015 to 2019, rising from £1.2 billion to £2.4 billion, while film distribution also saw a significant increase, rising from £2.3 billion to £3.2 billion. GVA for film, video and TV post-production and film exhibition was broadly constant over the period.

Figure 5 Gross value added of film sub-sectors, 2015-2019

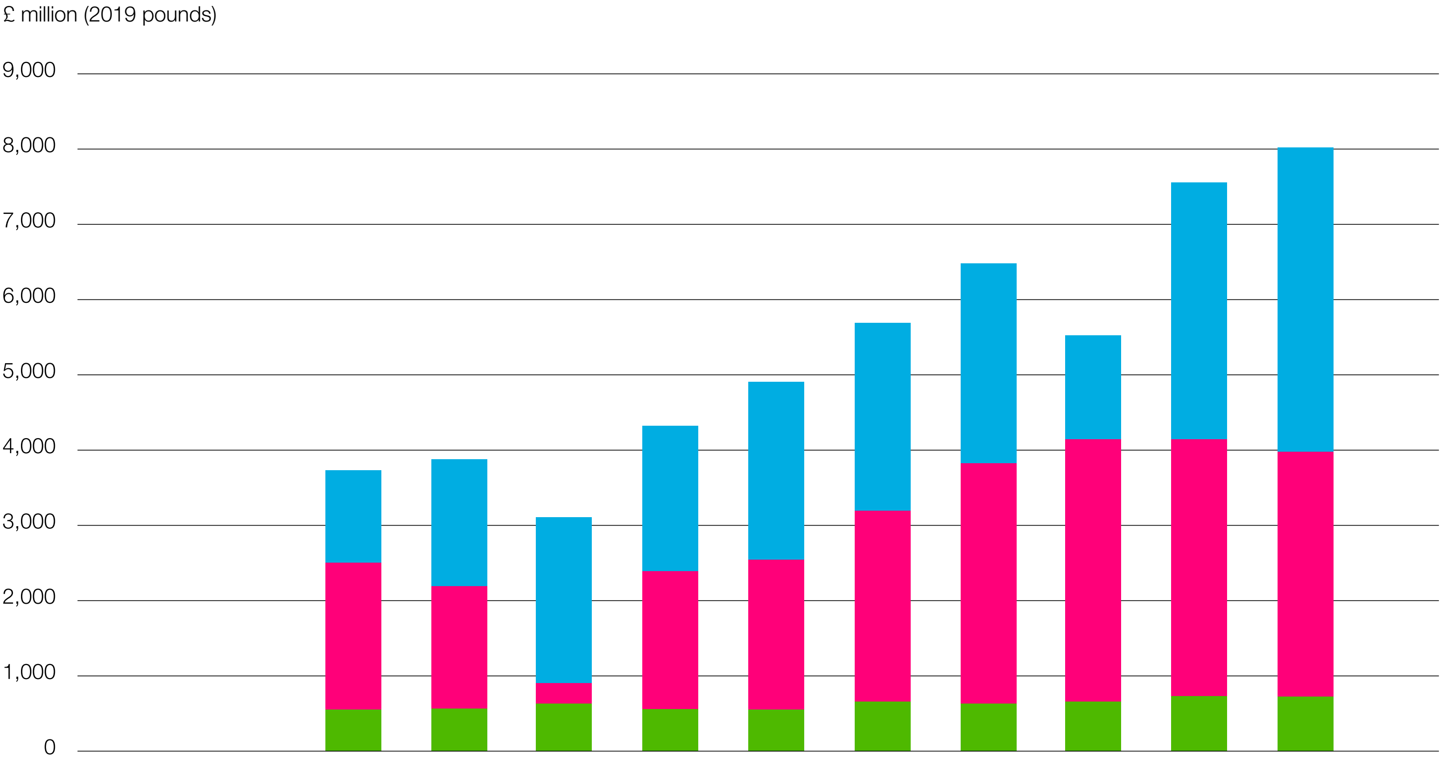


	Film production	Post-production	Film distribution	Film exhibition
2015	1,183	857	2,334	616
2016	1,435	893	2,975	601
2017	-226	1,092	3,374	636
2018	2,432	915	3,352	718
2019	2,416	860	3,175	728

Source: Office for National Statistics Annual Business Survey
Notes:
See notes to Table 2.
The Office for National Statistics reports a negative GVA for film production in 2017 (-£226 million) which was primarily due to investments in projects that would show returns in later years.
Data for previous years have been revised since publication of the 2020 Statistical Yearbook.

Figure 6 shows the industry's value added expressed in real terms, i.e. with the effects of inflation removed. In real terms, GVA for the film industry as a whole in 2019 was 115% higher than its value in 2010.

Figure 6 UK film industry real gross value added, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2010-2019
Film and video production (including post-production)	1,226	1,685	2,199	1,930	2,359	2,496	2,654	1,382	3,413	4,044	229.9
Film and video distribution	1,953	1,625	277	1,836	1,993	2,534	3,193	3,483	3,414	3,251	66.5
Film exhibition	553	569	631	558	553	661	635	661	732	728	31.7
Total	**3,731**	**3,878**	**3,107**	**4,325**	**4,905**	**5,692**	**6,482**	**5,525**	**7,560**	**8,023**	**115.0**

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-september-2021-quarterly-national-accounts.

Values expressed in constant 2019 pounds.

