SCREEN SECTOR PRODUCTION

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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.

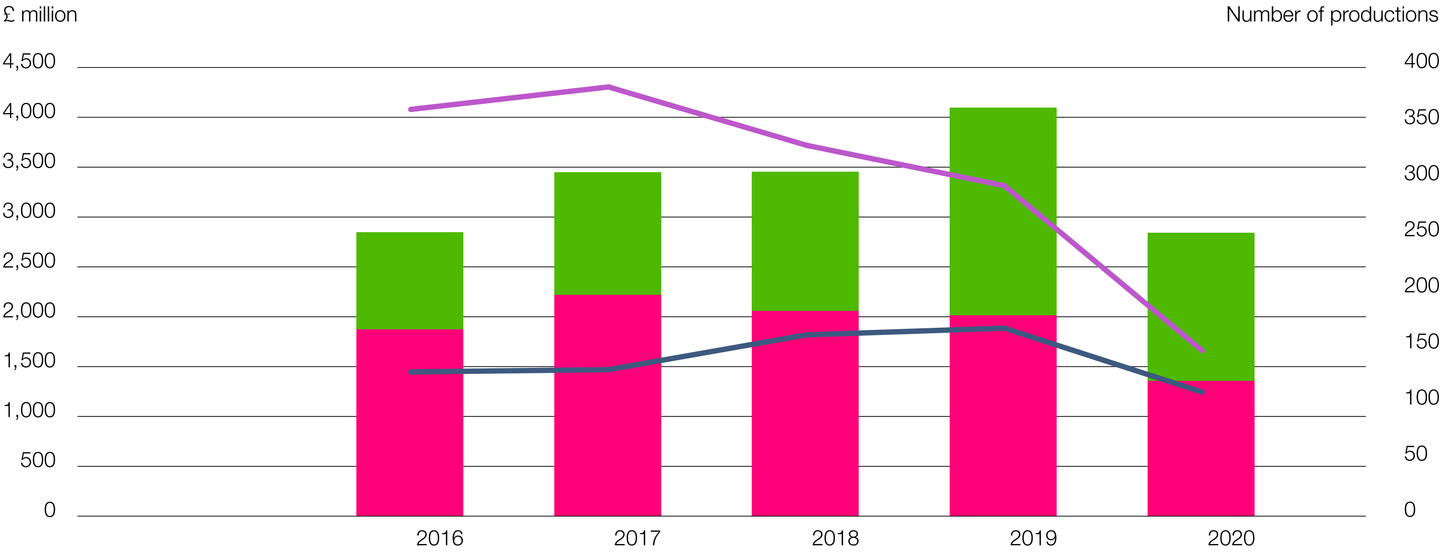
Official production statistics for Q3, published in November, revealed a robust production bounce-back with the combined UK spend generated by film and HETV productions for the period exceeding that recorded in Q1 2020. This recovery was sustained and amplified across Q4, which recorded the second highest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

