SCREEN SECTOR PRODUCTION

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Cover image: *Louis Wain* courtesy of StudioCanal

FACTS IN FOCUS

The value of feature film and UK qualifying high-end television production spend in the UK in 2019 was £3.62 billion. The UK production spend of qualifying animation and children's television programmes was £111.5 million, and the UK spend of qualifying video games was £34 million.

- The value of film production activity in the UK in 2019 was £1.95 billion, up 6% from £1.84 billion in 2018.
- There were 93 domestic UK features (177 in 2018), 23 co-productions (21 in 2018) and 69 inward investment features (59 in 2018).
- The UK spend associated with inward investment features was £1.74 billion, up 17% from £1.49 billion in 2018.
- Twenty-two big budget films (£30 million or over) accounted for 78% of total UK film production spend. Twenty-one of these films were inward investment projects.
- The UK spend associated with high-end television (HETV) programmes in 2019 was £1.67 billion, up 29% from £1.29 billion in 2018.
- There were 49 domestic UK HETV projects (70 in 2018) and 74 co-production and inward investment projects (72 in 2018).
- The UK spend of qualifying animation television programmes was £39.5 million, down 31% from £57 million in 2018.
- The UK spend of qualifying children's television programmes was £72 million, down 36% from £113 million in 2018.
- Video games development generated a UK spend of £34 million, from 24 projects.

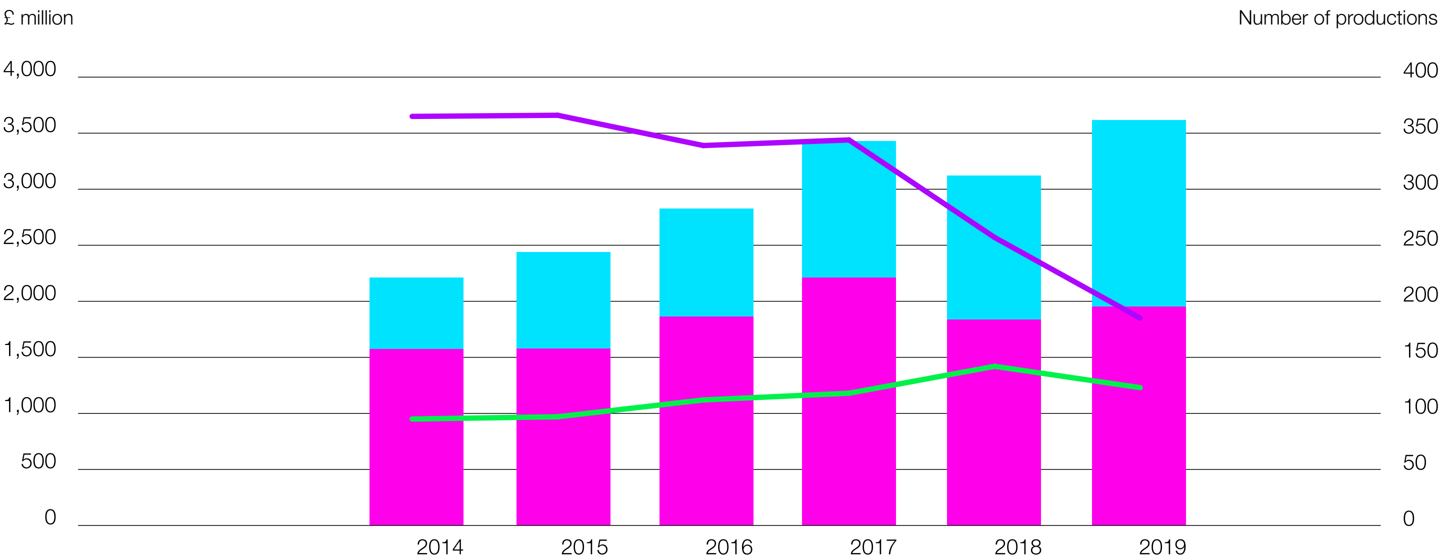
SCREEN SECTOR PRODUCTION

FILM AND HETV PRODUCTION

In 2019, the spend on feature film and high-end television (HETV) production in the UK reached a record high of £3.62 billion. As Figure 1 shows, this combined total is 16% higher than in 2018 and 63% higher than in 2014, the first full calendar year following the introduction of the tax relief for UK qualifying HETV production. This new chart illustrates the importance of the UK as a global centre of production for the screen industries and highlights the increasing value of HETV production to the UK's audiovisual economy. Between 2014 and 2019, the UK spend associated with HETV production increased from £640 million to £1.67 billion, and as a proportion of the aggregate UK production value of the two sectors, increased from 29% to 46%.

In total, 308 feature films and HETV projects began principal photography in the UK in 2019. While this is the lowest number of productions reported during the period, it should be noted that there is often a delay in acquiring full data on production activity in the UK, so the figures for the last few years are likely to be revised upwards (see notes to Figure 1).

Figure 1 Total value and volume of film and HETV productions, 2014-2019



	2014	2015	2016	2017	2018	2019
UK spend HETV (£ million)	640.0	861.3	964.3	1,220.8	1,287.6	1,665.1
UK spend film (£ million)	1,572.1	1,575.7	1,861.5	2,210.3	1,834.9	1,950.6
Total UK spend (£ million)	**2,212.1**	**2,436.9**	**2,825.8**	**3,431.1**	**3,122.5**	**3,615.7**
Number of HETV productions	95	97	112	118	142	123
Number of film productions	365	366	339	344	257	185
Total number of productions	**460**	**463**	**451**	**462**	**399**	**308**

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.
Data are reported from 2014 as it is the first full calendar year following the introduction of the tax relief for UK qualifying HETV programmes.
Figures for recent years are likely to be amended upwards in the future as more production data become available. The total number of film and HETV productions reported in the 2019 Statistical Yearbook was 349; this has been revised upwards to 399 productions.

THE VALUE OF UK FILM PRODUCTION, 2010-2019

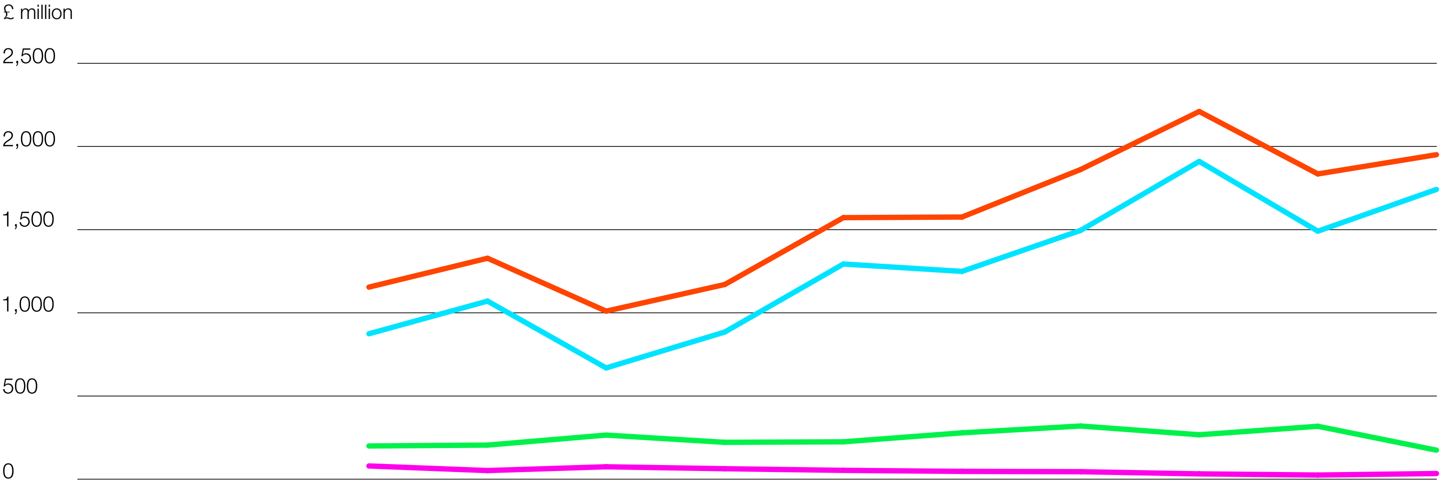
As Figure 2 shows, the aggregate UK spend of feature films that commenced principal photography in 2019 was £1.95 billion, up 6% on 2018 and second only to the high of £2.21 billion achieved in 2017. This was the sixth consecutive year to see record or near-record values for UK film production activity. The high figures of these years coincide with the extended tax relief for film introduced by the UK government in 2014.

