STATISTICAL YEARBOOK 2020

Welcome to the 2020 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 2019. 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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CONTENTS

THE BOX OFFICE 2019

FACTS IN FOCUS

In 2019, UK box office revenues exceeded £1.2 billion for the fifth year in succession, while cinema admissions at 176.1 million, although lower than in 2018, where the second highest since 1970.

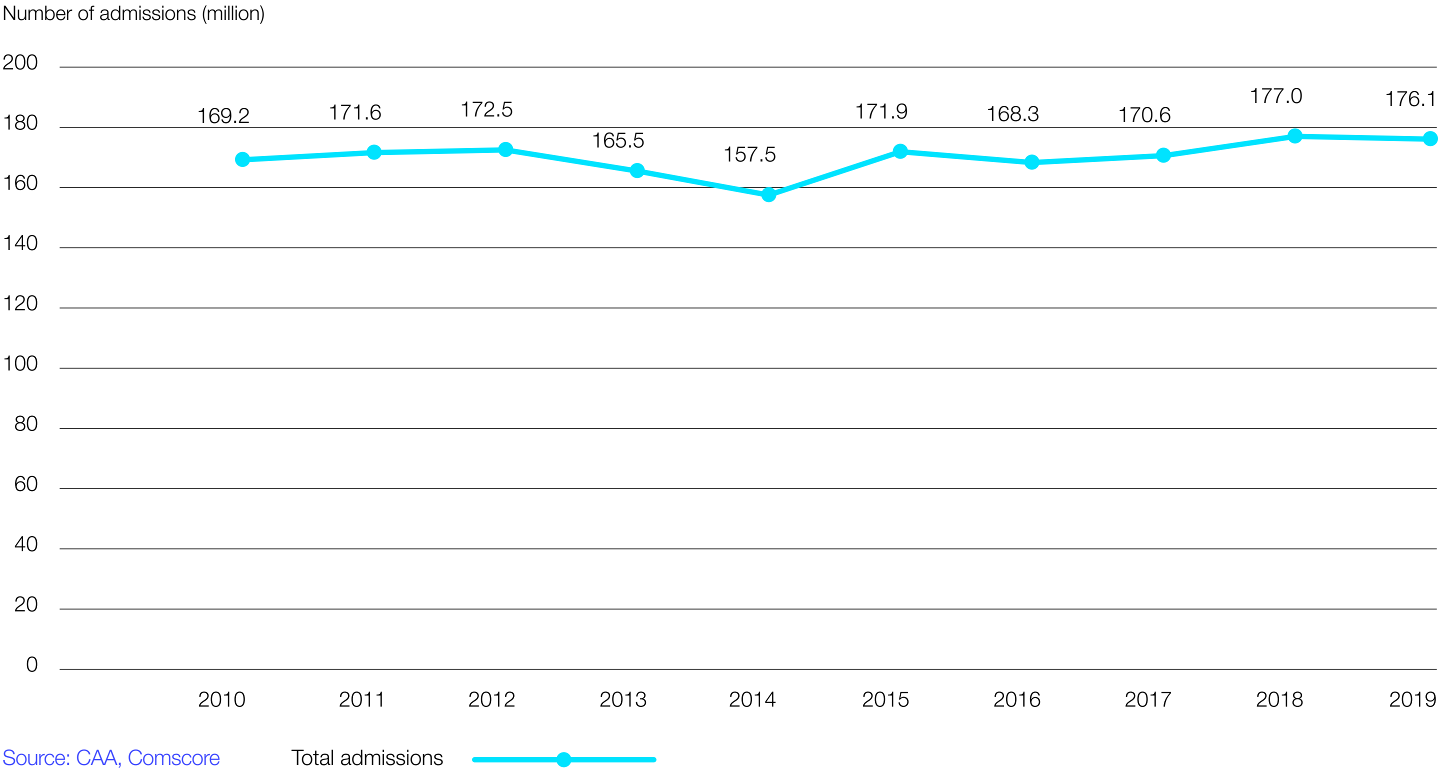
- UK cinema admissions reached 176.1 million in 2019, down 0.5% from 177 million in 2018.
- UK box office receipts in 2019 were £1.25 billion, down 2% on 2018.
- A total of 764 films were released for a week or more in the UK and Republic of Ireland.
- UK films, including co-productions, accounted for 25% of releases and 48% of the market by value.
- The box office share of UK independent films was 12.9%, down from 13.2% in 2018.
- The top 100 films earned 94% of the gross box office, the highest share of the past decade.
- Just under 10% of all films released in 2019 (72) were shown at 500 sites or over, while 30% of films (227) were shown at fewer than 10 sites.

THE BOX OFFICE 2019

ADMISSIONS

Just over 176 million cinema tickets were sold in the UK in 2019, a slight drop from the 177 million sold in 2018, but still the second highest attendance figure since 1970. These figures cap a strong decade of cinema-going in the UK with six of the 10 years between 2010 and 2019 recording annual admissions in excess of 170 million (Figure 1).

Figure 1 Annual UK cinema admissions, 2010-2019



Source: CAA, Comscore

Attendances were up in four of the five major European Union (EU) territories in 2019, with only the UK witnessing a small decline (-0.5%). Italy (+14.2%) recorded the largest increase, followed by Germany (+12.6%), France (+6.0%) and Spain (+4.8%). According to European Audiovisual Observatory estimates, total admissions in the EU increased by 5.5% in 2019 to just over 1 billion, the highest recorded figure for attendances since 2004. With the inclusion of non-EU territories, admissions in Europe also saw an overall increase, rising from 1.25 billion in 2018 to 1.31 billion. Europe's largest cinema market in terms of admissions, Russia, recorded a rise of 9.5% while Turkey saw a substantial decline in admissions (-15.6%).

Increased attendances were also seen in the majority of other major cinema markets in 2019, including the world's two largest territories in terms of admissions, China (+0.6%) and India (+8.8%). There was, however, a decline in the North American market which saw admissions fall by 4.1% compared with 2018.

Table 1 Admissions in selected global territories, 2018 and 2019 (ranked by 2019 admissions)

Territory	Admissions 2018 (million)	Admissions 2019 (million)	+/- 2018 (%)
China	1,717	1,727	0.6
India	1,463	1,592	8.8
USA and Canada	1,310	1,256	-4.1
Mexico	332	350	5.5
South Korea	216	227	4.8
Russia	200	219	9.5
France	201	213	6.0
Japan	169	195	15.2
UK	177	176	-0.5
Brazil	163	172	5.6
Indonesia	135	146	7.8
Germany	105	119	12.6
Italy	92	105	14.2
Spain	99	105	4.8
Poland	60	61	1.5
Turkey	70	59	-15.6

Source: CAA, BFI, European Audiovisual Observatory, Omdia

Notes:

Includes all global territories with more than 100 million admissions and all European territories with more than 50 million admissions.
Admissions figures for India in both 2018 and 2019 have been calculated on the basis of a different methodology than the one used for earlier editions of the Yearbook, so are not directly comparable.

Table 2 shows the breakdown of UK admissions for 2019 by month. Seven months (April, May, June, July, September, October and December) recorded higher admissions than their equivalent in 2018. June saw the year's largest increase in attendances (up 34% on 2018), while July saw the highest admissions for the entire year at 18.7 million. The top earning titles released, or earning the bulk of their total gross, in these two months included six of the year's top 20 box office earners: *Aladdin, Toy Story 4, Rocketman, The Secret Life of Pets 2, Spider-Man: Far from Home* and *The Lion King*.