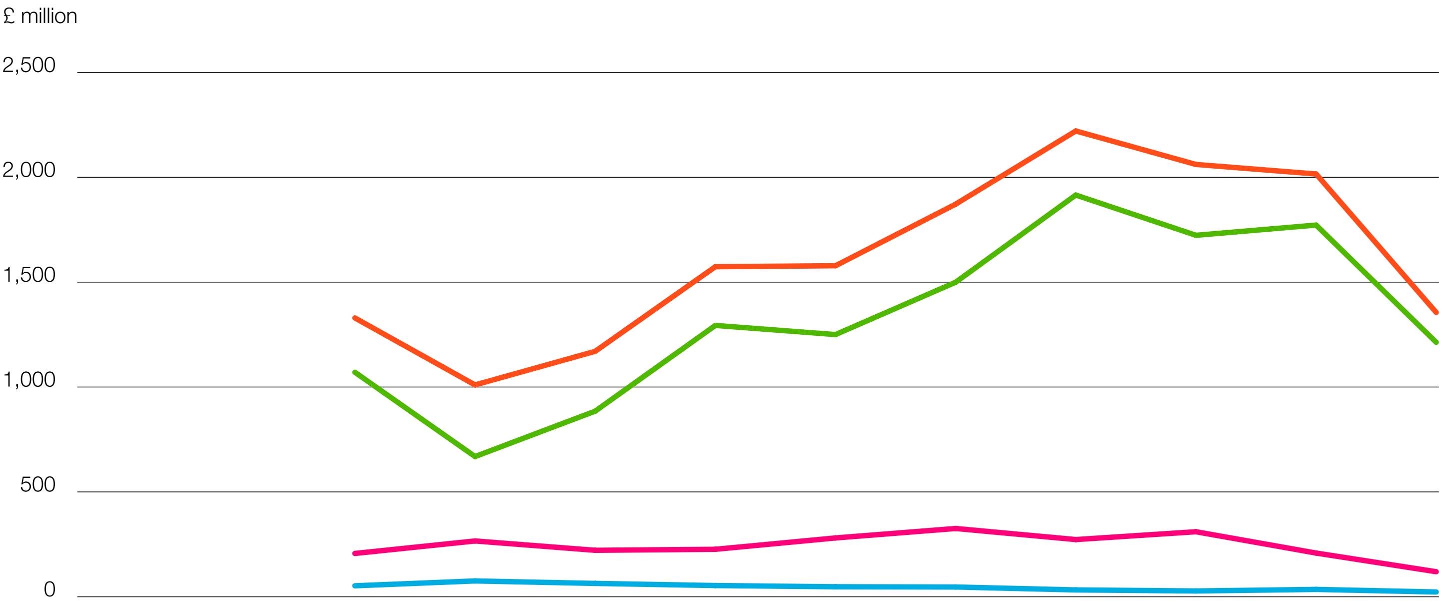
Figure 2 shows the aggregate UK spend of feature films that started principal photography in 2020 was £1.36 billion, down 33% compared with 2019 (£2.02 billion). This was the first year to record an overall UK spend below £1.5 billion since 2013, when the total was £1.17 billion. This was to a large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

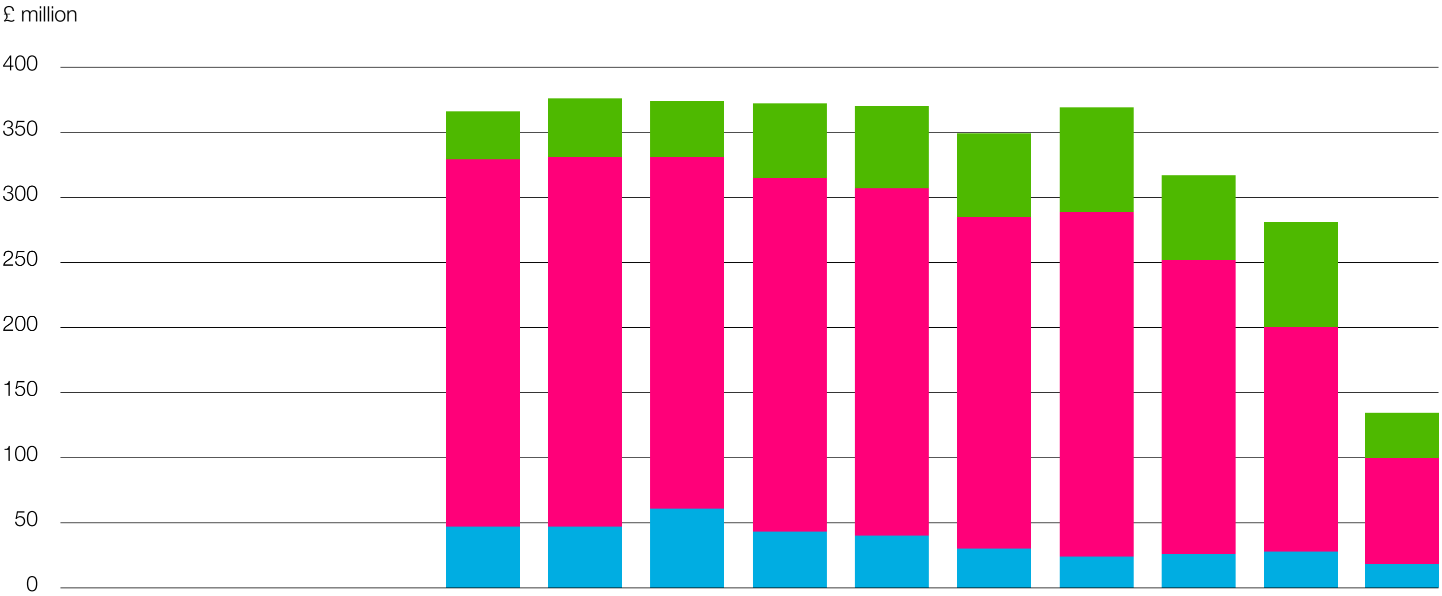
Source: BFI
Notes:
The categories in this table differ to previous years when data for 'UK independent films' and 'non-UK films' were included separately.
* 'Studio-backed' means a UK film wholly or partly financed and controlled by a US studio but featuring UK cast, crew, locations, facilities, post-production 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