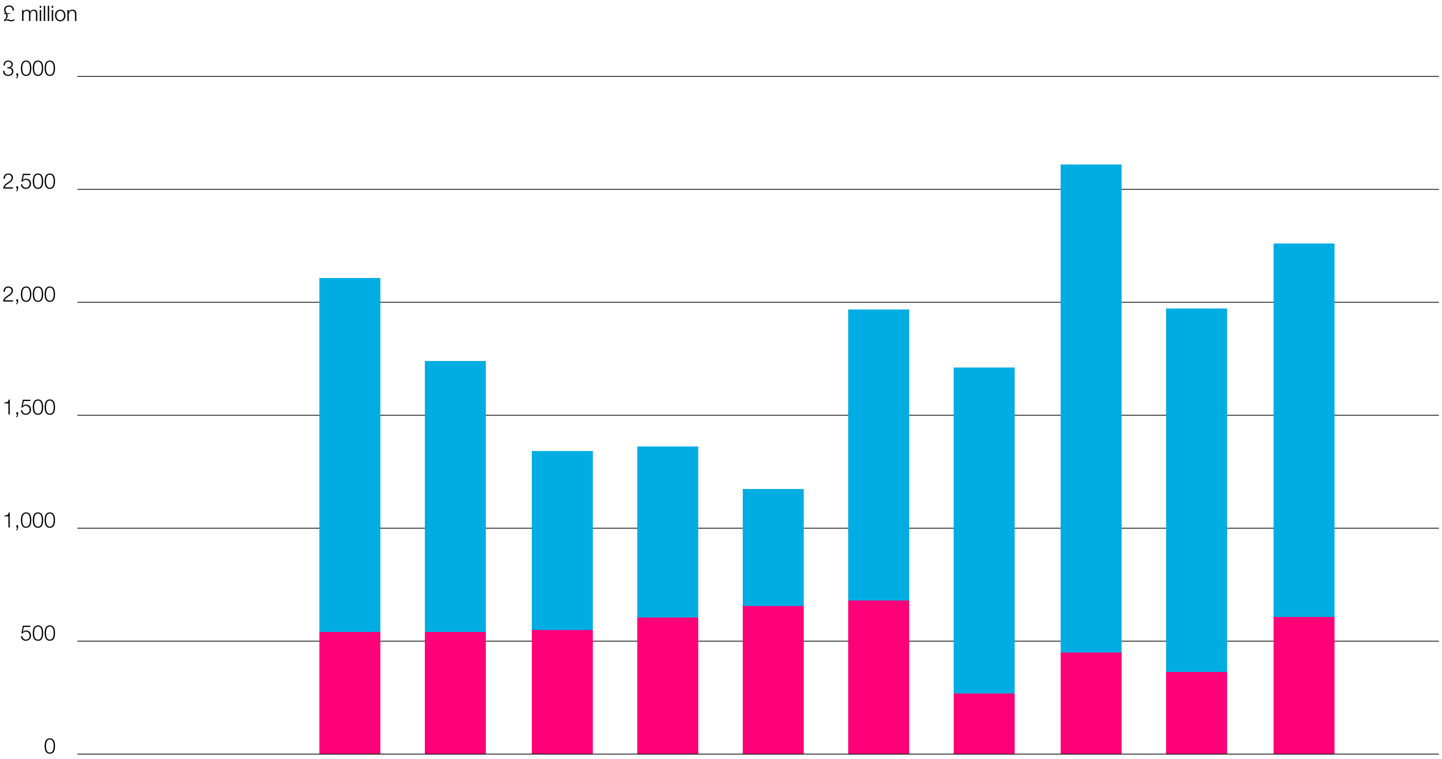
For 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

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

Film exports, 2010-2019

The UK film industry exported £2.3 billion worth of services in 2019 (the latest year for which data are available), of which £1.7 billion (73%) comprised royalties earned overseas from the exploitation of UK intellectual property and £0.6 billion (27%) comprised the sale of UK-based audiovisual and related services to foreign investors. As Figure 7 shows, the value of exports in 2019 was the second highest of the 10-year period 2010-2019.

Figure 7 UK film industry exports, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2010-2019
Intellectual property	1,566	1,199	792	756	519	1,289	1,441	2,158	1,608	1,653	5.6
Audiovisual and related services	541	540	550	605	655	679	269	450	364	606	12.0
Total	**2,107**	**1,739**	**1,342**	**1,361**	**1,174**	**1,968**	**1,710**	**2,608**	**1,972**	**2,260**	**7.3**

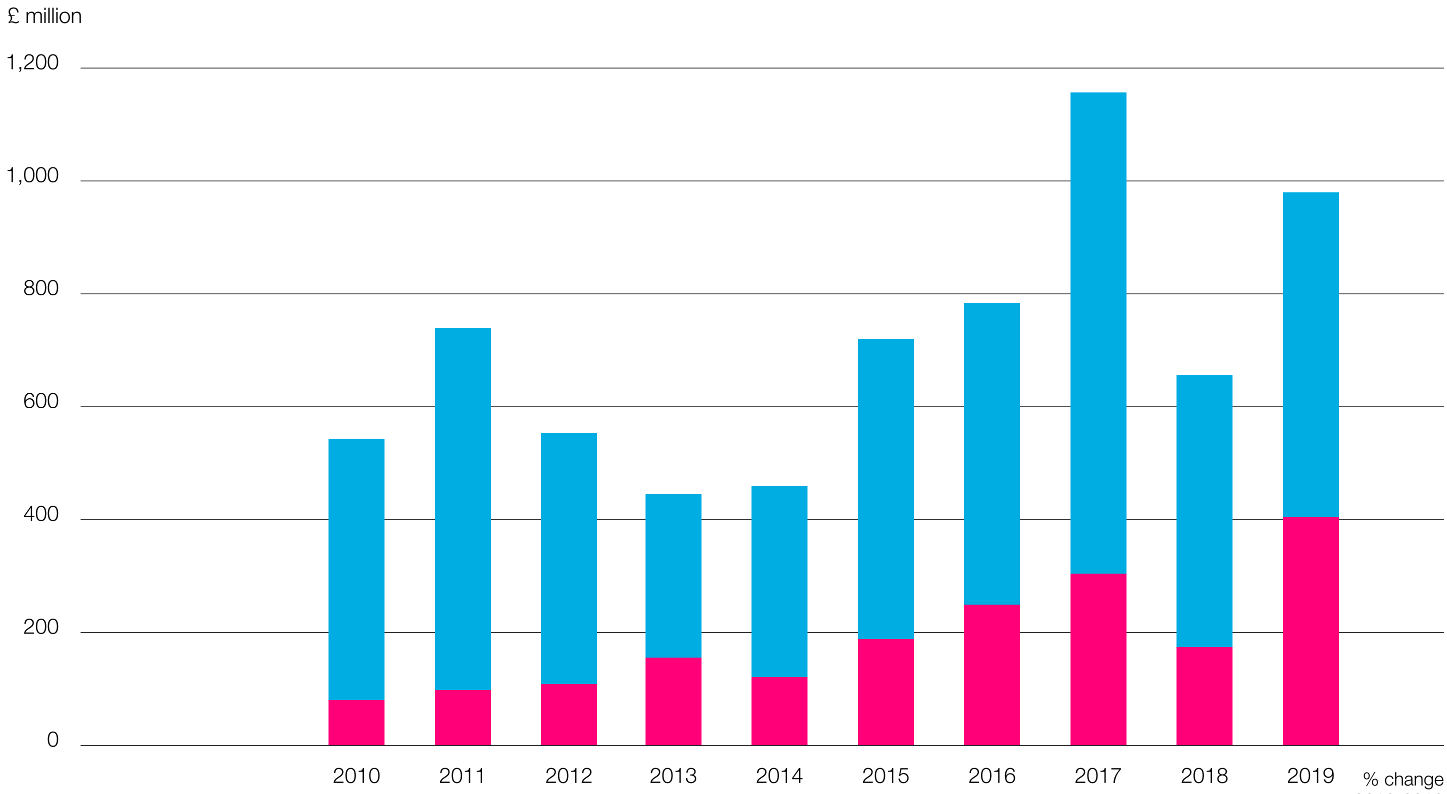
Source: Office for National Statistics Annual Survey of International Trade in Services
Note: This chart shows the results for film companies only.