The increase in UK film production spend since 2014 is due primarily to a surge in expenditure from inward investment films. In 2019, inward features contributed £1.74 billion towards the total UK production value, an increase of 17% from £1.49 billion in 2018, and the second highest figure on record. The proportion of overall UK spend attributed to inward investment productions was 89%, up from 81% in 2018. Inward investment films shooting in the UK in 2019 included *1917*, *Louis Wain* and *No Time to Die*.

Domestic UK features shooting in 2019, which included *Blue Story, Emma* and *Last Night in Soho*, had a UK production value of £174.5 million, down from £319 million in 2018, and the lowest of the decade shown in the chart. The drop in UK spend for these films reflects, in part, a more challenging landscape for domestic UK production. It should be noted, however, that features being made by British filmmakers often attract international finance and are therefore classified as inward investment films, for example, Sam Mendes's *1917*. It should also 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 2019 was £34 million, up from £25 million in 2018. Co-productions commencing principal photography in the year included *Boys from County Hell, Escape from Pretoria* and *Skylines.*

Figure 2 UK spend of feature films produced in the UK, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Inward Investment	873.9	1,070.5	668.6	884.4	1,293.5	1,249.2	1,495.6	1,910.4	1,490.9	1,741.9
Domestic UK	199.8	205.1	265.7	221.9	225.0	279.2	320.6	267.6	318.9	174.5
Co-production	80.5	52.4	75.5	63.7	53.6	47.3	45.4	32.2	25.0	34.2
Total	**1,154.2**	**1,328.0**	**1,009.8**	**1,170.0**	**1,572.1**	**1,575.7**	**1,861.5**	**2,210.3**	**1,834.9**	**1,950.6**

Source: BFI

Notes:

Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown and include only the UK spend associated with productions shot or post-produced partly or wholly in the UK.

Spend is allocated to the year in which principal photography 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.

Figures may not sum to totals due to rounding.

Data updated since publication of the 2019 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 1 shows the split between UK studio-backed films and UK and foreign independent films made partly or wholly in the UK. In 2019, UK studio-backed films accounted for 68.5% (£1.29 billion) of overall production spend in the UK, a slight decline from 69% (£1.27 billon) in 2018.

Table 1 UK spend of UK studio-backed and independent films produced in the UK, 2010-2019, £ million

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK studio-backed films*	815.9	1,015.7	654.2	758.1	1,010.2	1,155.1	1,183.5	1,580.1	1,269.7	1,285.4
Independent films**	338.4	312.3	355.5	412.0	561.9	420.6	678.0	630.2	565.1	665.2
Total	**1,154.2**	**1,328.0**	**1,009.8**	**1,170.0**	**1,572.1**	**1,575.7**	**1,861.5**	**2,210.3**	**1,834.9**	**1,950.6**
% UK studio-backed films	70.7	76.5	64.8	64.8	64.3	73.3	63.6	71.5	69.2	68.5

Source: BFI

Notes:

The categories in this table differ to those of 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 sourced material.

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

Figures may not sum to totals due to rounding.

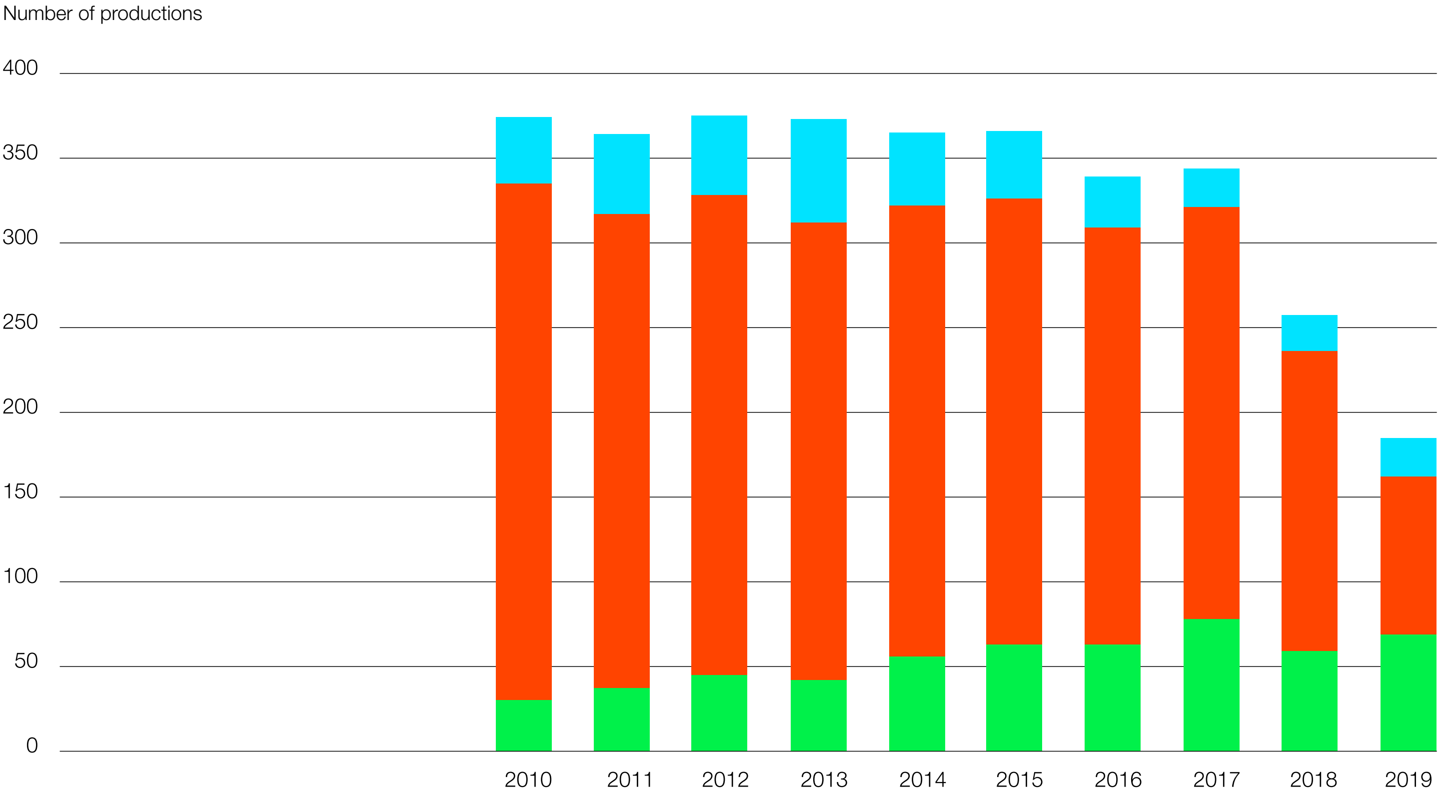
Data updated since publication of the 2019 Statistical Yearbook.