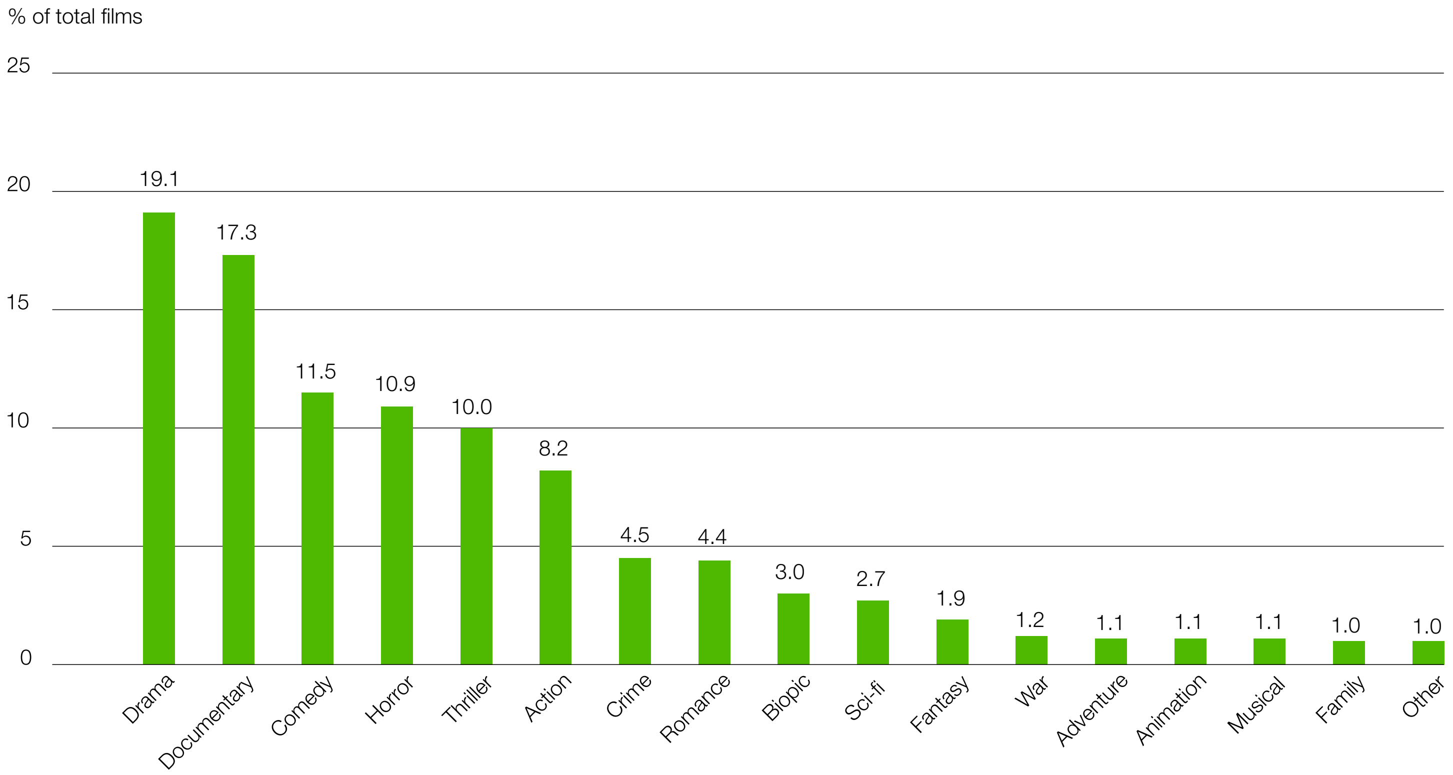


Table 6 shows the top 10 genres by share of UK spend for domestic UK films and inward investment/co-production titles (inward investment and co-production films have been combined for data disclosure reasons). The table shows a more even distribution of genres for domestic UK films compared with inward 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.