Film imports, 2010-2019

The UK film industry imported £980 million worth of services in 2019, of which £576 million (59%) comprised intellectual property and £404 million (41%) comprised audiovisual and related services (Figure 8). As with the value of exports, total imports in 2019 were the second highest of the period.

While royalties from intellectual property made up the majority of imports between 2010 and 2019, the share of imports associated with audiovisual and related services saw an increase in the most recent years. The reasons for this 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, 2010-2019



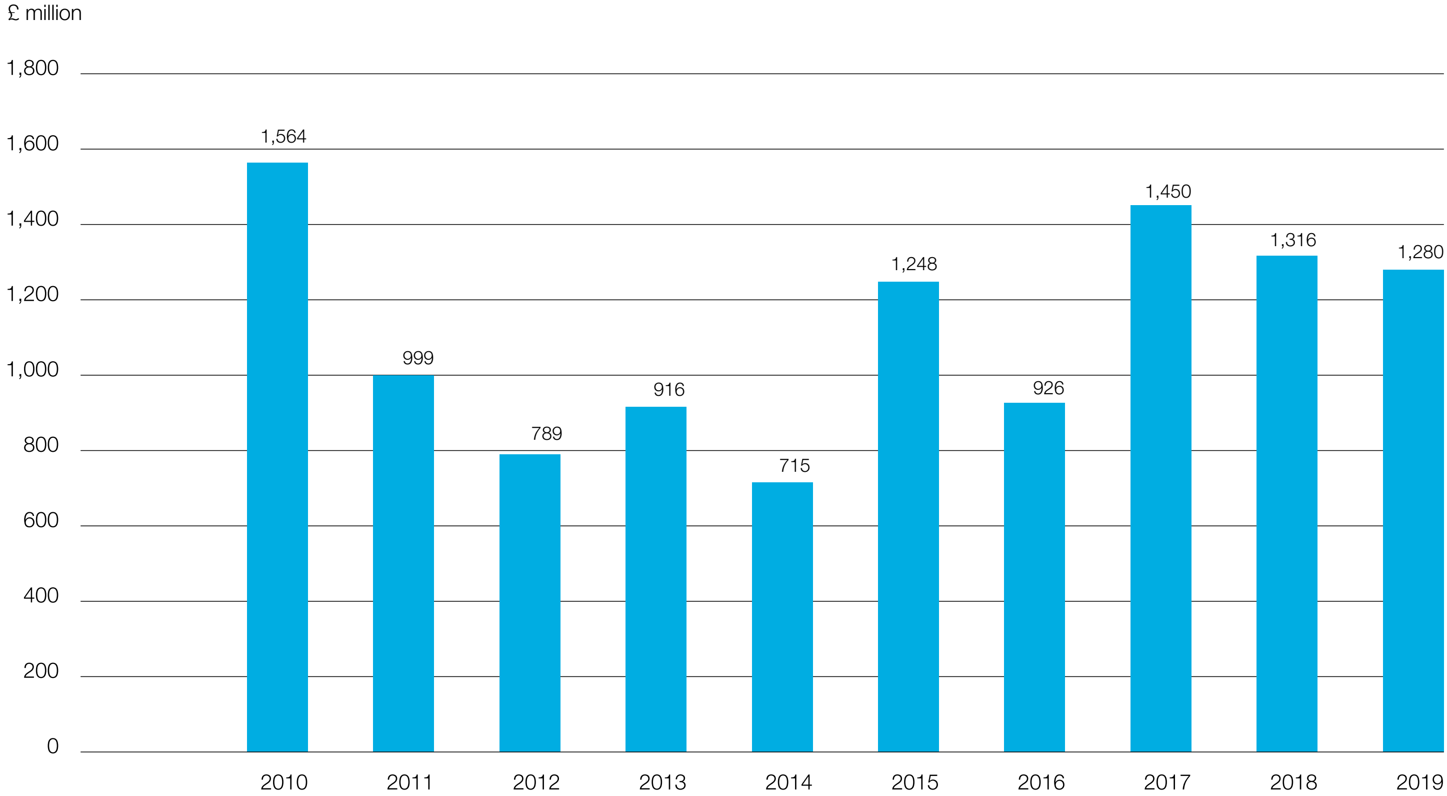
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2010-2019
Intellectual property	463	642	445	290	338	532	535	853	482	576	24.4
Audiovisual and related services	80	98	108	155	121	188	249	304	174	404	405.0
Total	**543**	**740**	**553**	**445**	**459**	**720**	**784**	**1,157**	**656**	**980**	**80.5**

Source: Office for National Statistics Annual Survey of International Trade in Services
See notes to Figure 7.

The film trade balance, 2010-2019

The film industry made a continuous positive contribution to the UK balance of payments between 2010 and 2019 (Figure 9). The trade surplus (positive balance of exports over imports) in 2019 was £1.28 billion, the fourth highest recorded surplus of the period.

Figure 9 Trade surplus of UK film industry, 2010-2019



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 2015-2019. The leading export destination for the period was the European Union (EU) with a 43% share of exports, followed by the USA (24%). This is the third consecutive five-year period to see the EU surpass the USA as the primary export destination for UK film, and the fourth since our records began.