THE VOLUME OF UK FILM PRODUCTION, 2010-2019

In 2019, 185 films were produced wholly or in part in the UK, down from 257 in 2018. Of these, 23 were co-productions, 93 were domestic UK features (of which 45 had budgets of less than £500,000) and 69 were inward investment films (Figure 3). While the numbers of both co-productions and inward investment titles were up compared with 2018, there was a significant decrease in the volume of domestic UK films. Although this is partly due to a downturn in the level of domestic UK production, as previously noted there is often a delay in acquiring full data on production activity in the UK, so the number for 2019 is likely to be revised upwards.

Looking at the decade covered in the chart, the influence of the extended tax relief for film introduced in 2014 is evident, with the number of inward investment films shooting in the UK increasing from an annual average of 39 (2010-2013) to 65 (2014-2019). The chart also shows an overall decline in the number of co-productions, which has fallen from an annual average of 49 (2010-2013) to 30 (2014-2019). The volume of domestic UK productions has declined every year since 2012, driven principally by a fall in the number of productions with budgets of less than £500,000. Current data show the number of these productions decreasing from over 200 in 2012 to less than half that in both 2018 and 2019.

Figure 3 Number of feature films produced in the UK, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Inward investment	30	37	45	42	56	63	63	78	59	69
Domestic UK	305	280	283	270	266	263	246	243	177	93
Of which budget ≥ £500,000	77	91	77	71	84	94	95	84	94	48
Of which budget < £500,000	228	189	206	199	182	169	151	159	83	45
Co-production	39	47	47	61	43	40	30	23	21	23
Of which majority and parity co-production	25	24	25	35	19	18	10	12	5	8
Of which minority co-production	14	23	22	26	24	22	20	11	16	15
Total	**374**	**364**	**375**	**373**	**365**	**366**	**339**	**344**	**257**	**185**

Source: BFI RSU

Notes:

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

Includes both official and unofficial co-productions.

Data updated since publication of the 2019 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 2 shows that UK and non-UK originated independent films represented just under 91% of all films produced in the UK in 2019, a similar share to 2018. The number of UK studio-backed films (17) was the fifth highest of the 10-year period covered in the table. (These films account for the majority of UK production spend). While the low number of non studio-backed films (168) reported for 2019 is partly explained by the time-lag in obtaining full production data, some of the decrease reflects a downturn in the volume of domestic UK film production which makes up a sizeable proportion of this category.

Table 2 Number of UK studio-backed and independent films produced in the UK, 2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK studio-backed films*	15	18	15	16	16	24	16	20	22	17
Independent films**	359	346	360	357	349	342	323	324	235	168
Total	**374**	**364**	**375**	**373**	**365**	**366**	**339**	**344**	**257**	**185**
% UK studio-backed films	4.0	4.9	4.0	4.3	4.4	6.6	4.7	5.8	8.6	9.2

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 2019 Statistical Yearbook.

Image: *Blue Story* courtesy of Paramount Pictures

FILM PRODUCTION BY GENRE, 2017-2019

Table 3 and Figure 4 show a breakdown of UK film production by genre for the years 2017-2019. The documentary and drama genres accounted for the largest proportion of films shot in the three-year period, at 21% and 18% respectively, but only 1% and 7% of total UK spend. The only other genre to exceed 10% of total productions was comedy, which accounted for 11% of films and 6% of UK spend. The biggest spending genre was action which accounted for 40% (£2.4 billion) of overall UK spend but only 8% of films.

Table 3 Genre of film production in the UK, 2017-2019 (ranked by UK spend)

	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	60	7.6	4,193.6	44.5	2,415.9	40.3
Drama	143	18.2	659.7	7.0	424.8	7.1
Fantasy	12	1.5	460.9	4.9	382.9	6.4
Comedy	84	10.7	474.7	5.0	372.2	6.2
Animation	12	1.5	592.7	6.3	322.3	5.4
Biopic	31	3.9	359.3	3.8	287.8	4.8
Family	9	1.1	435.7	4.6	272.2	4.5
Musical	10	1.3	336.9	3.6	255.5	4.3
Adventure	13	1.7	450.8	4.8	244.1	4.1
Thriller	77	9.8	472.7	5.0	269.1	4.5
Crime	35	4.5	259.1	2.8	190.1	3.2
Sci-fi	19	2.4	232.8	2.5	188.0	3.1
War	10	1.3	143.5	1.5	126.5	2.1
Romance	36	4.6	174.2	1.8	110.1	1.8
Documentary	164	20.9	93.8	1.0	76.5	1.3
Horror	65	8.3	66.2	0.7	49.2	0.8
Mystery	6	0.8	12.0	0.1	8.4	0.1
Total	**786**	**100.0**	**9,418.6**	**100.0**	**5,995.8**	**100.0**