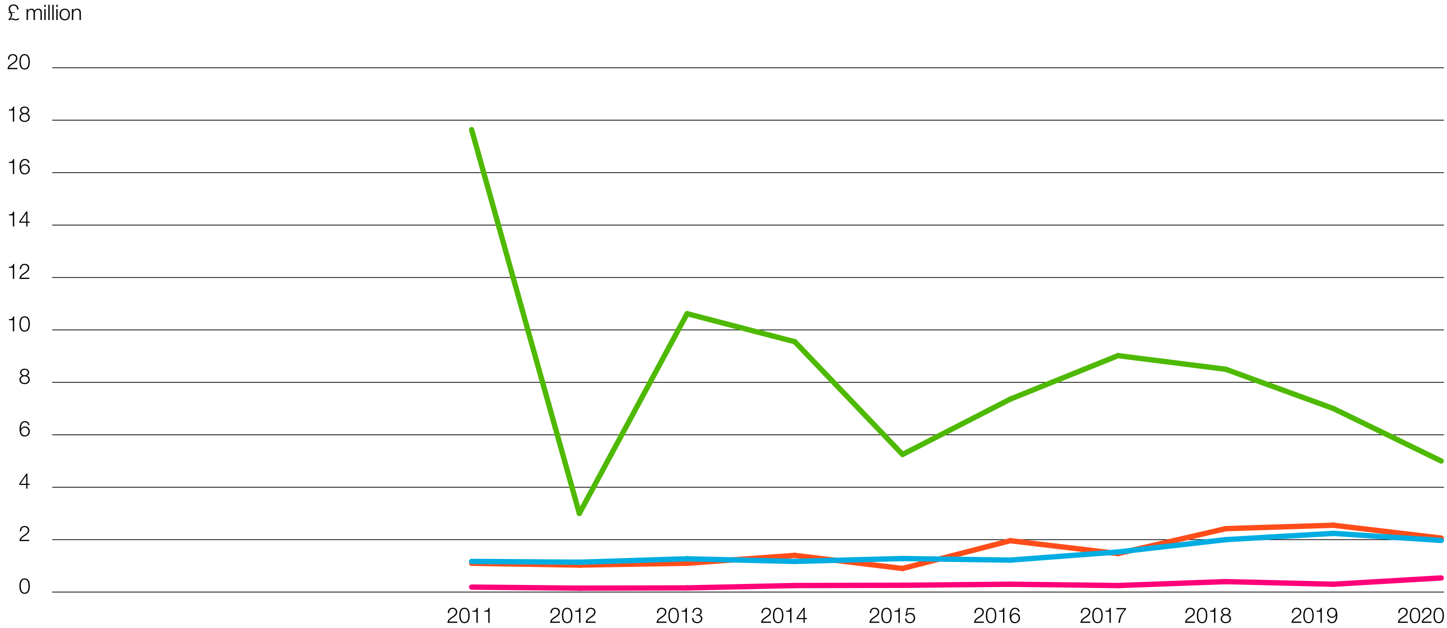
Budget trends, 2011-2020

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.