Table 2 Monthly UK cinema admissions, 2018 and 2019

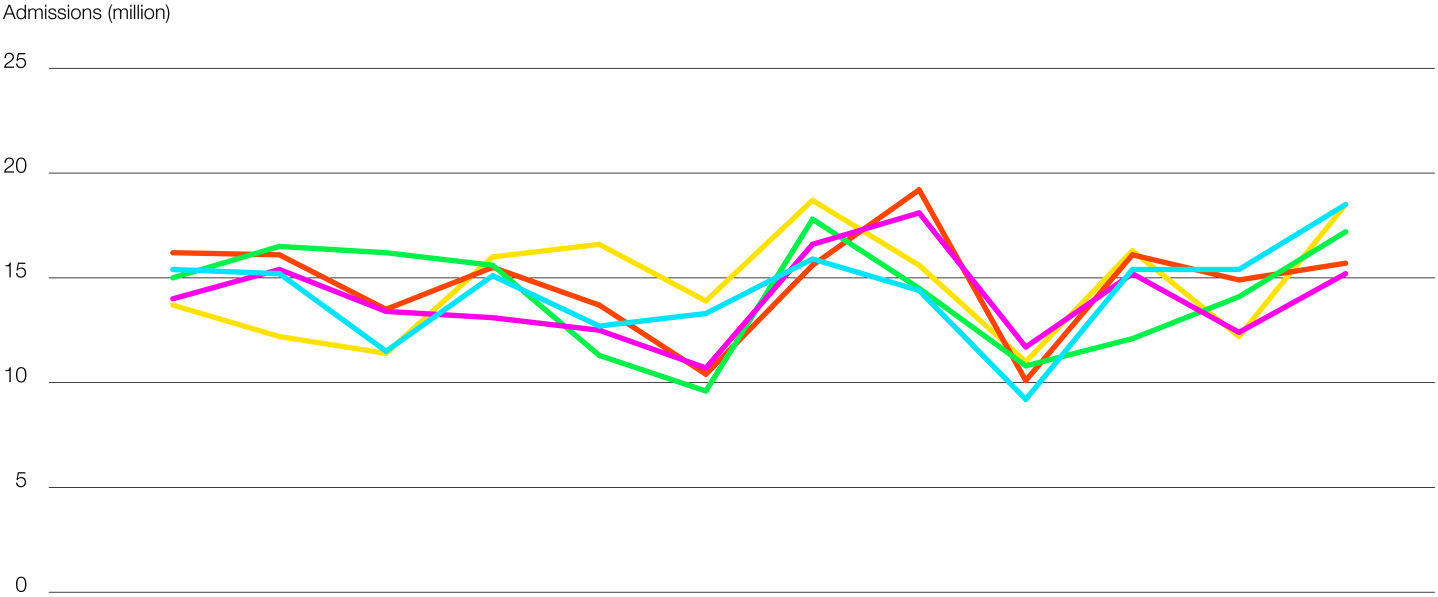
Month	2018 (million)	2019 (million)	% +/- on 2018
January	16.2	13.7	-15.4
February	16.1	12.2	-24.0
March	13.5	11.4	-15.5
April	15.5	16.0	3.1
May	13.7	16.6	20.8
June	10.4	13.9	33.7
July	15.6	18.7	19.5
August	19.2	15.6	-19.1
September	10.1	11.0	8.2
October	16.1	16.3	1.8
November	14.9	12.2	-17.8
December	15.7	18.5	18.1
Total	**177.0**	**176.1**	**-0.5**

Source: CAA, Comscore

Note: Figures for 2018 updated since publication of the 2019 Statistical Yearbook.

Looking at monthly admissions since 2015, Figure 2 shows there is a broadly similar pattern year on year, with attendances peaking during the school and festival holiday periods when people have more time to go to the cinema.

Figure 2 Monthly UK cinema admissions, 2015-2019



	January	February	March	April	May	June	July	August	September	October	November	December	**Total**
2015	15.4	15.2	11.5	15.1	12.7	13.3	15.9	14.4	9.2	15.4	15.4	18.5	**171.9**
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	**168.3**
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	**170.6**
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	**177.0**
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	**176.1**

Source: CAA
See note to Table 2.

Table 3 shows how the 2019 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). The UK's most populous region, London, accounted for the highest share of admissions (22.9%) followed by the Midlands and South and South East (with 12.0% and 11.9% respectively). Together these three regions accounted for almost half (47%) of all cinema admissions in 2019. In terms of average admissions per head of population, cinema-going is highest in London and Central Scotland and lowest in the West and Border regions.

Overall, the pattern of national and regional admissions has remained largely unchanged over the last decade. It is worth noting, however, that while London accounts for the highest number of attendances each year its share of the total has fallen in recent years; it was 25.5% in 2013.

Table 3 Cinema admissions by ISBA TV region, 2019

Region	Admissions (million)	%	Population (million)*	Admissions per person
London	40.2	22.9	13.4	3.0
Midlands	21.0	12.0	8.8	2.4
South and South East	21.0	11.9	7.5	2.8
North West	18.1	10.3	7.1	2.5
Yorkshire	15.4	8.8	6.4	2.4
East of England	14.1	8.0	4.9	2.9
Central Scotland	11.3	6.4	3.8	3.0
Wales	7.6	4.3	3.1	2.4
North East	7.0	4.0	2.7	2.6
West	5.8	3.3	3.1	1.9
Northern Ireland	5.6	3.2	1.9	2.9
South West	4.4	2.5	1.8	2.5
Northern Scotland	3.3	1.9	1.3	2.5
Border	1.1	0.6	0.6	1.9
Total	**176.1**	**100.0**	**66.4**	**2.7**

Source: CAA, Comscore

Notes:

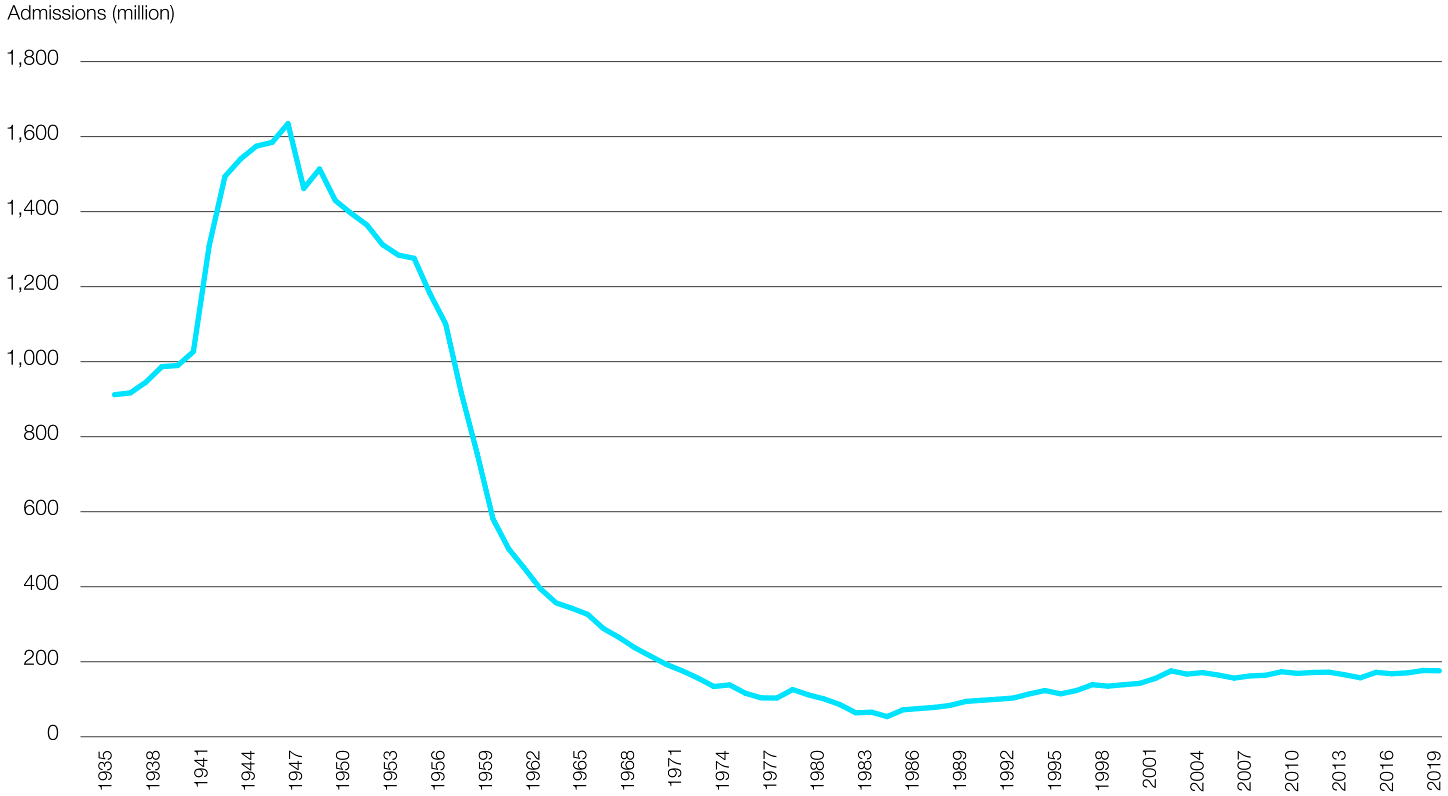
Figures/percentages may not sum to totals due to rounding.

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).

* BARB/Ipsos Connect Establishment Survey data for all individuals, Annual Data Report, ITV Areas.

Figure 3 puts UK admissions in a longer term perspective. Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as incomes rose and 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 supply 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 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.

Figure 3 Annual UK admissions, 1935-2019



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

Year	Admissions (million)
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

Year	Admissions (million)
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

Year	Admissions (million)
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

Source: BFI, CAA, Comscore

UK BOX OFFICE EARNINGS

According to Comscore, the total UK box office gross for 2019 was £1.25 billion, a slight decrease on the record high achieved in 2018. This total covers all box office earnings during calendar year 2019 for cinema screenings in the UK tracked by Comscore. The trends in box office takings from 2010 are shown in Table 4 and indicate growth of 27% in the period.