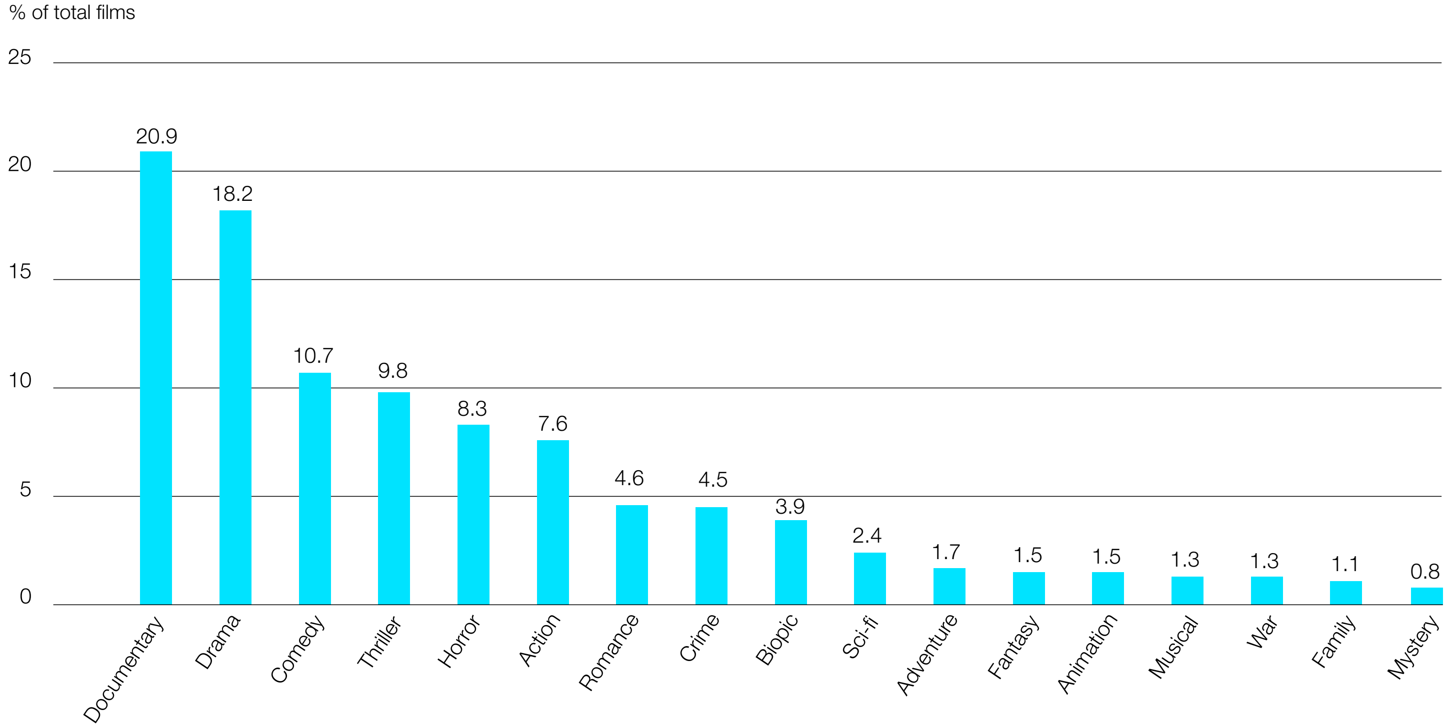
Source: BFI

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, 2017-2019



Source: BFI

See notes to Table 3.

Table 4 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 – comedy, drama and biopic – accounted for 48% of total UK production value for these films, while a single genre for inward investment/co-production films – action – accounted for 45% of the UK production value for this category.

Table 4 Top 10 genres for domestic UK and inward investment/co-production films, 2017-2019 (ranked by % UK spend)

Domestic UK		
Genre	**% of films**	**% of UK spend**
Comedy	9.9	22.1
Drama	17.9	15.8
Biopic	2.3	9.8
Thriller	9.2	9.7
Documentary	28.3	8.3
Action	4.3	8.0
Crime	4.9	6.1
Horror	11.5	4.8
Sci-fi	2.3	3.2
Animation	0.4	2.3
Total top 10	91.0	90.1
Total other genres	9.0	9.9
Total films = 513		

Inward investment & co-production		
Genre	**% of films**	**% of UK spend**
Action	14.2	45.0
Fantasy	2.5	7.2
Animation	3.6	5.8
Drama	18.5	5.8
Family	1.5	4.9
Musical	1.5	4.6
Adventure	2.5	4.5
Biopic	6.9	4.1
Comedy	12.0	3.9
Sci-fi	2.2	3.1
Total top 10	65.4	88.9
Total other genres	34.6	11.1
Total films = 273		

Source: BFI

Notes:

The data have been limited to the top 10 ranking genres due to disclosure reasons.

See notes to Table 3.

BUDGET TRENDS, 2010-2019

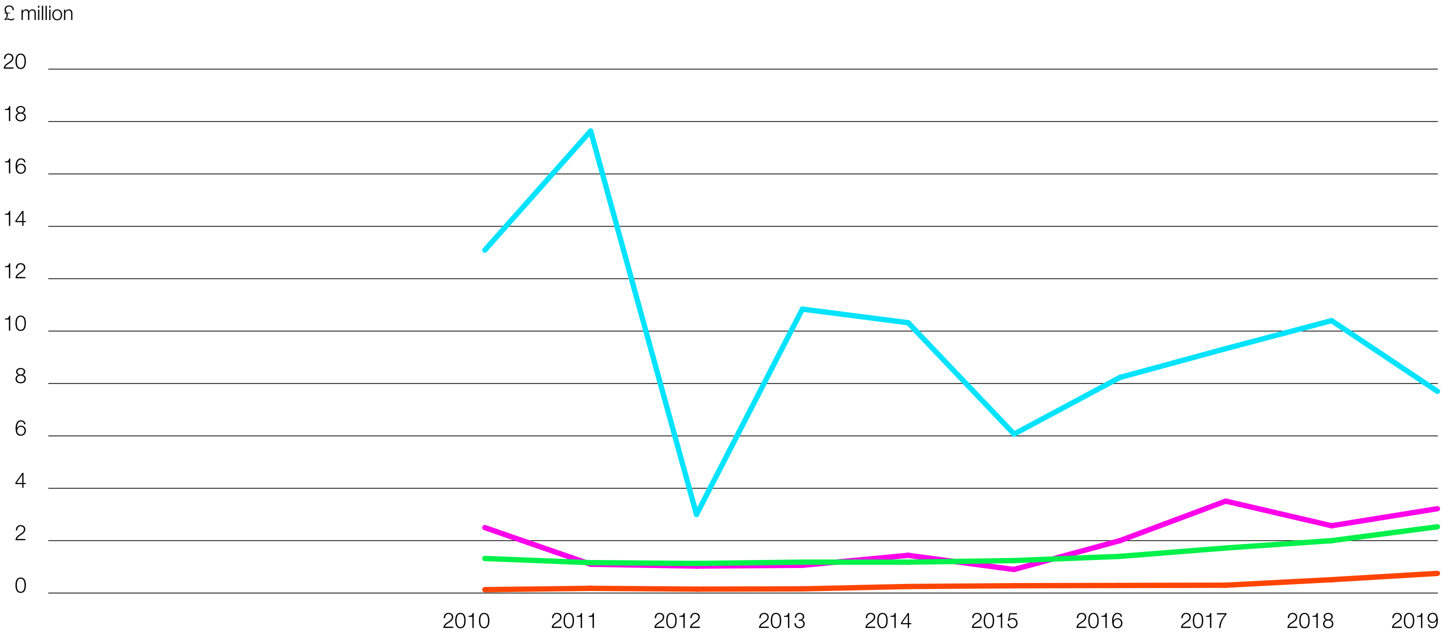
Figure 5 shows the median budget for inward investment films, co-productions and domestic UK features between 2010 and 2019. It also includes data on median budgets for domestic UK films excluding those with budgets of less than £500,000.

While the median budget of inward investment features has shown the greatest fluctuation over the period, there has been greater consistency from 2013, with the median ranging from a low of £6.1 million to a high of £10.8 million. In 2019, the median for inward features was £7.7 million, down from £10.4 million in 2018.

The median budget for co-productions averaged around £1.4 million between 2010 and 2016, but increased to over twice that between 2017 and 2019 (£3.1 million). However, the rise in the median for co-productions is likely due to the smaller numbers of films produced in these three years, as with low numbers the median is more susceptible to the effects of individual budgets. In 2019, the median for co-productions was £3.2 million, up from £2.6 million in 2018.

The median budget for domestic UK productions overall has shown a significant increase over the period, rising by a factor of four, from £130,000 in 2010 to £750,000 in 2019. Looking just at the median for UK domestic films with budgets of £500,000 or over shows a less steep increase over the period, with a rise from £1.3 million in 2010 to £2.5 million in 2019. It should be noted, however, that the median budgets for domestic UK films for the most recent years are likely to be revised downwards as more data on production activity become available.