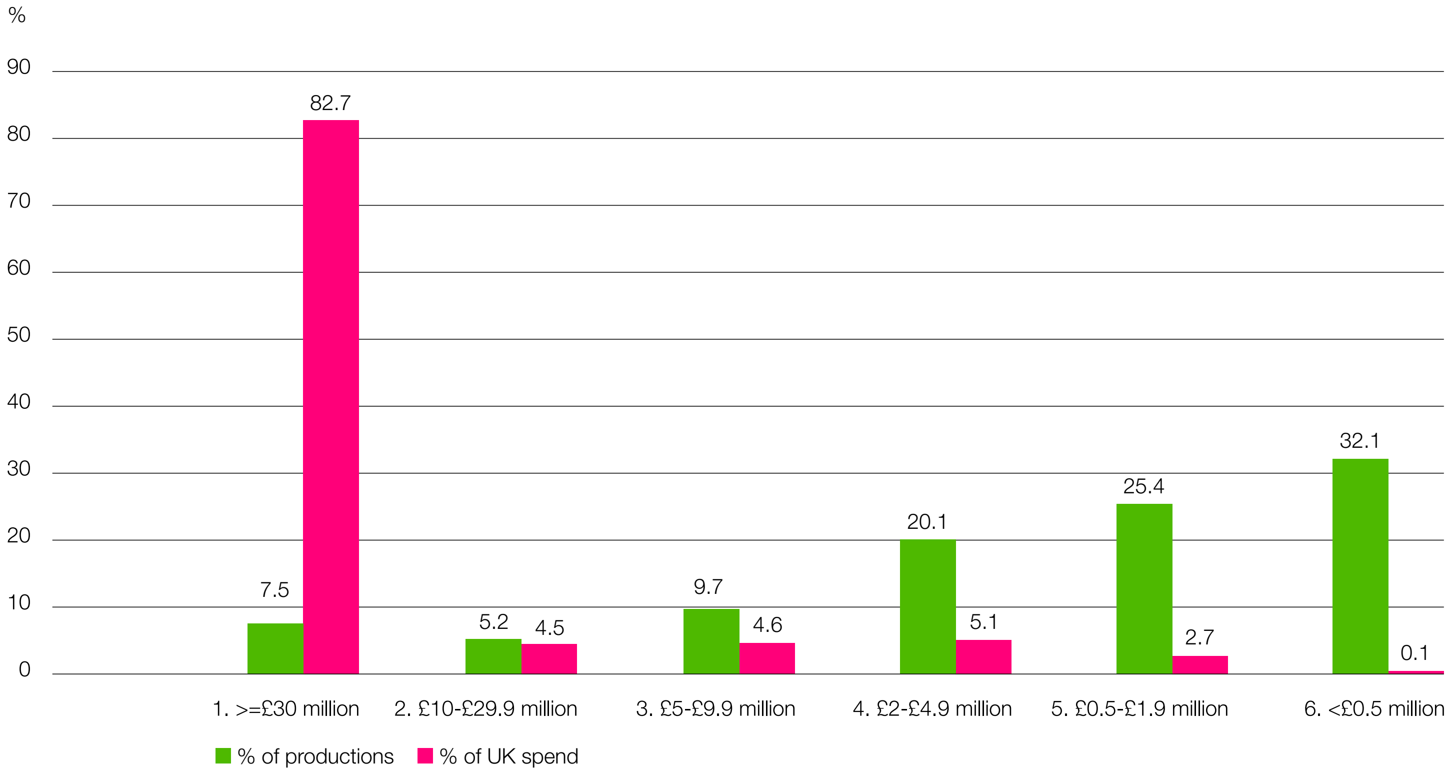
Table 11 UK spend as percentage of total production budget, 2011-2020

	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

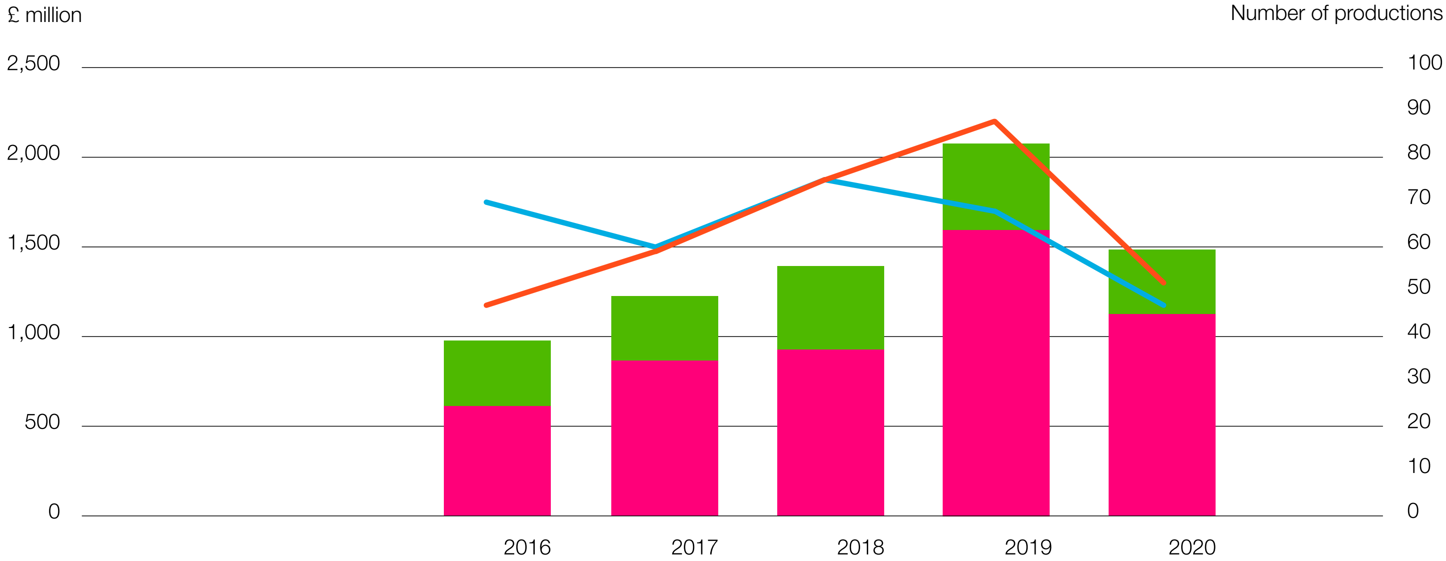
The value and volume of HETV production, 2016-2020