The decline in box office between 2018 and 2019 (-2.2%) was larger than the year-on-year decrease in admissions (-0.5%) shown in Table 1. This is partly due to a fall in the average ticket price, the second recorded annual decrease since our analysis began in 2002. (Trends in ticket prices are reported more fully in the Exhibition chapter.)

Table 4 UK box office trends, 2010-2019

Year	Box office gross (£ million)	Change on previous year %	Change since 2010 %
2010	988	-	-
2011	1,040	5.3	5.3
2012	1,099	5.7	11.2
2013	1,083	-1.5	9.6
2014	1,063	-1.8	7.6
2015	1,242	16.8	25.7
2016	1,228	-1.1	24.3
2017	1,279	4.2	29.5
2018	1,282	0.2	29.8
2019	1,254	-2.2	26.9

Source: Comscore

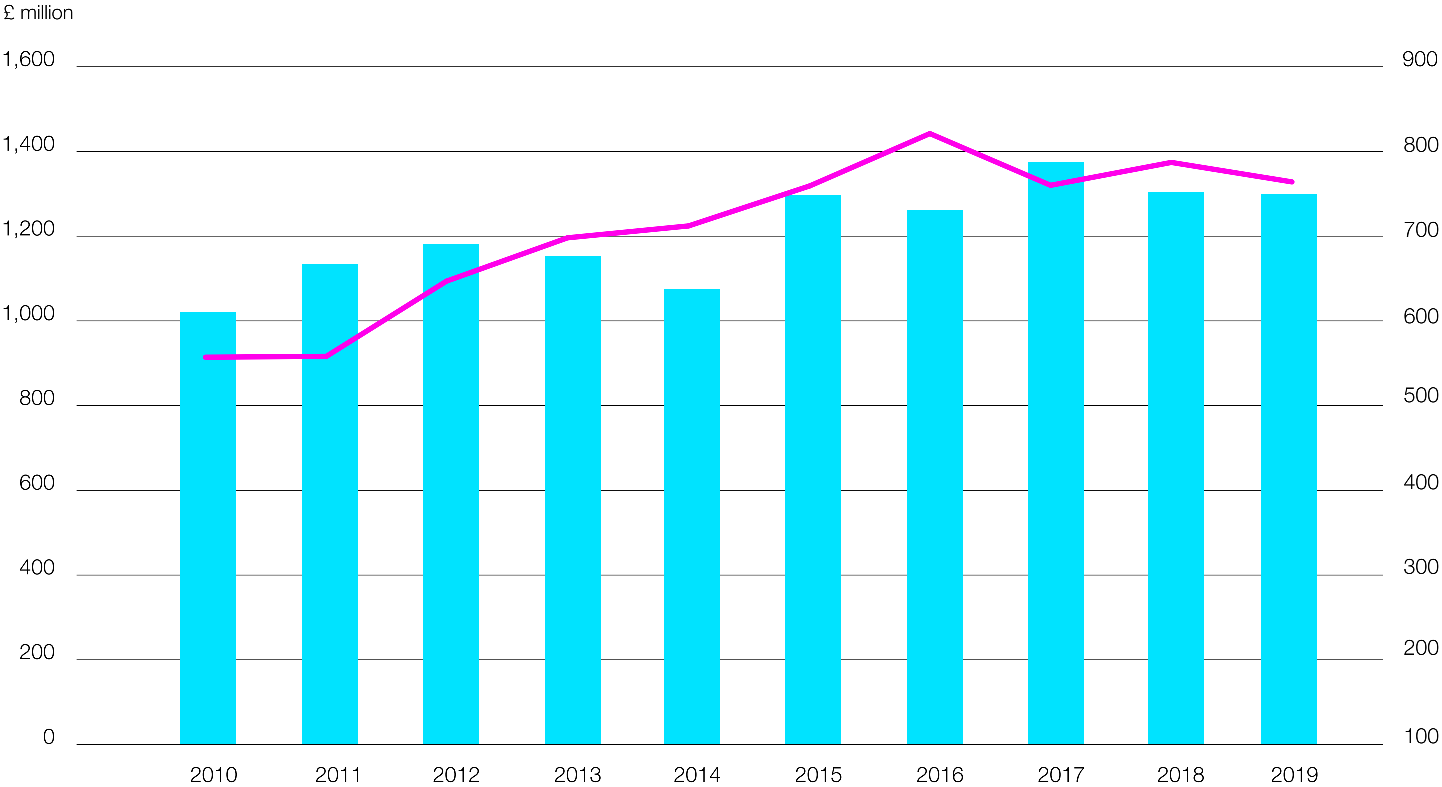
Image: *Rocketman* © 2018 Paramount Pictures. All rights reserved.

FILM RELEASES AND BOX OFFICE REVENUES IN THE UK AND REPUBLIC OF IRELAND

In 2019, 764 films (an average of just under 15 per week) were released for a week or more in the UK and Republic of Ireland, 23 fewer than in 2018. These films generated £1.3 billion in box office revenues, the same as in 2018. This figure differs from the £1.25 billion in the previous section because it includes revenues generated in 2020 by films released in 2019 and covers the Republic of Ireland as well as the UK, which distributors usually treat as a single distribution territory. The subsequent analysis in this chapter includes all titles released in 2019 and includes revenues generated up to 20 February 2020.

Figure 4 shows the number of releases and box office revenues between 2010 and 2019. Although there is an upward trend in both the number of films exhibited and theatrical earnings over the period, there is little correlation between the two.

Figure 4 Revenues and releases at the UK and Republic of Ireland box office, 2010-2019



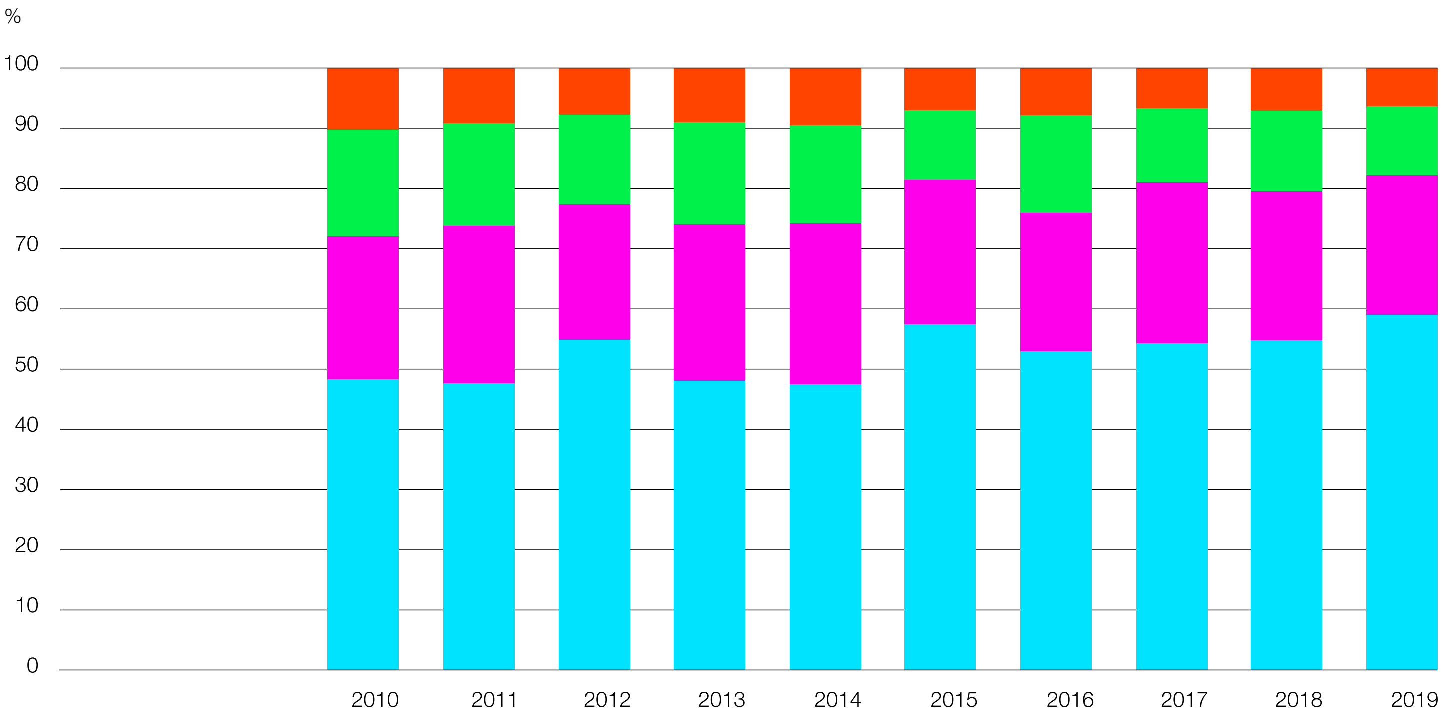
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Gross box office (£ million)	1,023.6	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9	1,304.8	1,300.9
Number of releases	557	558	647	698	712	759	821	760	787	764
Average revenue per release (£ million)	1.8	2.0	1.8	1.7	1.5	1.7	1.5	1.8	1.7	1.7

Source: Comscore, BFI RSU analysis

Note: Box office up to and including 20 February 2020.