Figure 10 Destination of UK film exports as percentage of the total, 2015-2019

	%
EU	43.3
Other Europe	5.5
USA	24.2
Asia	17.5
Rest of the world	9.5
Total	**100.0**

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

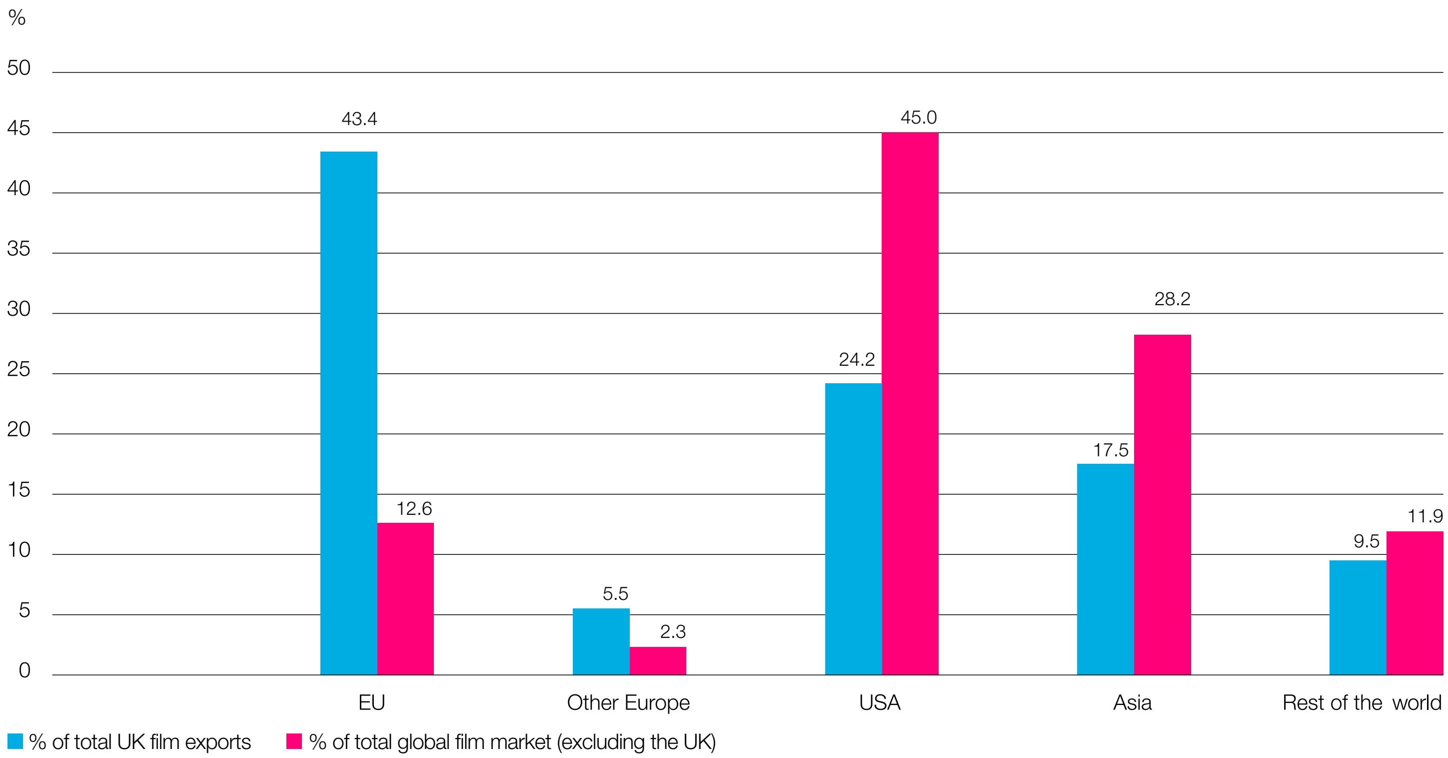
UK film exports compared with the global market for filmed entertainment

A useful comparison can be made between UK film export shares and the geographical distribution of the global market for film (Figure 11). For the EU, 'other Europe' and 'rest of the world' the shares of UK exports were higher than the shares of the ex-UK global filmed entertainment market in those regions, whereas the reverse was true for the USA and Asia. The differences that stand out are:

- The higher proportion of UK exports to Europe (43% of the UK's film exports were to the EU compared with the EU's 13% share of the ex-UK global filmed entertainment market, and 5.5% of film exports were to 'other Europe' compared with a 2.3% ex-UK global market share);
- The lower proportion of UK exports to the USA (24%) compared with the USA's share of the ex-UK global market (45%); and
- The lower proportion of UK exports to Asia (17.5%) compared with the Asian countries' share of the ex-UK global market (28%).

The latter two cases reflect the strength of the USA and main Asian countries (China, India, Japan and South Korea) in their own markets and the consequent lower market shares for UK films.

Figure 11 UK export shares (2015-2019) compared with the global market for filmed entertainment, 2019



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

The geographical distribution of the UK's film trade surplus

The geographical distribution of the UK's film trade surplus was different from the export pattern, as shown in Table 3. In the years 2015-2009, while 50% of the average surplus came from the European Union, the UK's next largest film trade surplus was with Asia (21%), while the USA accounted for 12%.

Table 3 International transactions of the UK film industry by geographical area, annual average, 2015-2019

	Exports (£ million)	Imports (£ million)	Balance (£ million)	% balance
European Union	912.4	295.6	616.8	49.6
Other Europe	115.4	25.6	89.8	7.2
USA	508.0	355.2	152.8	12.3
Asia	367.0	101.4	265.6	21.4
Rest of the world	199.8	81.6	118.2	9.5
Total	**2,102.6**	**859.4**	**1,243.2**	**100.0**

Source: Office for National Statistics Annual Survey of International Trade in Services
Note: Figures may not sum to totals due to rounding.

Image: *Hope Gap* courtesy of Curzon Artificial Eye

Film industry companies, 2016-2020

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 this chapter's 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 are 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 22% between 2016 and 2020, compared to the UK all-industries average of 8% (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 53%, while there was a 17% 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 2020, there were over 8,600 film production companies, over 3,000 post-production companies, 405 film distributors and 270 film exhibitors.