Figure 5 Median feature film budgets, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Inward investment	13.09	17.64	3.00	10.84	10.32	6.07	8.23	9.33	10.40	7.70
Domestic UK - all productions	0.13	0.18	0.15	0.16	0.25	0.28	0.29	0.30	0.51	0.75
Domestic UK with budgets ≥ £500,000	1.32	1.16	1.13	1.18	1.18	1.24	1.40	1.72	2.00	2.53
Co-production	2.50	1.10	1.03	1.06	1.44	0.90	2.00	3.51	2.57	3.22

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 2019 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 2019 is outlined in Tables 5 to 7.

As Table 5 shows, the 21 inward investment features with budgets of £30 million or over (30% of all inward features) accounted for 86% of the total budget for this category. There were 29 inward features with budgets of less than £5 million (42% of inward features), which accounted for 4% of the total budget for these films.

Table 5 Size distribution of budgets, inward investment features, 2019

Budget band	Number of films	Total budget in band (£ million)	% of total budget
≥£30 million	21	2,059.0	86.4
£10-£29.9 million	9	160.2	6.7
£5-£9.9 million	10	71.4	3.0
£2-£4.9 million	24	84.6	3.6
<£2 million	5	7.0	0.3
Total	**69**	**2,382.3**	**100.0**

Source: BFI

Forty-five domestic UK films (48% of all domestic UK productions) had budgets of less than £500,000 in 2019, while six films (6% of domestic UK productions) had budgets of £5 million or over (Table 6). The domestic UK features in the highest budget band accounted for 44% of this category's aggregate budget, while those in the lowest budget band accounted for 6%.

Table 6 Size distribution of budgets, domestic UK films, 2019

Budget band	Number of films	Total budget in band (£ million)	% of total budget
≥£5 million	6	84.1	44.1
£2-£4.9 million	22	73.3	41.0
£0.5-£1.9 million	20	23.1	13.7
<£0.5 million	45	10.5	6.4
Total	**93**	**190.9**	**100.0**

Source: BFI

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

Six out of 23 co-productions shooting in the UK in 2019 had budgets of £5 million or over, accounting for half of the total budget in this category (Table 7). The five co-productions with budgets of less than £2 million accounted for 9% of the aggregate budget.

Table 7 Size distribution of budgets, co-productions, 2019

<table>
<tr><th>Budget band</th><th>Number of films</th><th>Total budget in band (£ million)</th><th>% of total budget</th></tr>
<tr><td>≥£5 million</td><td>6</td><td>39.6</td><td>49.8</td></tr>
<tr><td>£2-£4.9 million</td><td>12</td><td>40.3</td><td>41.5</td></tr>
<tr><td>£0.5-£1.9 million</td><td rowspan="2">5</td><td>3.8</td><td>7.5</td></tr>
<tr><td><£0.5 million</td><td>0.6</td><td>1.2</td></tr>
<tr><td>Total</td><td>23</td><td>84.3</td><td>100.0</td></tr>
</table>

Source: BFI

Notes:

The number of co-productions with budgets under £2 million has been aggregated for disclosure reasons, due to the low numbers in the individual budget bands.

Figures may not sum to totals due to rounding.

BIG BUDGET PRODUCTIONS, 2010-2019

The increasing importance to the UK film economy of a small number of big budget productions – usually inward investment films – is demonstrated in Table 8. 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. This compares to an average of 14 big budget films produced annually from 2010 to 2013, with an average share of 70% of UK spend.

In 2019, the 22 films with budgets of £30 million or over accounted for 78% of UK production spend, up from 72% in 2018, and the joint second highest share of UK production value attributed to big budget films since our records began. The majority (21) of these films were inward investment features.

Table 8 Big budget films' contribution to UK spend, 2010-2019

	Number of films with budgets ≥£30 million	Value of associated UK spend (£ million)	Total UK spend (£ million)	Big budget film % of UK spend
2010	12	822.0	1,154.2	71.2
2011	17	1,009.8	1,328.0	76.0
2012	10	634.3	1,009.8	62.8
2013	16	817.0	1,170.0	69.8
2014	20	1,157.1	1,572.1	73.6
2015	16	1,119.4	1,575.7	71.0
2016	25	1,453.1	1,861.5	78.1
2017	28	1,767.1	2,210.3	79.9
2018	20	1,324.1	1,834.9	72.2
2019	22	1,527.3	1,950.6	78.1

Source: BFI

Note: Data updated since publication of the 2019 Statistical Yearbook.

UK SPEND AS PERCENTAGE OF TOTAL PRODUCTION BUDGET

Table 9 shows UK spend as a percentage of total production budget for inward investment films, domestic UK films and co-productions over the past decade. UK domestic films have consistently had the highest proportion of UK spend while co-productions have had the lowest. The greatest variation in UK spend as a percentage of total budget, however, is seen in inward investment productions. In 2019, the UK spend of domestic films was 91% of total budget, for inward investment films it was 73%, and for co-productions it was 40.5%.

Table 9 UK spend as percentage of total production budget, 2010-2019

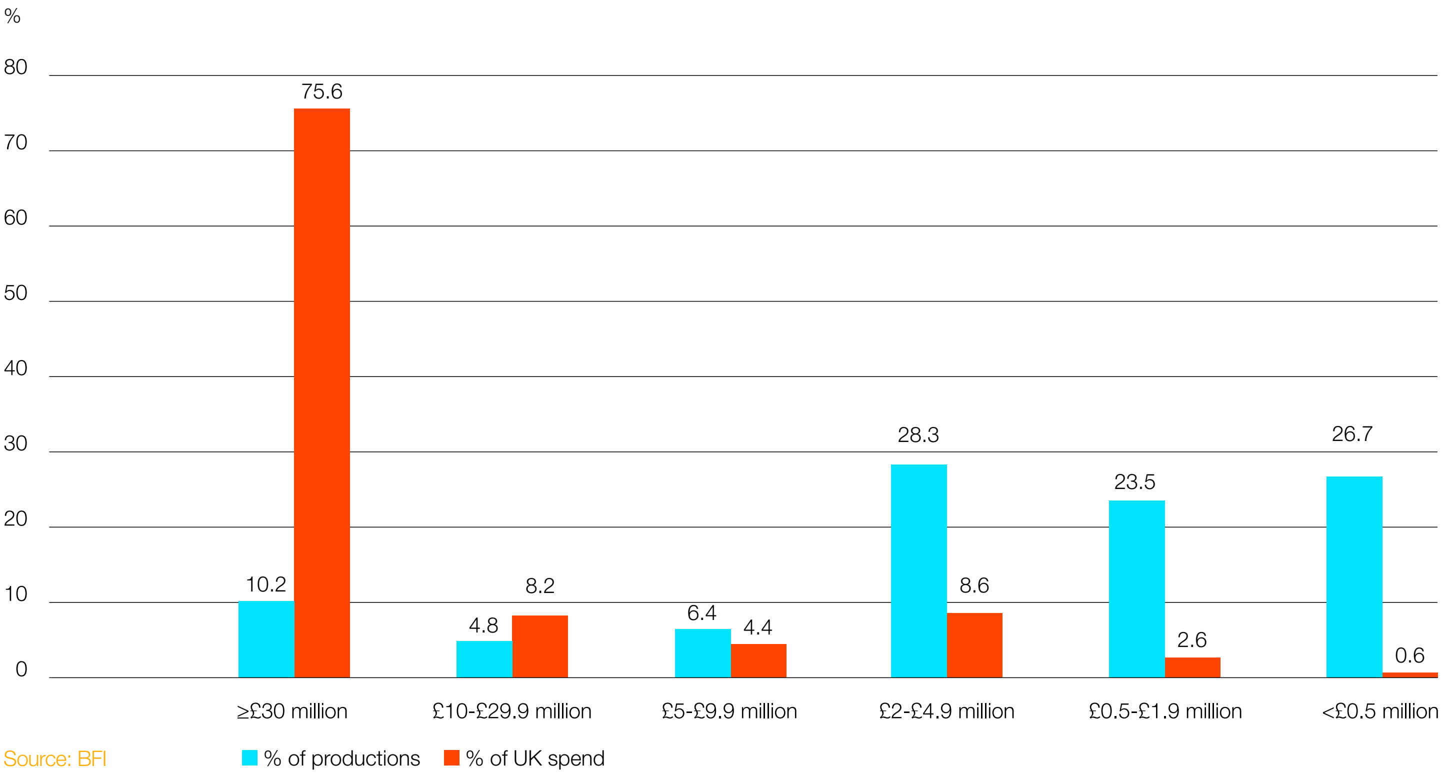
	Inward investment	Domestic UK	Co-production
2010	71.9	89.9	42.1
2011	55.9	86.7	36.0
2012	64.0	88.8	46.0
2013	68.9	85.6	45.2
2014	57.2	78.5	34.1
2015	60.0	89.4	40.2
2016	61.1	79.8	33.5
2017	52.2	86.4	38.6
2018	65.7	87.1	35.8
2019	73.1	91.4	40.5