The market share of the top 50 highest grossing films has been on an upward trend since 2010, rising from 72% to 82% in 2019 (Figure 5). The concentration of box office share in the top 20 films in 2019 was 59%, the highest of the 10-year period. Six films released in 2019 earned over £50 million at the box office with the top earning title *Avengers: Endgame* accounting for nearly 7% of total theatrical revenue for the year. This is more than the combined share of all films outside the top 100.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2010-2019



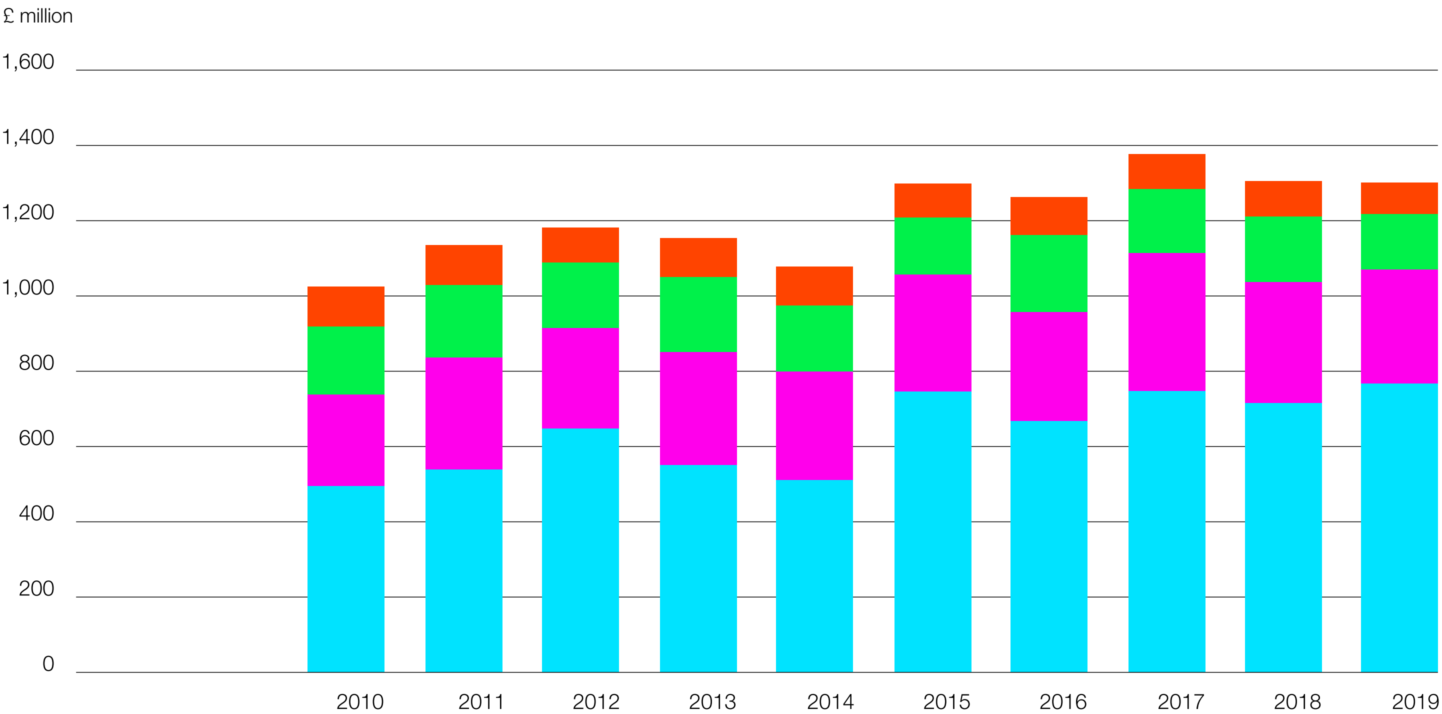
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
% share of rest	10.3	9.3	7.9	9.0	9.6	7.0	7.9	6.7	7.1	6.4
% share of 51-100	17.7	17.0	14.8	17.0	16.3	11.6	16.2	12.3	13.4	11.4
% share of 21-50	23.7	26.2	22.5	26.0	26.7	24.0	23.0	26.7	24.7	23.2
% share of top 20	48.2	47.5	54.8	48.0	47.4	57.4	52.9	54.3	54.8	59.0

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 2019 was 27% higher than in 2010. The takings of the top 20 film releases in 2019, an all-time record at £767 million, were up 7% compared with 2018, and an increase of 55% on 2010. The films ranked 21-50 earned £302 million, down 6% compared with 2018 but up 24% on 2010, while those ranked 51-100 earned £148.5 million, a 15% decrease compared with 2018 and the lowest gross of the decade.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Box office of rest (£ million)	106.1	105.6	92.9	104.0	103.5	90.9	100.2	92.2	93.1	82.9
Box office of 51-100 (£ million)	181.7	192.8	174.9	199.3	175.5	150.3	204.5	170.0	175.1	148.5
Box office of 21-50 (£ million)	242.9	296.8	266.5	299.3	288.1	311.6	289.6	367.2	321.7	302.3
Box office of top 20 (£ million)	494.6	539.3	647.9	551.1	510.7	745.6	667.7	747.1	714.9	767.2

Source: Comscore, BFI RSU analysis

Table 5 shows that since 2010, while there has been an overall increase in the total number of films being released, there has been a downward trend in the gross box office earnings for films outside the top 100. The £83 million generated by all films outside the top 100 in 2019 was shared by 664 titles (a median box office of £26,767) while the £106 million taken by films outside the top 100 in 2010 was split across 457 titles (a median box office of £35,905). This highlights the increasing difficulties faced by independent distributors in competing for market share but also shows their success in achieving theatrical releases for more independent films than in recent years.

Table 5 Releases and revenues of films outside the top 100, 2010-2019

	Number of films	Gross box office (£ million)	Median box office (£)
2010	457	106.1	35,905
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

Source: Comscore, BFI RSU analysis

WIDEST POINT OF RELEASE

Table 6 shows the number of releases and median box office gross by the number of sites at the widest point of release (WPR). A total of 204 releases were shown at 100 sites or over (27% of all films released), while 227 films were shown at fewer than 10 sites (30%). Just under 10% of all films released in 2019 (72) were shown at 500 sites or over, a five-fold increase from the start of the decade in 2010, when only 2% of films (13) received such wide releases.

Table 6 Number of releases and median box office gross by widest point of release, 2019

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥600	38	5.0	18,829,774	3,301,195	88,692,771
500-599	34	4.5	4,744,210	757,494	10,979,867
400-499	32	4.2	1,963,972	87,614	7,615,618
300-399	26	3.4	511,495	92,891	4,497,955
200-299	16	2.1	475,224	29,978	2,197,562
100-199	58	7.6	174,277	8,406	1,528,261
50-99	77	10.1	104,824	4,548	994,174
10-49	256	33.5	32,534	583	418,506
<10	227	29.7	5,042	40	207,112
Total	**764**	**100.0**	**38,327**	**40**	**88,692,771**

Source: Comscore, BFI RSU analysis

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

COUNTRY OF ORIGIN OF FILM RELEASES

Twenty-five per cent of all films released in the UK and Republic of Ireland in 2019 were of USA origin (excluding UK co-productions) and these films accounted for 50% of total box office earnings (Table 7). UK films, including co-productions, also represented 25% of releases (the same as in 2018) and earned 48% of the box office; UK independent films represented the majority of this share (22%, down marginally from 23% in 2018) and 13% of the box office (the same as in 2018).

Films originating outside the UK and USA accounted for 50% of releases in 2019 (up from 48% in 2018) but just 3% of earnings (the same as in 2018). Films from non-UK European countries accounted for 1.1% of the box office (from 18% of releases), the same as in 2018. It is worth noting, however, that one quarter of the box office for these films was generated by two English language European animations (*The Queen's Corgis* and *Playmobil: The Movie*). If we compare the box office of non-English language European releases with those of the previous year, we see an 18% drop (£9.8 million in 2019; £12.0 million in 2018). Films from India accounted for 1.2% of the total box office in 2019 (from 23% of releases), the same as in 2018. The share for films from the remaining world territories accounted for 0.5% of the overall box office (from 9% of releases) a slight increase from 0.3% of the box office in 2018.