Table 4 Number of companies by sub-sector, 2016-2020

Sub-sector	2016	2017	2018	2019	2020	Growth 2016-2020 (%)
Film production	7,420	8,115	8,165	8,415	8,660	16.7
Video production	2,980	3,390	3,735	4,185	4,570	53.4
Film, video and TV post-production	2,870	2,965	2,915	2,970	3,005	4.7
Film distribution	380	395	420	430	405	6.6
Video distribution	75	80	90	105	110	46.7
Film exhibition	255	255	270	275	270	5.9
Total	**13,980**	**15,200**	**15,595**	**16,380**	**17,020**	**21.7**
UK all industries	2,554,510	2,668,810	2,669,440	2,718,435	2,749,700	7.6

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2020.
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.

As Table 5 shows, total turnover for film industry companies increased by 80.5% over the period, rising from £11.5 billion to £20.7 billion.

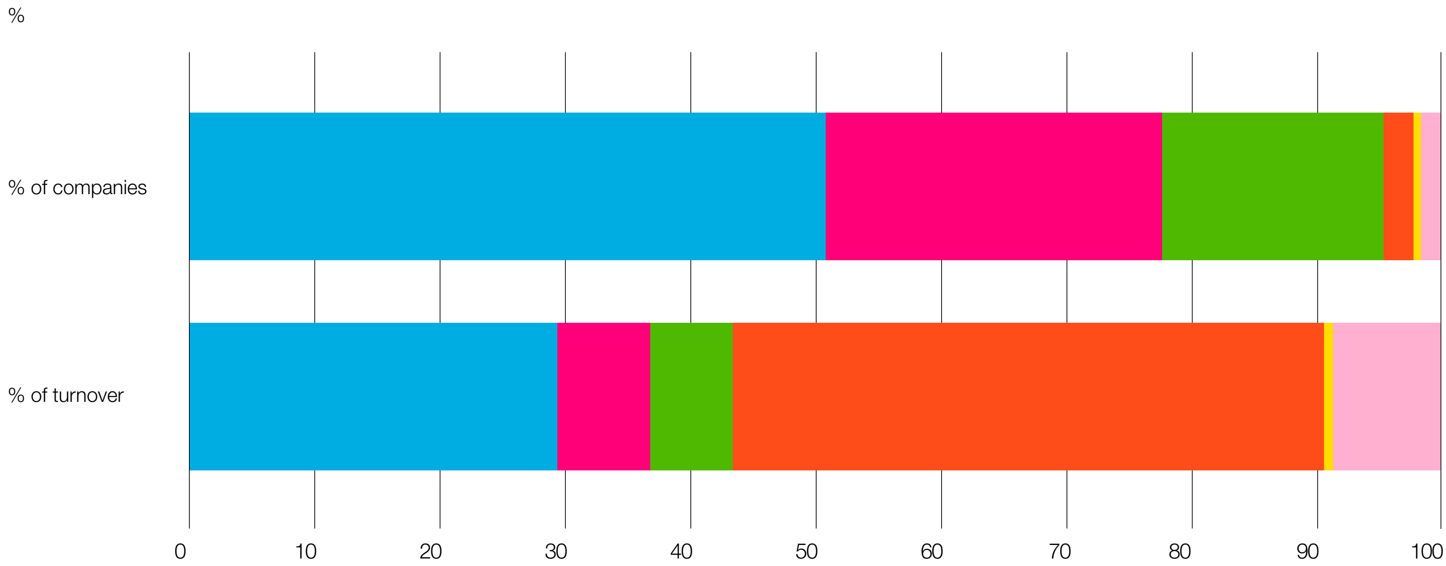
Table 5 Turnover of companies by sub-sector, £ million, 2016-2020

Sub-sector	2016	2017	2018	2019	2020	Growth 2016-2020 (%)
Film production	3,833.1	4,509.4	6,102.6	6,062.1	6,103.6	59.2
Video production	397.6	477.4	534.5	624.2	1,523.7	283.2
Film, video and TV post-production	1,309.1	1,800.6	1,844.1	1,370.4	1,374.6	5.0
Film distribution	4,306.2	4,871.3	6,788.4	9,069.5	9,803.1	127.7
Video distribution	233.5	190.8	129.5	152.8	142.8	-38.8
Film exhibition	1,405.0	1,593.1	1,614.9	1,704.1	1,779.9	26.7
Total	**11,484.4**	**13,442.6**	**17,013.9**	**18,983.0**	**20,727.7**	**80.5**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Figures may not sum to totals due to rounding.
See notes to Table 4.

Film distributors represented 2% of film industry companies in 2020 but accounted for 47% 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 51% of companies and 29% of turnover.

Figure 12 Percentage of film and video companies and turnover by sub-sector, 2020



	% of companies	% of turnover
Film production	50.9	29.4
Video production	26.9	7.4
Film, video and TV post-production	17.7	6.6
Film distribution	2.4	47.3
Video distribution	0.6	0.7
Film exhibition	1.6	8.6

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 2020 is shown in Tables 6 to 9. In most sectors the majority of companies had an annual turnover of less than £250,000. Excepting the film production sector, where data have been made confidential, 93% of turnover was accounted for by the 100 companies with turnover of £5 million or greater. The concentration was particularly high in film distribution (Table 8) where the 35 largest companies accounted for 99% of turnover.

Table 6 Size distribution of film production companies, 2020

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	205	2.4	c	c
1.0-4.99	460	5.3	928.2	15.2
0.5-0.99	310	3.6	c	c
0.25-0.49	740	8.5	251.8	4.1
0.1-0.24	3,165	36.5	468.1	7.7
0.05-0.09	1,960	22.6	146.5	2.4
<0.05	1,820	21.0	37.9	0.6
Total	**8,660**	**100.0**	**6,103.6**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2020.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
Figures/percentages may not sum to totals due to rounding.

Table 7 Size distribution of post-production companies, 2020

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	50	1.7	766.1	55.7
1.0-4.99	110	3.7	240.8	17.5
0.5-0.99	100	3.3	68.9	5.0
0.25-0.49	180	6.0	63.7	4.6
0.1-0.24	1,210	40.3	159.5	11.6
0.05-0.09	825	27.5	61.8	4.5
<0.05	530	17.6	13.7	1.0
Total	**3,005**	**100.0**	**1,374.6**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2020.
Figures/percentages may not sum to totals due to rounding.