Source: BFI

Note: Data updated since publication of the 2019 Statistical Yearbook.

Figure 6 underlines that a small proportion (10%) of titles with a UK spend of £30 million or over were responsible for the majority (76%) of UK production spend in 2019. Conversely, the 27% of films with a UK spend of less than £500,000 represented less than 1% of production investment in the UK.

Figure 6 Percentage of productions and UK spend by category of UK spend, 2019



Source: BFI

DOMESTIC UK PRODUCTIONS BY TERRITORY OF SHOOT

Table 10 shows that the majority of domestic UK productions beginning principal photography in 2019 (76 out of 93) were shot exclusively in the UK, while 17 were shot partly or wholly outside the country. As a proportion of total budget, the non-UK spend of domestic productions in 2019 was 9%, compared with 13% in 2018.

Table 10 Domestic UK productions by territory of shoot, 2019

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	76	159.1	0.7	0.4
UK and other	13	19.8	6.8	34.4
Other only	4	11.9	8.9	75.5
Total domestic UK films	**93**	**190.9**	**16.4**	**8.6**

Source: BFI

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

Table 11 shows the number of shoots by territory for domestic UK films in 2019. 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 20 non-UK shoots in 16 production territories.

Table 11 Domestic UK productions, shoots by territory, 2019

Territory of shoot	Number of shoots
UK	89
Belgium	2
France	2
Peru	2
Portugal	2
Germany	1
India	1
Iraq	1
Republic of Ireland	1
Malta	1
Mauritania	1
Norway	1
Peru	1
South Africa	1
Switzerland	1
USA	1
Venezuela	1
Total shoots	**109**

Source: BFI

In contrast to UK domestic films, co-productions were usually shot partly or wholly abroad (Table 12). Only five out of 23 films, with a total budget of just under £13 million, were shot exclusively in the UK. Non-UK spend accounted for 59.5% of the total budget of co-productions in 2019.

Table 12 Co-productions by territory of shoot, 2019

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	5	12.8	3.7	29.1
UK and other	8	31.9	16.4	51.4
Other only	10	39.7	30.1	76.0
Total domestic UK films	**23**	**84.4**	**50.2**	**59.5**

Source: BFI

The territory distribution of co-production shoots is shown in Table 13. The majority of shoots were in the UK or elsewhere in Europe. The most popular non-European territories were Australia, Canada and South Africa.

Table 13 Co-productions, shoots by territory, 2019

Territory of shoot	Number of shoots
UK	11
Italy	4
Australia	2
Canada	2
South Africa	2
Austria	1
Belgium	1
France	1
Iraq	1
Lithuania	1
Spain	1
Ukraine	1
USA	1
Total shoots	**29**

Source: BFI

PRODUCTION COMPANY ACTIVITY LEVELS

The BFI Research and Statistics Unit recorded 320 production companies associated with films shot in the UK or co-productions involving the UK in 2019, a decrease from 372 in 2018. Of these, 301 companies (94%) 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 14 Film production company activity, 2019

Number of features per company	Number of companies
1	301
2	16
3	1
4	1
6	1
Total	**320**

Source: BFI RSU

Note: Includes all production categories.

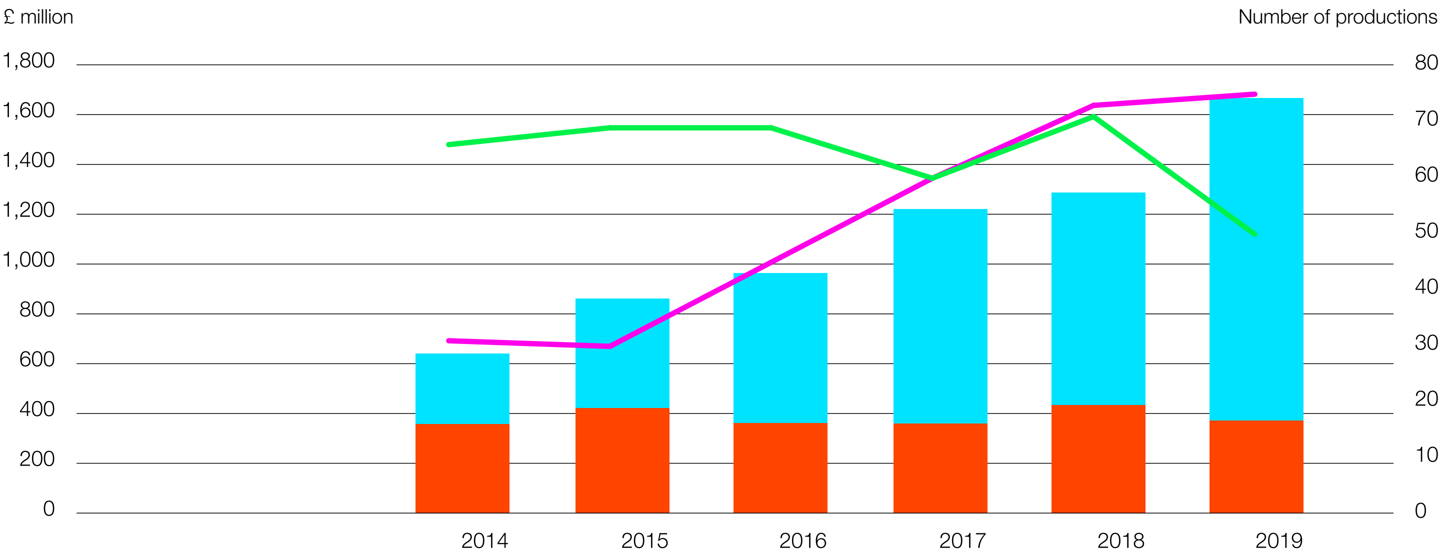
THE VALUE AND VOLUME OF HETV PRODUCTION, 2014-2019

As Figure 7 shows, the UK production value associated with the filming of UK qualifying high-end television (HETV) projects increased each year between 2014 and 2019. UK spend totalled £1.67 billion in 2019, up 29% on 2018, and an increase of 160% compared with 2014. With the exception of 2014, co-production and inward investment projects generated the majority of UK spend across the period. Co-production and inward investment projects contributed £1.29 billion (78%) to the total UK production value in 2019, up from £854 million in 2018, while domestic UK productions contributed £372 million (22%), down from £434 million in 2018.