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2019

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	191	25.0	651.0	50.0
UK (studio-backed*)	23	3.0	450.8	34.7
UK (independent)	168	22.0	168.0	12.9
All UK	191	25.0	618.8	47.6
Other Europe	140	18.3	14.4	1.1
India	175	22.9	15.5	1.2
Rest of the world	67	8.8	6.2	0.5
Total	**764**	**100.0**	**1,300.9**	**100.0**

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 20 February 2020.

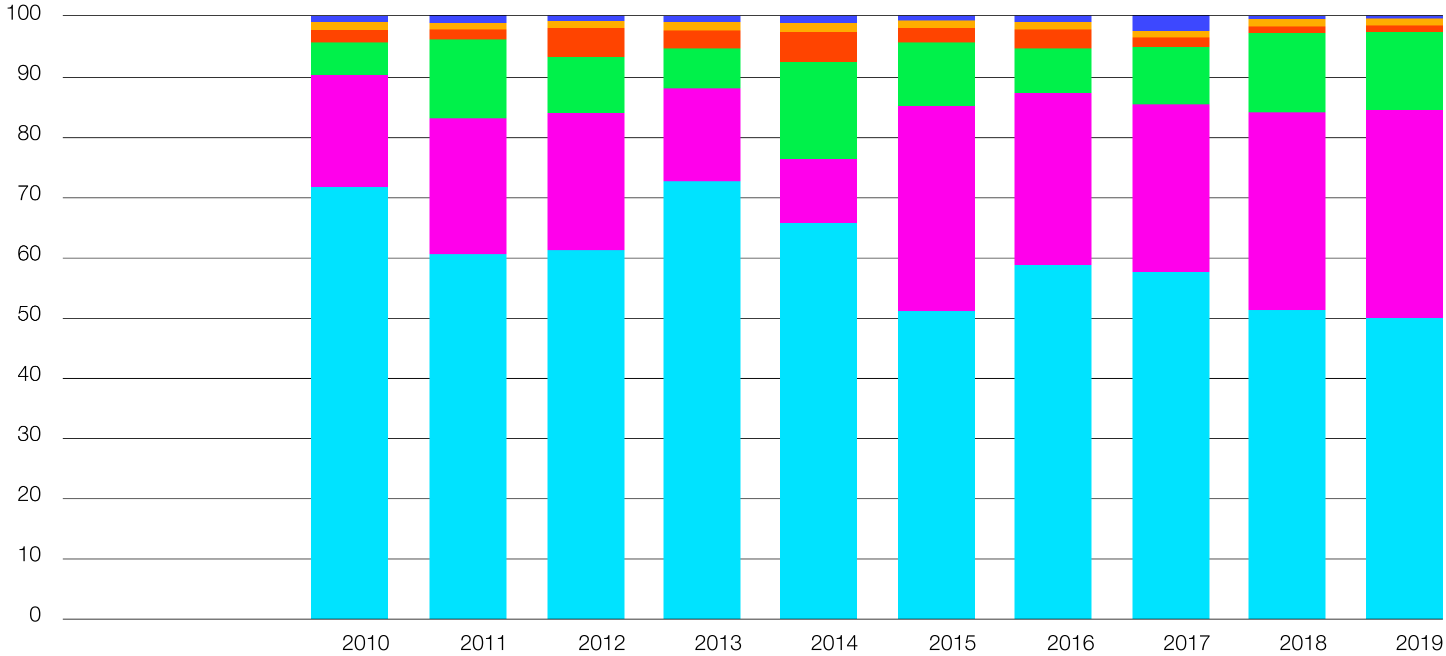
Percentages may not sum to totals due to rounding.

* '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 2010 and 2019. 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 studio-backed titles. The combined share of USA-only and UK studio-backed films was 90% in 2010, but fell to an average of around 84% for the remainder of the period, with the exception of 2014 when the aggregate share was 76%. The main reason for the lower figure in 2014 was the record share achieved by UK independent releases (16%), which included titles such as *Paddington* and *The Inbetweeners 2*, two of the year's top five grossing films.

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, 2010-2019



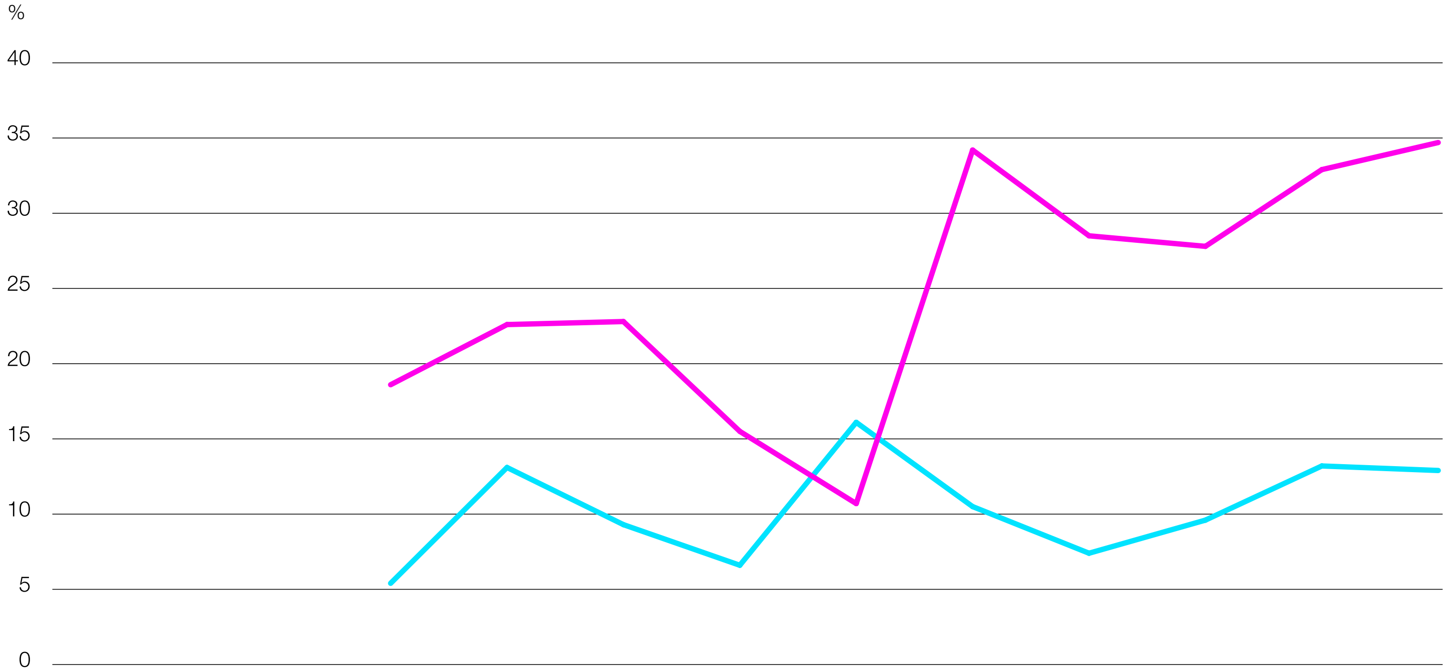
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Rest of the world	0.8	1.0	0.6	0.7	1.1	0.5	0.8	2.3	0.3	0.5
India	1.3	1.0	1.2	1.4	1.5	1.3	1.2	1.1	1.2	1.2
Other Europe	2.1	1.7	4.8	3.0	4.9	2.4	3.2	1.5	1.1	1.1
UK independent	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2	12.9
UK studio-backed*	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9	34.7
USA	71.8	60.6	61.3	72.7	65.8	51.1	58.9	57.7	51.3	50.0

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.

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 share for UK independent films for the 10-year period was just over 10% with a slight upward trend from a low of just over 5% in 2010.

Figure 8 UK films' share of the UK theatrical market, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK studio-backed*	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9	34.7
UK independent	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2	12.9

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 2019, 76.5% of UK films earned less than £1 million at UK and Republic of Ireland cinemas (the second lowest share of the period), while 5% of films earned £20 million or more (the second highest share of the period). One in 10 films released in 2019 earned between £1 million and £5 million while 8% of films earned between £5 million and £20 million, a broadly similar proportion to the rest of the period.

Table 8 UK releases by box office band, 2010-2019 (£ million)

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
2010	Number	3	6	3	10	20	77	119
	%	2.5	5	2.5	8.4	16.8	64.7	100.0
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	100.0

Source: Comscore, BFI RSU analysis

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

BFI

TOP FILMS IN 2019

FACTS IN FOCUS

Three of the top five films released at the UK box office in 2019 were UK qualifying productions. The year's top film, the UK studio-backed title *Avengers: Endgame,* set a new opening record with a take of over £43 million.