Table 8 Size distribution of film distribution companies, 2020

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	35	8.6	9,661.4	98.6
1.0-4.99	35	8.6	79.6	0.8
0.5-0.99	40	9.9	25.6	0.3
0.25-0.49	50	12.3	17.6	0.2
0.1-0.24	75	18.5	12.0	0.1
0.05-0.09	75	18.5	5.4	0.1
<0.05	95	23.5	1.6	<0.1
Total	**405**	**100.0**	**9,803.1**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2020.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
Figures/percentages may not sum to totals due to rounding.

Table 9 Size distribution of film exhibition companies, 2020

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	15	5.6	1,620.6	91.1
1.0-4.99	50	18.5	105.7	5.9
0.5-0.99	40	14.8	27.7	1.6
0.25-0.49	45	16.7	13.9	0.8
0.1-0.24	55	20.4	8.5	0.5
0.05-0.09	35	13.0	2.8	0.2
<0.05	30	11.1	0.7	<0.1
Total	**270**	**100.0**	**1,779.9**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2020.
Figures/percentages may not sum to totals 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 2020. In total, 70% of film companies were concentrated in London and the South East, and 87% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (59% of companies and 99% of turnover) but the exhibition sector was more widely spread across the UK, with 72% 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, 2020

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
England	8,155	94.1	2,830	94.2	385	95.1	230	85.2	11,600	94.0
London	4,685	54.1	1,520	50.6	240	59.3	75	27.8	6,520	52.8
South East	1,445	16.7	560	18.6	80	19.8	40	14.8	2,125	17.2
East	645	7.4	230	7.7	20	4.9	25	9.3	920	7.5
South West	495	5.7	190	6.3	10	2.5	25	9.3	720	5.8
North West	280	3.2	125	4.2	10	2.5	20	7.4	435	3.5
Yorkshire and The Humber	210	2.4	60	2.0	5	1.2	15	5.6	290	2.3
West Midlands	185	2.1	70	2.3	10	2.5	15	5.6	280	2.3
East Midlands	150	1.7	55	1.8	5	1.2	10	3.7	220	1.8
North East	60	0.7	20	0.7	5	1.2	5	1.9	90	0.7
Scotland	245	2.8	85	2.8	10	2.5	15	5.6	355	2.9
Wales	170	2.0	65	2.2	5	1.2	15	5.6	255	2.1
Northern Ireland	95	1.1	25	0.8	5	1.2	10	3.7	135	1.1
UK	**8,660**	**100.0**	**3,005**	**100.0**	**405**	**100.0**	**270**	**100.0**	**12,340**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2020.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.
Figures/percentages may not sum to totals due to rounding.

Table 11 National/regional distribution of film company turnover, 2020

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£ million)	%	Turnover (£ million)	%	Turnover (£ million)	%	Turnover (£ million)	%	Turnover (£ million)	%
England	5,848	95.8	1,317	95.8	9,789	99.9	1,719	96.6	18,672	98.0
London	4,234	69.4	1,049	76.3	9,670	98.6	1,032	58.0	15,985	83.9
South East	414	6.8	123	8.9	51	0.5	17	0.9	605	3.2
East	828	13.6	38	2.8	36	0.4	29	1.6	931	4.9
South West	152	2.5	42	3.0	3	<0.1	31	1.8	228	1.2
North West	98	1.6	c	c	3	<0.1	c	c	101	0.5
Yorkshire and The Humber	58	1.0	12	0.9	c	c	c	c	70	0.4
West Midlands	27	0.4	10	0.7	c	c	5	0.3	42	0.2
East Midlands	27	0.4	c	c	c	c	c	c	27	0.1
North East	9	0.1	3	0.2	c	c	c	c	12	0.1
Scotland	51	0.8	21	1.6	c	c	20	1.1	92	0.5
Wales	51	0.8	31	2.3	c	c	c	c	82	0.4
Northern Ireland	154	2.5	c	c	c	c	37	2.1	191	1.0
UK	**6,104**	**100.0**	**1,375**	**100.0**	**9,803**	**100.0**	**1,780**	**100.0**	**19,061**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register
Notes:
Data as at March 2020.
'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.
Figures/percentages may not sum to totals due to rounding.

Glossary

Alternative content
See Event cinema

Animation television programme
Within this Yearbook, the animation television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief the production must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, and at least 51% of its total core expenditure must be on animation

Audiovisual and related services
Within the exports data provided by the ONS audiovisual and related services describe services and fees related to the production of motion pictures, radio and television programmes and musical recordings.

BAFTA
British Academy of Film and Television Arts (www.bafta.org)

BARB
Broadcasters' Audience Research Board. The organisation that compiles audience measurement and television ratings in the UK television (www.barb.co.uk)

BASE
British Association for Screen Entertainment, formerly the British Video Association. The trade body representing the interests of publishers and rights owners of pre-recorded home entertainment on digital and physical video (www.base.org.uk)

BBFC
British Board of Film Classification. Independent body responsible for classifying films and video. See Cinema film classification (www.bbfc.org.uk)

Blu-ray disc
An optical disc format that can store up to 50 Gb of data, almost six times the capacity of a dual layer DVD. It uses a short wavelength blue-violet laser to read and write information to disc

Box office
Total value of ticket sales for a film screened commercially at cinemas

Box office gross
Box office takings before deduction of Value Added Tax (VAT)

CAA
Cinema Advertising Association. The trade association for cinema advertising contractors operating in the UK and Republic of Ireland (www.cinemaadvertisingassociation.com)

Children's television programme
Within this Yearbook, the children's television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief the production must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, at least 51% of its total core expenditure must be on live action, and its primary target audience will be under the age of 15

Cinema film classification
Age rating given to a film by the British Board of Film Classification for a theatrical or video release. Indicates the film's suitability for audiences according to their age

Community cinema (community exhibition)

Voluntary providers of films bringing a variety of programming, often non-mainstream, to local communities which may have limited access to commercial cinemas

Concession revenue

Revenue from sales of food, drinks and merchandise at cinemas

Co-production

A film made by companies from more than one country, often under the terms of a bilateral co-production treaty or the European Convention on Cinematographic Co-production