In 2019, 123 UK qualifying HETV projects were shot in the UK; 49 of these productions were domestic UK projects and 74 were inward investment and co-production projects. While the volume of domestic UK productions in 2019 was the lowest of the period, the volume of inward investment and co-production projects was the highest. (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 co-production and inward investment projects shooting in the UK in 2019 included *The Crown* – Series 4 (10 episodes), *The North Water* – Series 1 (four episodes) and *The Serpent* – Series 1 (eight episodes). HETV domestic UK productions included *Domina* – Series 1 (10 episodes), *A Suitable Boy* (six episodes) and *Traces* – Series 1 (six episodes).

Figure 7 UK spend and number of UK qualifying HETV productions, 2014-2019



	2014	2015	2016	2017	2018	2019
UK spend domestic UK (£ million)	357.8	422.2	360.6	358.6	433.7	371.6
UK spend co-production & inward investment (£ million)	282.2	439.1	603.7	862.2	853.9	1,293.5
Total UK spend	**640.0**	**861.3**	**964.3**	**1,220.8**	**1,287.6**	**1,665.1**
Number of domestic UK productions	65	68	68	59	70	49
Number of co-production & inward investment productions	30	29	44	59	72	74
Total productions	**95**	**97**	**112**	**118**	**142**	**123**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.

Data for co-production and inward investment projects have been combined to avoid disclosing budget data information for individual titles.

In a change from previous editions of the Yearbook, we are only reporting data from the first full calendar year following the introduction of the tax relief for HETV.

Data updated since publication of the 2019 Statistical Yearbook.

SVOD-BACKED HETV PRODUCTION, 2015-2019

Table 15 shows the number of UK qualifying HETV projects produced or co-produced by the two leading stand-alone streaming platforms, Netflix and Amazon between 2015 and 2019, and their associated UK spend.

While the overall numbers of productions backed by Netflix and Amazon have remained relatively small over the period, the UK production value associated with these projects has grown significantly. The UK spend of SVoD-backed HETV productions in 2019 was £549 million, an increase of 93% compared with 2018 (£284 million) and up 570% compared with 2015 (£82 million). As a share of overall UK spend for qualifying HETV programmes, the production value of SVoD-backed projects has more than trebled over the period, increasing from 9.5% in 2015 to 33% in 2019. With the exception of 2017, fully-funded projects generated the majority of UK production spend throughout the period. In 2019, 76% of Netflix and Amazon's UK qualifying productions were fully funded.

SVoD-backed HETV productions beginning principal photography in 2019 included Amazon's *Hanna* – Series 2 (eight episodes), and Netflix's *Cursed* (10 episodes) and *The Irregulars* (nine episodes).

Table 15 Value and volume of SVoD-backed HETV productions, 2015-2019

	2015	2016	2017	2018	2019
UK spend of fully-funded SVoD productions (£ million)	66.3	125.7	124.4	163.3	416.7
UK spend of co-partnered SVoD productions (£ million)	15.7	17.0	243.6	120.8	132.3
Total UK spend of SVoD-backed productions (£ million)	**82.2**	**142.7**	**368.0**	**284.1**	**549.0**
Total UK spend of HETV productions (£ million)	**861.3**	**964.3**	**1,220.8**	**1,287.6**	**1,665.1**
SVoD-backed UK spend as % of total	9.5	14.8	30.1	22.1	33.0
Number of fully-funded SVoD productions	c	c	10	12	19
Number of co-partnered SVoD productions	c	c	16	9	9
Total SVoD-backed productions	**5**	**9**	**26**	**22**	**26**
Total HETV productions	**97**	**112**	**118**	**142**	**123**
SVoD-backed productions as % of total	5.2	8.0	22.0	15.5	21.1

Source: BFI SVoD companies: Netflix and Amazon

Notes:

A fully-funded SVoD production is one financed exclusively by the platform.

A co-partnered SVoD production is a co-production with other broadcasters/investors.

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

See notes to Figure 7.

Data updated since publication of the 2019 Statistical Yearbook.

GENRE OF HETV PRODUCTIONS

Table 16 shows a breakdown of 2019 UK qualifying HETV productions by genre. (It should be borne in mind that, unlike the section on feature film production genres, comparisons here can be between single television programmes and series rather than stand-alone productions.) Drama was the most popular genre for HETV projects accounting for 56 productions (45.5% of the total) and a UK spend of £737 million (44% of the total). Comedy and thriller were the next most popular genres in terms of volume of production, with respective shares of 21% and 6.5%. Comedy also had the second largest share of associated UK spend at 15%, while the fantasy genre was third with 12%.

Table 16 Genre of UK qualifying HETV productions, 2019 (ranked by UK spend)

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	56	45.5	959.0	43.5	737.4	44.3
Comedy	26	21.1	277.6	12.6	254.2	15.3
Fantasy	6	4.9	336.3	15.3	207.0	12.4
Sci-fi	5	4.1	159.4	7.2	117.0	7.0
Action	5	4.1	132.5	6.0	87.5	5.3
Thriller	8	6.5	85.2	3.9	80.8	4.9
Crime	7	5.7	53.3	2.4	53.3	3.2
Documentary	5	4.1	60.6	2.8	40.1	2.4
Other*	5	4.1	139.7	6.3	87.9	5.3
Total	**123**	**100.0**	**2,203.7**	**100.0**	**1,665.1**	**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 musical, horror, adventure and mystery. Data are combined to avoid disclosing budget details of individual projects.