- The biggest film of the year was *Avengers: Endgame* with takings of £88.7 million.
- Seventeen films earned £20 million or over at the UK box office in 2019, the same number as in 2018.
- Nine UK qualifying films featured in the top 20 films of the year, one of which was an independent UK film.
- *Downton Abbey*, with takings of £28.2 million, was the highest earning independent UK film of the year.
- The top 20 UK films grossed £527 million, 41% of the total UK box office.
- Independent UK films accounted for 19% of the total box office for the top 20 UK films, compared with 17% in 2018.
- Fourteen UK qualifying films spent a total of 25 weeks at the top of the UK weekend box office charts.
- Specialised films made up over half (54%) of all theatrical releases in 2019; these titles earned £35 million, a 3% share of the overall box office.
- Action was the highest grossing genre of the year with takings of £328 million (25% of the total box office) from 13% of releases.
- There were more '15' releases than any other classification (45%), but '12A' films generated the largest single share of the box office (36%).

TOP FILMS IN 2019

THE TOP 20 FILMS

The top two performing releases at the box office in the UK and Republic of Ireland in 2019 were UK qualifying films (Table 1). *Avengers: Endgame* topped the box office chart with earnings of £89 million followed by *The Lion King* with £76 million. *Avengers: Endgame* is the territory's highest earning UK film since the 2015 release of *Star Wars: The Force Awakens* (£123 million) and *Spectre* (£95 million). In total, nine of the top 20 films in 2019 were UK qualifying productions, eight of which were UK studio-backed projects.

Seventeen films generated grosses of £20 million or over in 2019, the same number as in 2018. Sequels, 'live-action' remakes and franchise films accounted for 16 of the top 20 films (including all of the top 10), up from 15 such films in 2018.

Table 1 Box office results for the top 20 films released in the UK and Republic of Ireland, 2019

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release	Opening weekend gross (£ million)	Distributor
1	Avengers: Endgame	UK/USA	88.7	683	43.4	Walt Disney
2	The Lion King	UK/USA	76.0	725	16.7	Walt Disney
3	Toy Story 4*	USA	66.2	699	13.3	Walt Disney
4	Joker*	USA/Can	58.1	684	12.6	Warner Bros
5	Star Wars: The Rise of Skywalker*	UK/USA	58.1	746	20.9	Walt Disney
6	Frozen II*	USA	53.1	727	15.2	Walt Disney
7	Captain Marvel	USA/Aus	39.5	659	12.7	Walt Disney
8	Spider-Man: Far from Home	UK/USA	37.3	646	14.2	Sony
9	Aladdin	UK/USA	37.2	660	7.1	Walt Disney
10	Jumanji: The Next Level*	USA	35.2	643	9.5	Sony
11	Downton Abbey*	UK/USA#	28.2	741	5.2	Universal
12	Dumbo	UK/USA	25.1	710	6.1	Walt Disney
13	Rocketman	UK/USA	23.4	719	5.3	Paramount
14	Once Upon a Time in Hollywood	USA/Chn	21.5	707	7.6	Sony
15	Little Women*	USA	21.3	703	3.6	Sony
16	Fast & Furious: Hobbs & Shaw	UK/USA	20.7	624	6.4	Universal
17	How to Train Your Dragon: The Hidden World	USA/Jpn	20.0	649	5.3	Universal
18	The Secret Life of Pets 2	USA/Fra/Jpn	19.8	627	3.5	Universal
19	It Chapter Two	USA/Can	18.9	656	7.4	Warner Bros
20	The Lego Movie 2: The Second Part	Den/Nor/Aus/USA	18.7	666	4.0	Warner Bros

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 20 February 2020.

* Film still on release on 20 February 2020.

\# 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 highest earning UK qualifying films of 2019, shown in Table 2, had a combined gross of £527 million, which was 41% of the total UK and Republic of Ireland box office. Sixteen UK films grossed £10 million or over in 2019, one more than in 2018. The top 20 is dominated by UK/USA collaborations, most of which were studio-backed productions. Eight of the titles were UK independent films, one more than in 2018, and they accounted for 19% of the total box office for the top 20 UK films.

Table 2 Box office results for the top 20 UK films released in the UK and Republic of Ireland, 2019

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release	Opening weekend gross (£ million)	Distributor
1	Avengers: Endgame	UK/USA	88.7	683	43.4	Walt Disney
2	The Lion King	UK/USA	76.0	725	16.7	Walt Disney
3	Star Wars: The Rise of Skywalker*	UK/USA	58.1	746	20.9	Walt Disney
4	Spider-Man: Far from Home	UK/USA	37.3	646	14.2	Sony
5	Aladdin	UK/USA	37.2	660	7.1	Walt Disney
6	Downton Abbey*	UK/USA#	28.2	741	5.2	Universal
7	Dumbo	UK/USA/Aus/Can	25.1	710	6.1	Walt Disney
8	Rocketman	UK/USA/Can	23.4	719	5.3	Paramount
9	Fast & Furious: Hobbs & Shaw	UK/USA/Jpn	20.7	624	6.4	Universal
10	Last Christmas	UK/USA	18.1	682	2.7	Universal
11	The Favourite	UK/USA/Ire#	17.0	618	4.0	20th Century Fox
12	Maleficent: Mistress of Evil*	UK/USA/Can	14.8	622	3.3	Walt Disney
13	Yesterday	UK	14.0	681	2.2	Universal
14	Pokémon Detective Pikachu	UK/USA/Can/Jpn	13.8	604	4.9	Warner Bros
15	Cats*	UK/USA	11.9	657	3.2	Universal
16	Stan & Ollie	UK/USA/Can#	10.6	683	2.6	Entertainment One
17	Mary Queen of Scots	UK/USA#	9.3	553	2.1	Universal
18	Judy*	UK	8.2	665	2.1	Pathé
19	Angel Has Fallen*	UK/USA#	7.5	559	2.1	Lionsgate
20	Fisherman's Friends	UK	7.4	539	1.2	Entertainment Film Distributors

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 20 February 2020.

* Film still on release on 20 February 2020.

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

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

THE TOP 30 UK INDEPENDENT FILMS

Table 3 shows an extended box office chart detailing the top 30 highest grossing UK independent film releases of 2019. *Downton Abbey* was the year's top earner with a gross of £28 million, followed by *The Favourite* (£17 million) and *Yesterday* (£14 million). The list includes a number of independent productions which qualified as British under the cultural test for film but which were financed and produced by non-UK production entities. (Titles in this category include *Angel Has Fallen* and *Hellboy*.) For the second consecutive year, the top 30 features one documentary release: Asif Kapadia's biographical film *Diego Maradona* is in 29th place with earnings of £1 million.

The combined earnings of the top 20 films in the list accounted for 87% of the total box office for all independent UK films released in 2019. This is up from 2018, when the top 20 UK independent titles generated 77% of the overall gross for these films.

Table 3 Box office results for the top 30 UK independent films released in the UK and Republic of Ireland, 2019

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release	Opening weekend gross (£ million)	Distributor
1	Downton Abbey*	UK/USA#	28.2	741	5.2	Universal
2	The Favourite	UK/USA/Ire#	17.0	618	4.0	20th Century Fox
3	Yesterday	UK	14.0	681	2.2	Universal
4	Stan & Ollie	UK/USA/Can#	10.6	683	2.6	Entertainment One
5	Mary Queen of Scots	UK/USA#	9.3	553	2.1	Universal
6	Judy*	UK	8.2	665	2.1	Pathé
7	Angel Has Fallen	UK/USA#	7.5	559	2.1	Lionsgate
8	Fisherman's Friends	UK	7.4	539	1.2	Entertainment Film Distributors
9	A Shaun the Sheep Movie: Farmageddon*	UK	7.1	644	1.3	StudioCanal
10	Fighting with My Family	UK/USA#	5.9	576	2.0	Lionsgate
11	Blue Story	UK	4.5	311	1.3	Paramount
12	The Kid Who Would Be King	UK/USA#	3.7	513	0.7	20th Century Fox
13	Blinded by the Light	UK/USA#	3.2	551	1.0	Entertainment One
14	Wild Rose	UK	2.9	478	0.8	Entertainment One
15	Horrible Histories: The Movie - Rotten Romans	UK	2.9	532	0.6	Altitude
16	Peppa Pig: Festival of Fun	UK	2.9	536	1.0	Entertainment One
17	Red Joan	UK	2.8	506	0.4	Lionsgate
18	Colette	UK/USA#	2.5	322	0.8	Lionsgate
19	Official Secrets	UK/USA#	2.4	380	0.5	Entertainment One
20	Cold Pursuit	UK/Can/Fra	2.0	418	0.6	StudioCanal
21	The Aftermath	UK/Ger	2.0	563	0.6	20th Century Fox
22	Hellboy	UK/USA#	1.9	491	1.0	Lionsgate
23	The Aeronauts*	UK/USA#	1.8	577	1.0	Entertainment One
24	Tolkien	UK/USA#	1.8	519	0.6	20th Century Fox
25	Sorry We Missed You	UK/Fra/Bel	1.3	236	0.4	Entertainment One
26	The White Crow	UK/Fra	1.2	139	0.3	StudioCanal
27	Mrs. Lowry and Son	UK	1.2	242	0.3	Vertigo
28	All Is True	UK	1.1	254	0.3	Sony
29	Diego Maradona	UK	1.0	199	0.3	Altitude
30	The Informer	UK/USA#	0.7	453	0.3	Warner Bros

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 20 February 2020.