Country of origin

The nationality of a film. In the case of co-productions, this may include more than one country

Creative Europe

The European Commission's framework programme for support to the culture and audiovisual sectors. It replaced the Culture and MEDIA programmes which ran from 2007-2013

DCMS

Department for Digital, Culture, Media and Sport. Government department responsible for setting UK film policy and for administering the National Lottery Distribution Fund (www.culture.gov.uk)

Digital projection

The projection of a film onto a cinema screen using a digital master and a digital projector, i.e. using electronic signals to direct light onto the screen rather than passing light through a celluloid strip

Digital video

A term used by the BFI Research and Statistics Unit to describe Video on Demand (VoD), a system that allows users to stream or download a film from a digital platform to view on a television set, PC or mobile device. See Video on Demand

Distributor

A person or company that acquires the right to exploit the commercial and creative values of a film in the theatrical, video and television markets. Also undertakes the promotional and marketing activities to attract audiences to a film

Domestic box office

Typically refers to the USA and Canada box office and revenue from the films given theatrical release in this territory. See Local box office

Domestic UK feature

A domestic (indigenous) UK feature is a film made by a UK production company that is produced wholly or partly in the UK, where the majority of the film's budget is from UK sources

Download to Own (DTO)

A type of Video on Demand business model which allows users to purchase permanent film downloads for storage on a hard drive, and in some cases to burn an additional copy to DVD. Also known as Electronic Sell Through (EST).

Download to Rent (DTR)

A type of Video on Demand business model which allows users to download content to view within a limited time period (often up to 48 hours following the first play).

DVD – Digital versatile disc

A digital optimal disc storage format capable of being viewed on different types of players

EEA spend

The value of all production expenditure, from pre-production to completion, on activity incurred in the European Economic Area

Electronic Sell Through (EST)

See Download to Own (DTO)

English Regions

Formerly known as Government Office Regions (GORs) they were an administrative classification used to establish the boundaries of the Regional Development Agencies and the Regional Screen Agencies. In 2011 the administrative function of GORs was abolished but the areas were kept for statistical purposes and are now known just as 'Regions'

Event cinema

Also known as 'alternative content'. Non-feature film programming in cinemas, such as the live screening of events or performances happening elsewhere. Event cinema has become a regular feature of some UK cinemas in recent years, and has been made possible by the availability of digital projection

Exhibitor

A cinema operator that rents a film from a distributor to show to a cinema audience. See Film rental

Feature film

A film made for cinema release, rather than a film made for television, and usually of at least 80 minutes duration

Film download

A digital version of a film transferred (either officially or unofficially) from the internet to a personal computer or mobile device. Downloads may also go directly to television sets via games consoles, internet protocol television or dedicated set-top boxes

Film rental

The sum of money paid to the distributor by the exhibitor in return for the right to show a particular film. Usually calculated as a percentage of net box office

Film tax relief

Tax relief on film production costs available for British qualifying films. To access the relief a film must qualify as British under the relevant cultural test or as an official co-production, with the intention of being released for theatrical exhibition.

Franchise

A film series such as *Harry Potter and the Philosopher's Stone* and its sequels

GCE – General Certificate of Education

A subject specific academic qualification comprising Advanced Level (A Level) and Advanced Subsidiary Level (AS Level) available principally in England, Wales and Northern Ireland (Scottish equivalent is the Higher qualification)

GCSE – General Certificate of Secondary Education

A subject specific academic qualification awarded, generally taken by students aged 14-16 in secondary education in England, Wales and Northern Ireland (Scottish equivalent is the National qualification)

GDP – Gross Domestic Product

A measure of a country's income and output. GDP is defined as the total market value of all final goods and services produced within the country in a given period of time. GDP is also the sum of the value added at each stage of the production process. 'Gross' refers to the fact that GDP includes capital investment but does not subtract depreciation

Genre

A style or category of film defined on the basis of common story and cinematic conventions (e.g. action, crime, drama, etc)

Global box office

See worldwide box office

Grant-in-aid

A payment by a public sector funder (normally a central government department) to finance all or part of the costs of the body in receipt of the grant-in-aid. Grant-in-aid is paid where the government has decided, subject to parliamentary controls, that the recipient body should operate at arm's length

GVA – Gross Value Added

The amount that individual businesses, industries or sectors contribute to the economy. Broadly, this is measured by the income generated by the business, industry or sector less their intermediate consumption of goods and services used in order to produce their output. GVA consists of labour costs (for example, wages and salaries) and an operating surplus (or loss). The latter is a good approximation to profits. The cost of capital investment, financial charges and dividends to shareholders are met from the operating surplus

High-end television (HETV) programme

Within this Yearbook, the high-end television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief a production must qualify as British under the relevant cultural test or as an official co-production, it is a drama (which includes comedy) or documentary production that must be intended for broadcast on television and/or the internet and have an average core expenditure per hour of slot length of not less than £1 million. (The slot length in relation to HETV programmes must be greater than 30 minutes)

Higher (Scottish)

In Scotland, the Higher is one of the national school-leaving certificate exams and university entrance qualifications of the Scottish Qualifications Certificate offered by the Scottish Qualifications Authority

HMRC

Her Majesty's Revenue and Customs. The government department charged with collecting revenue on behalf of the Crown

HMT

Her Majesty's Treasury. The government department responsible for formulating and implementing the Government's financial and economic policy

Independent film

A film produced without creative or financial input from the major US studio companies. These are: Fox Entertainment Group (now owned by Walt Disney), NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Intellectual property

Within the exports data provided by the ONS intellectual property includes trade-marks, franchises, brands and design rights; copyrighted works, sound recordings, films, television programmes; and royalties.