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

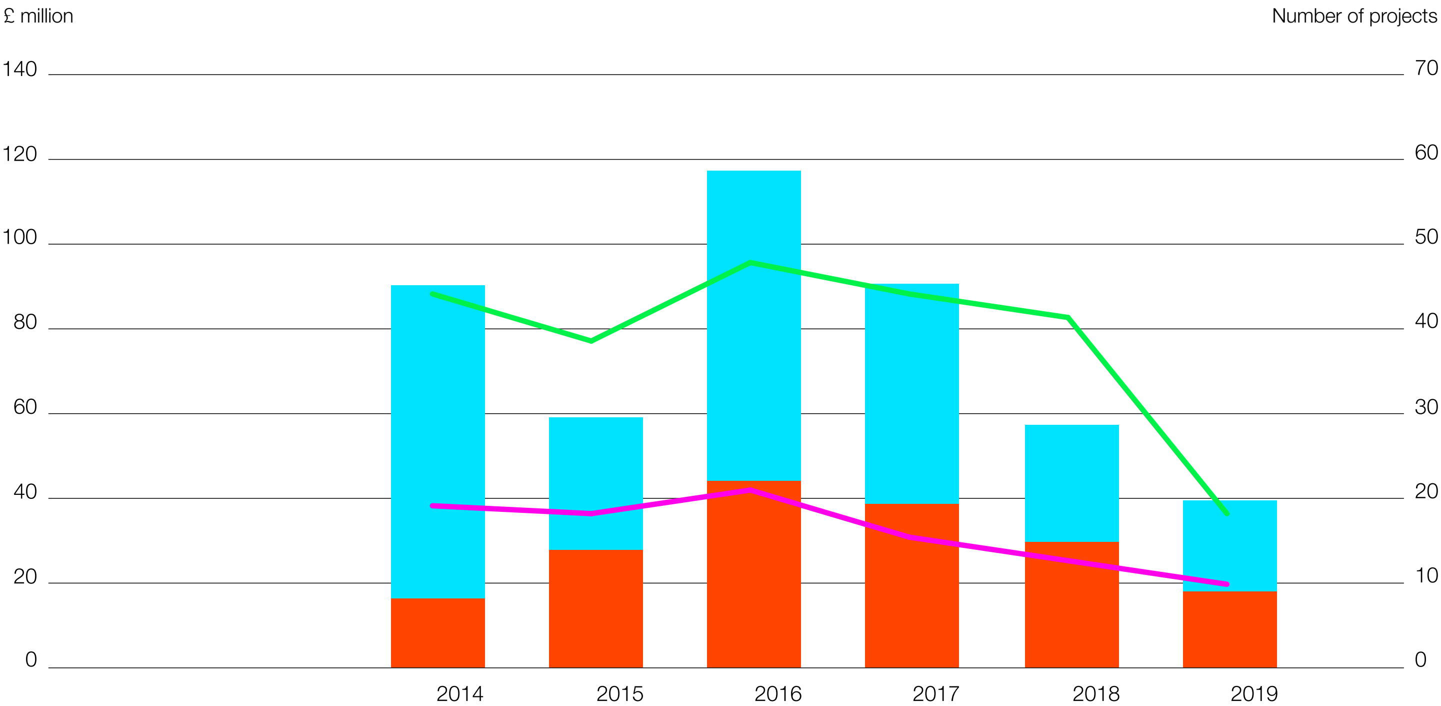
THE VALUE AND VOLUME OF ANIMATED TELEVISION PRODUCTION, 2014-2019

Figure 8 shows the number of UK qualifying animation television programmes produced between 2014 and 2019 and their associated UK spend.

In 2019, the total UK production spend for qualifying animation programmes was £39.5 million, down 31% compared with 2018 (£57 million) and a 66% decline on the period high (£117 million) achieved in 2016. Domestic projects accounted for the majority of UK production value for qualifying animations each year throughout the period, with the exception of 2018, when the share of overall UK spend was 48%. In 2019, 54% of UK spend was attributed to domestic UK productions.

A total of 23 UK qualifying animation projects began production in 2019, down from 51 in 2018, and the lowest figure of the period. There were 16 domestic UK projects and seven co-production and inward investment projects. (It should be noted, however, 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 *It's About Time* (44 episodes), *Love Monster* (54 episodes) and *StreetCat Bob* – Series 2 (15 episodes), while co-production and inward investment titles included *Alva and the Trolls* (52 episodes), *Pablo* – Series 2 (52 episodes) and *Pony* (40 episodes).

Figure 8 UK spend and number of UK qualifying animated television productions, 2014-2019



	2014	2015	2016	2017	2018	2019
UK spend domestic UK (£ million)	74.0	31.3	73.2	52.0	27.7	21.5
UK spend co-production & inward investment (£ million)	16.3	27.8	44.1	38.6	29.6	18.0
Total UK spend (£ million)	**90.3**	**59.1**	**117.3**	**90.6**	**57.3**	**39.5**
Number of UK domestic UK projects	44	38	48	44	41	16
Number of co-production & inward investment projects	17	16	19	13	10	7
Total number of projects	**61**	**54**	**67**	**57**	**51**	**23**

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.

In a change from previous editions of the Yearbook, we are only reporting data from the first full calendar year following the introduction of the tax relief for animated television.

Data updated since publication of the 2019 Statistical Yearbook.

THE VALUE AND VOLUME OF CHILDREN'S TELEVISION PRODUCTION, 2016-2019

Table 17 shows the UK spend associated with the production of UK qualifying children's television programmes between 2016 and 2019.

In 2019, the total UK production spend of qualifying children's television projects was £72 million, down from £113 million in 2018. (It should be borne in mind, however, that the most recent figures are likely to be revised upwards as further production data become available.) Domestic UK productions accounted for the majority of UK spend across the period.

Table 17 UK spend of UK qualifying children's television productions, 2016-2019 (£ million)

	2016	2017	2018	2019
Domestic UK	44.3	51.3	96.5	64.3
Co-production and inward investment	24.4	23.4	16.1	8.1
Total	**68.7**	**74.7**	**112.6**	**72.4**

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.

In a change from previous editions of the Yearbook, we are only reporting data from the first full calendar year following the introduction of the tax relief for children's television.

Data updated since publication of the 2019 Statistical Yearbook.

As Table 18 shows, a total of 51 UK qualifying children's television projects went into production in 2019, down from 85 projects in 2018. (The volume of productions reported for the most recent years is likely to be revised upwards.) Titles going into production in 2019 included *The Demon Headmaster* (10 episodes), *Mimi's World* (52 episodes) and *Scrambled* – Series 7 (44 episodes).

Table 18 Number of UK qualifying children's television productions, 2016-2019

	2016	2017	2018	2019
Domestic UK	67	72	80	c
Co-production and inward investment	11	6	5	c
Total	**78**	**78**	**85**	**51**

Source: BFI

See notes to Table 17.

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

Data updated since publication of the 2019 Statistical Yearbook.

THE VALUE AND VOLUME OF VIDEO GAMES DEVELOPMENT, 2015-2019

Table 19 shows the number of UK qualifying video games projects in development between 2015 and 2019 and their associated UK spend.

Our current reporting indicates that, in 2019, 24 games projects were in development with a UK production value of £34 million. It should be noted, however, that as further data become available these figures are likely to increase substantially (see note below). In a change to previous years, data for video games projects are no longer disaggregated as it is not possible to accurately ascertain whether, when a project has international involvement, that project has been substantially financed and controlled from outside the UK.

UK qualifying video games which began development in 2019 included *Peaky Blinders: The King's Ransom, Project Lasergun* and *Two Point Campus*.

Table 19 UK spend and number of UK qualifying video games, 2015-2019

	2015	2016	2017	2018	2019
UK spend (£ million)	269.9	638.7	350.4	271.7	33.8
Number of projects	280	373	276	155	24

Source: BFI

Notes:

Projects are allocated to the year development commenced.

Data updated since publication of the 2019 Statistical Yearbook.

Due to the delay in acquiring full data on video games development, the figures for the most recent years are expected to be revised upwards. In 2019, for example, we reported the volume and value of 2018 UK qualifying video games development as 26 projects with an associated UK spend of £46 million.

In a change from previous editions of the Yearbook, we are only reporting data from the first full calendar year following the introduction of the tax relief for video games.

There are no co-production treaties for video games.

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