* Film still on release on 20 February 2020.

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

BEST WEEKEND PERFORMANCE OF UK FILMS

A total of 26 different films topped the UK weekend box office charts over the course of 2019. Fourteen of these were UK titles, which spent a combined total of 25 weeks at number one (Table 4). The table includes theatrical grosses generated over the three-day weekend plus revenues from any previews. In 2018, 11 UK films achieved the number one slot in the weekend charts for a total of 22 weeks.

The UK film holding the top spot for the greatest number of weeks in 2019 was *Aladdin* with a four-week run. (In the overall rankings, however, the Walt Disney live-action remake was second to Warner Bros' *Joker*, which topped the weekend charts for six weeks.) Two UK films topped the chart for three weeks and four UK films topped the chart for two weeks, all of which, with the exception of *Downton Abbey*, were UK studio-backed titles. *Avengers: Endgame*, which held the top spot for two weeks, set a new all-time UK box office opening record with a four-day opening gross of £43.4 million as well as a new UK opening weekend record (Friday-Sunday) with a three-day gross of £31.5 million.

In addition to *Downton Abbey*, three other UK independent films topped the charts in 2019 – *Stan & Ollie, Fighting with My Family* and *Angel Has Fallen* – compared with just one – *Darkest Hour* – in 2018.

Table 4 UK films at number one in the weekend box office charts, 2019

Title	First week at top	Opening weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
Aladdin	24/05/2019	7.1	37.2	Walt Disney	4
The Lion King	19/07/2019	16.7	76.0	Walt Disney	3
Downton Abbey*	13/09/2019	5.2	28.2	Universal	3
Avengers: Endgame	26/04/2019	43.4	88.7	Walt Disney	2
Spider-Man: Far from Home	05/07/2019	14.2	37.3	Sony	2
Dumbo	29/03/2019	6.1	25.1	Walt Disney	2
Star Wars: The Rise of Skywalker*	20/12/2019	20.9	58.1	Walt Disney	2
Stan & Ollie	11/01/2019	2.6	10.6	Entertainment One	1
Fast & Furious: Hobbs & Shaw	02/08/2019	6.4	20.7	Universal	1
Pokémon Detective Pikachu	10/05/2019	4.9	13.8	Warner Bros	1
Fighting with My Family	01/03/2019	2.0	5.9	Lionsgate	1
Mary Poppins Returns	04/01/2019^	8.2	43.4	Walt Disney	1
Angel Has Fallen	23/08/2019	2.1	7.5	Lionsgate	1
Last Christmas*	15/11/2019	2.7	18.1	Universal	1

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 20 February 2020.

Opening weekend gross includes revenues from previews.

* Film still on release on 20 February 2020.

^ *Mary Poppins Returns* was released in 2018 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

Specialised films offer audiences an experience of cinema that is very different from the titles that dominate the overall box office charts. The BFI's definition of 'specialised' is broad and relates to those films that do not sit easily within a mainstream and highly commercial genre. Many are from the independent production sector (although they may be handled by a mainstream, studio-based distributor) or are made with a low production budget (compared to a studio production) and may focus more on script and character than on effects and star names. Specifically, the BFI considers most subtitled foreign language films, documentaries and re-releases of archive/classic films to be specialised.

Non-mainstream films which do not fall into the three main categories but are also considered to be specialised are not included in the following data, due to the subjectivity regarding the categorisation of these films. Generally these films can be described as having a distinctive genre, hook or style, or are films which deal with more complex and challenging subject matter than the majority of mainstream films. (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, 412 documentaries, foreign language films and re-releases of archive/classic films were shown at UK cinemas in 2019, representing 54% of all theatrical releases in the year (Table 5). These films grossed £35 million, a 3% share of total box office earnings.

Table 5 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2019

Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	99	13.0	7.8	0.6	26
Foreign language	346	45.3	29.0	2.2	30
Re-release	41	5.4	3.0	0.2	108
All specialised films*	412	53.9	35.1	2.7	38
All films	764	100.0	1,300.9	100.0	121

Source: Comscore, BFI RSU analysis

Notes:

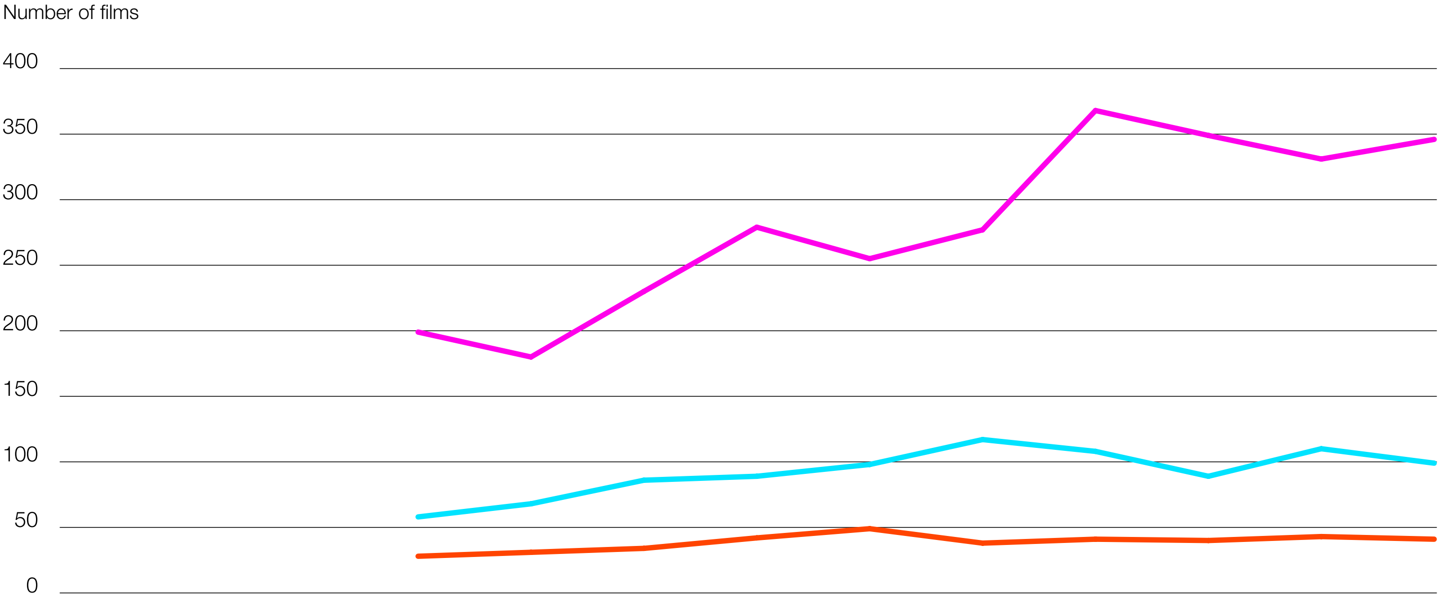
* Due to some overlap of categories (e.g. a film such as *Bergman: A Year in a Life* is categorised as a foreign language film and a documentary) this total refers to the number of specialised films, not the sum total of the categories in the table. This total does not include the category of 'other specialised films' which has been used in previous Yearbooks.

Figures as at 20 February 2020.

TRENDS IN SPECIALISED FILM

As Figure 1 shows, while annual numbers have fluctuated over the past decade there has been an overall upward trend in the volume of releases for all three categories of specialised film covered in the present analysis. The number of theatrically released feature documentaries increased from 58 in 2010 to 99 in 2019, while the number of classic/archive re-releases increased from 28 in 2010 to 41 in 2019. The greatest variation over the period was seen in foreign language films, which, despite a downward trend from 2017, increased by 44% over the period.

Figure 1 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Documentary	58	68	86	89	98	117	108	89	110	99
Foreign language	199	180	230	279	255	277	368	349	331	346
Re-release	28	31	34	42	49	38	41	40	43	41

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 42 different languages (including English) were released in the UK and Republic of Ireland in 2019, three fewer than in 2018.

Foreign language films accounted for 45% of all theatrical releases in 2019 and earned £29 million (2% of the total box office). There were 346 foreign language film releases, up from 331 in 2018. These films were shown on average at 30 sites at their widest point of release compared to an average of 196 sites for English language films. After English, the most common languages, in terms of numbers of releases, were Hindi, Punjabi and Tamil (Table 6). If combined, the 194 cinema releases in the languages of the Indian sub-continent (11) would account for a quarter of all releases in 2019. There were 109 films in European languages (other than English) accounting for 14% of all releases. Hindi was again the top non-English language at the box office by value, with a 0.9% share of overall box office revenues, followed by Spanish (0.2%) and Polish (0.2%).