Intermediate (Scottish)

In Scotland, the Intermediate was one of the national secondary school certificate qualifications offered by the Scottish Qualifications Authority. These have been replaced by National Qualifications

Inward investment feature

A term used by the BFI Research and Statistics Unit to denote a feature film which is substantially financed and controlled from outside the UK and which is attracted to the UK by script requirements (e.g. locations) and/or the UK's filmmaking infrastructure and/or UK film tax relief

ISBA TV regions

System for classifying regions developed by the Incorporated Society of British Advertisers for use by the advertising industry (www.isba.org.uk)

Local box office

Typically describes a particular country or territory's box office and revenue from films given a theatrical release in that country or territory when referenced from the perspective of that country or territory. See Domestic box office

Mainstream programming

Category of films aimed at the general audience

Mbps

Megabits per second. A data transfer rate of one million bits per second

Mean

A statistical term for the average of a set of values, which is calculated by summing the values and then dividing by the count of the values

Median

A statistical term meaning the middle value in an ordered set of values. Half of the values fall below the median, and half of the values fall above the median

Mixed-use venue

An arts venue which screens films on a part-time basis alongside other activities such as concerts and plays

Multiplex site

Defined by the BFI RSU as a purpose-built cinema with five or more screens

Multi-channel television

Digital television programming carried by satellite, cable or freeview delivery systems, in this case excluding the five main network channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5)

National Qualifications (Scottish)

In Scotland, the National Qualification are one of the secondary school certificate exams offered by the Scottish Qualifications Authority. These have replaced Intermediate and Standard Grade certificate qualifications. National Qualifications are usually taken by learners in the senior phase of secondary school (S4 to S6) and learners in colleges, including adult learners

Net box office

Box office takings after deduction of VAT

Online DVD rental

Selecting and renting DVDs via a website for postal delivery

ONS

Office for National Statistics. Executive office of the UK Statistics Authority, responsible for the production of official statistics in the UK (www.ons.gov.uk)

Over the top (OTT)

Over the top describes streamed or downloaded media content delivered via the internet without the involvement of a multiple-system operator

Out of town cinema

Cinema located on the outskirts of a town, typically in a large shopping development

PAYE

Pay as you earn. A method of collecting income tax and national insurance where these are deducted at source by the employer and remitted to HMRC

Pay TV

A satellite or cable television system in which viewers pay a subscription to access television content including feature films

Physical video

Refers to the various physical formats on which video can be distributed, such as VHS, DVD, Blu-ray, etc

Post-production

All stages of film production occurring after the shooting of raw footage. These typically include: editing the picture, adding the soundtrack, adding visual special effects and sound effects and preparing a final cut

Principal photography
The phase of film production in which the movie is filmed, with actors on set and cameras rolling, as distinct from pre-production and post-production

Pre-production
All stages of film production occurring once a film has been greenlit and before the shooting of raw footage. This typically includes: recruitment of crew, location scouting, set construction and scheduling

Producer
A film producer oversees and delivers a film project to all relevant parties while the integrity, voice and vision of the film

Reach
The total number of different people who have consumed, at least once, a medium, or element of that medium (such as a programme) during a given period. Reach is typically presented either as the number of people exposed in thousands or millions, or as that number expressed as a percentage of that group's total population.

Rental VoD
A type of Video on Demand business model which involves a one-off rental of an individual film title for a limited period of time, also known as Download to Rent (DTR).

Sites
Individual cinema premises

Smart TV
A television set or set-top box connected to the internet that uses internet digital protocols to communicate data

Social group / Social grade
A section of the population defined by class group and employment status, based on a classification used by the Market Research Society. The 'AB' social group refers to people in the Upper Middle and Middle class groups, in higher and intermediate managerial jobs. The 'C1' social group refers to people in in the Lower Middle class group, with supervisory or junior managerial jobs. The 'C2' social group refers to people in the Skilled Working class group, who are categorised as skilled manual workers. The 'DE' social group refers to those in the Working class group or those at the lowest level of subsistence, who are semi-skilled manual workers, in receipt of a state pension, in casual employment or the lowest grade jobs

South Asian films
Films originating from South Asia, for example Bollywood, and generally, though not exclusively, aimed at a South Asian audience and in a South Asian language

Specialised films
Defined by the BFI RSU as documentaries, foreign language films, and re-releases.

Standard Industrial Classification (SIC)
A system used by the Office for National Statistics to classify businesses according to the type of their economic activity

Statistically significant
A finding that is the result of a quantitative investigation or data analysis that is unlikely to be due to chance

Streaming
The transmission of audiovisual content that is constantly received by and presented to a user at the same time as it is being delivered by the provider. The client media player can start playing the data before the entire file has been transmitted

Studio-backed film
A film produced with creative and/or financial input from the major US studio companies. These are: Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Subscription VoD (SVoD)
A type of Video on Demand business model based on a subscription payment (usually monthly) in return for unlimited access to content.

Terrestrial television
The five main free-to-air channels: BBC One, BBC Two, ITV, Channel 4 and Channel 5

Traditional cinema
Defined by the BFI RSU as a cinema with fewer than five screens

Transactional VoD (TVoD)
A description of Video on Demand business models based on transactions of individual titles such as Download to Rent or Download to Own.

Turnover
The revenue that a company receives from its normal business activities during a period of time, usually from the sale of goods and services to customers

UK and Republic of Ireland
The distribution territory comprising the UK and Republic of Ireland. Where this publication indicates a film has been released 'in the UK and Republic of Ireland' it refers to the distribution territory and not necessarily to an actual release in both countries

UK film
A film which is certified as such by the UK Secretary of State for Culture, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production; or a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent; or (in the case of a re-release) a film which met the official definition of a British film prevailing at the time it was made or was generally considered to be British at that time

UK spend
The value of production expenditure, from pre-production through to completion, on activity incurred in the UK for films and programmes applying for one of the creative sector tax reliefs as a UK qualifying production under the relevant cultural test. For films and programmes qualifying as British under one of the UK's bi-lateral treaties or the European Convention on Cinematographic Co-production, the UK spend includes all production costs incurred by the UK film production company

US studio
See studio-backed film

VFX
Visual effects. The various processes by which imagery is created and/or manipulated outside of live action material

Video game
Within this Yearbook, the video games referred to are those which have accessed or intend to access the relevant UK creative industry tax relief; they are defined by HMRC as electronic games intended to be played through a video device. To access the relief a video game must qualify as British under the video games cultural test

Video on Demand (VoD)
A system that allows users to select and watch films (or other content) on a television set, PC or mobile device at the time they want over an interactive network. See Digital video

Width of Release
The maximum number of cinema sites a film had been distributed to.

Worldwide box office
Refers to the box office across all global territories and total global box office revenues. Within the Yearbook, worldwide box office is used interchangeably with global box office

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