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**

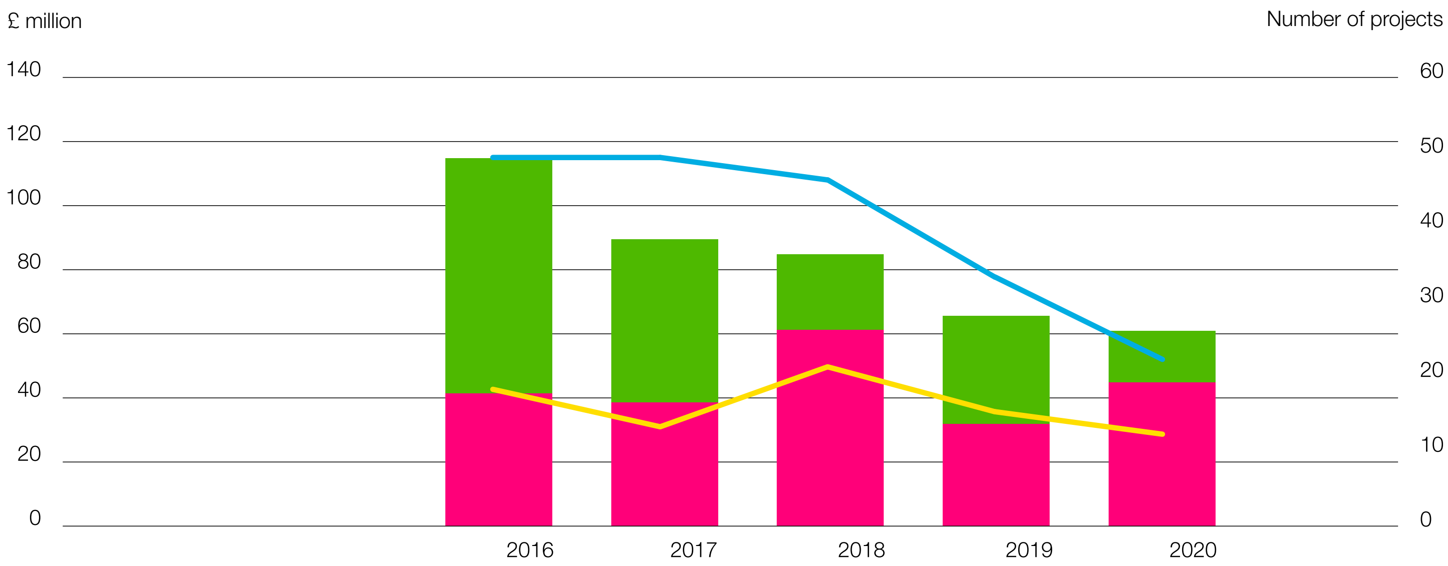
Source: BFI
Notes:
A production can be a single programme or a television series.
The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.
* Other includes fantasy, action, biopic, war, documentary and musicals. Data are combined to avoid disclosing budget details 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.

Research & Statistics Unit
21 Stephen Street, London W1T 1LN
bfi.org.uk/statistics