Table 6 Languages of films released in the UK and Republic of Ireland, 2019 (ranked by gross box office)

	Main language	Number of releases	Gross box office (£ million)	Box office share (%)
	English	396	1,260.7	96.9
	English with others*	22	11.2	0.9
1	Hindi	65	12.2	0.9
2	Spanish	10	2.7	0.2
3	Polish	19	2.4	0.2
4	Punjabi	44	1.9	0.1
5	Tamil	41	1.6	0.1
6	Mandarin	18	1.3	0.1
7	Japanese	5	1.1	0.1
8	French	32	1.1	0.1
9	Arabic	7	0.8	<0.1
10	Malayalam	19	0.7	<0.1
	Other (31 languages)	86	3.2	0.2

Source: Comscore, BBFC, IMDb, BFI RSU analysis

Notes:

* 'English with others' includes films for which the main language was English but with extensive use of other languages, such as *The White Crow* in English, Russian and French.

Figures as at 20 February 2020.

Table 7 shows the top 10 non-Hindi foreign language films of 2019. At number one in the list is Pedro Almodovar's semi-autobiographical film *Pain and Glory* (in Spanish), the overall top earning foreign language release of the year with earnings of £1.5 million. This is the first non-Hindi language release since *Untouchable* (£2.0 million) in 2012 to top the overall foreign language box office charts. In addition to *Pain and Glory*, which was nominated for the best foreign language film award at both the BAFTAs and Academy Awards® in 2020, the list includes a 2019 BAFTA and Oscar® nominee for best foreign language film, *Capernaum*. (The best foreign language film Oscar® was renamed the best international film award in 2020.)

In total, there are six European language releases in the non-Hindi top 10, including three titles in Polish, three releases in other languages from the Indian sub-continent and one release in Arabic.

Table 7 Top 10 foreign language films (excluding Hindi*) released in the UK and Republic of Ireland, 2019

Rank	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	Pain and Glory	Spa	1.5	20th Century Fox	Spanish
2	Polityka	Pol	0.6	Phoenix	Polish
3	Bigil	Ind	0.6	Sun Media	Tamil
4	Capernaum	Leb/Fra/USA	0.5	Picturehouse	Arabic
5	Everybody Knows	Spa/Fra/Ita/Ger	0.5	Universal	Spanish
6	Chal Mera Putt	Ind	0.4	Rhythm Boyz Entertainment	Punjabi
7	Women of Mafia 2	Pol	0.4	Phoenix	Polish
8	Woman at War	Ice/Fra/Ukr	0.3	Picturehouse	Icelandic
9	Underdog	Pol	0.3	Phoenix	Polish
10	Lucifer	Ind	0.3	RFT Films	Malayalam

Source: Comscore, BBFC, IMDb, BFI RSU analysis, distributor websites

Notes:

* For Hindi language titles, see Table 8.

Figures as at 20 February 2020.

Table 8 shows the top 10 Hindi language film releases of 2019. The list is headed by the comedy drama *Good Newwz*, one of two Hindi language releases to earn £1 million or over at the UK and Republic of Ireland box office in the year. The list features instalments from two long-running Bollywood franchises, the police action series Dabangg starring Salman Khan and the comedy series Housefull starring Akshay Kumar. *Housefull 4*, which appears in seventh place in the list, was partly filmed in the UK.

Table 8 Top 10 Hindi language films released in the UK and Republic of Ireland, 2019

Rank	Title	Country of origin	UK box office total (£ million)	Distributor
1	Good Newwz	Ind	1.0	Zee Studios
2	Kalank	Ind	1.0	20th Century Fox
3	Bharat	Ind	0.9	Cinestaan AA
4	War	Ind	0.7	Yash Raj Films
5	Gully Boy	Ind	0.6	Cinestaan AA
6	Dabangg 3	Ind	0.6	Yash Raj Films
7	Housefull 4	Ind	0.6	Walt Disney
8	Total Dhamaal	Ind	0.5	20th Century Fox
9	Mission Mangal	Ind	0.5	20th Century Fox
10	Petta	Ind	0.4	Murugan Talkies

Source: Comscore, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 20 February 2020.

DOCUMENTARIES

A total of 99 feature documentaries (13% of theatrical releases) were released in the UK and Republic of Ireland in 2019, down from 110 in 2018. These films earned £8 million which was 0.6% of the overall box office gross. Table 9 shows the year's top 10 highest earning documentaries. (In a change from previous editions of the Yearbook, concert and non-concert documentaries are not disaggregated.)

Two documentary features earned £1 million or over at the UK and Republic of Ireland box office in 2019: Todd Douglas Miller's *Apollo 11* (£1.4 million), which was released to celebrate the 50th anniversary of the first moon landing, and Asif Kapadia's biographical film *Diego Maradona* (£1.0 million). Half of the top 10 are films about musical performers and performances, the most popular of which was the Aretha Franklin concert film *Amazing Grace*, which earned £0.8 million. The table includes a shorter large-format version of the year's top earning documentary, *Apollo 11: First Steps Edition* (£0.2 million), which was developed for IMAX and museum cinemas and aimed at younger audiences.

Four of the top 10 documentaries are UK films, including Nick Broomfield's *Marianne & Leonard: Words of Love* and the winner of the 2020 BAFTA best documentary award, *For Sama.*

Table 9 Top 10 feature documentaries released in the UK and Republic of Ireland, 2019

Rank	Title	Country of origin	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Apollo 11	USA	1.4	277	Dogwoof
2	Diego Maradona	UK	1.0	199	Altitude
3	Amazing Grace	USA	0.8	116	StudioCanal
4	Pavarotti	USA/Fra/Ita	0.7	126	Entertainment One
5	Marianne & Leonard: Words of Love	UK	0.7	65	Dogwoof
6	Western Stars	USA	0.4	376	Warner Bros
7	Liam Gallagher: As It Was	UK	0.4	24	Altitude
8	Apollo 11: First Steps Edition	USA	0.2	2	Independent
9	For Sama	UK/Syr/USA	0.1	35	Republic
10	RBG	USA	0.1	41	Dogwoof

Source: Comscore, BFI RSU analysis

Note: Figures as at 20 February 2020.

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), Comscore, the Internet Movie Database (IMDb) 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 2019. The pattern of box office by genre each year is usually determined by a small number of high grossing releases. For the fifth consecutive year, action was the top earning genre with a combined gross of £328 million, followed by animation with £312 million. For the second consecutive year, drama was the third highest earning genre with revenues of £166 million. It is unusual for drama to feature in the top three earning genres although it typically represents the highest proportion of releases. In 2019, over one third of releases (35%) were dramas and these films generated 13% of the overall box office.

Twelve of the top performing titles by genre were UK qualifying films, which highlights the variety of story types which underpin British film success. In addition to the top grossing film of the year, *Avengers: Endgame*, these were *The Lion King*, *Downton Abbey, Yesterday, Rocketman, Star Wars: The Rise of Skywalker, Aladdin, Dumbo, Last Christmas, Cats, The Souvenir* and *Gwen.*

Table 10 Films released in the UK and Republic of Ireland by genre, 2019 (ranked by gross box office)

Genre	Number of releases	% of releases	Gross box office (£ million)	% of total box office	Top performing title
Action	102	13.4	328.3	25.2	Avengers: Endgame
Animation	40	5.2	312.1	24.0	The Lion King
Drama	264	34.6	166.4	12.8	Downton Abbey
Comedy	136	17.8	83.5	6.4	Yesterday
Biopic	19	2.5	80.7	6.2	Rocketman
Thriller	20	2.6	75.3	5.8	Joker
Sci-fi	3	0.4	64.3	4.9	Star Wars: The Rise of Skywalker
Horror	37	4.8	60.6	4.7	It Chapter Two
Adventure	8	1.0	44.5	3.4	Aladdin
Family	5	0.7	42.7	3.3	Dumbo
Romance	7	0.9	18.9	1.5	Last Christmas
Musical	8	1.0	12.3	0.9	Cats
Documentary	99	13.0	7.8	0.6	Apollo 11
Crime	11	1.4	2.8	0.2	21 Bridges
Mystery	1	0.1	0.5	<0.1	The Souvenir
War	2	0.3	0.1	<0.1	Saving Private Ryan (D-Day 75th Anniversary)
Fantasy	2	0.3	<0.1	<0.1	Gwen
Total	**764**	**100.0**	**1,300.9**	**100.0**	

Source: Comscore, BFI RSU analysis

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

Image: *Last Christmas* © 2019 Universal Studios

The pattern of genres ranked by the average number of sites at the widest point of release (WPR) is shown in Table 11. The top three genres by average WPR in 2019 were sci-fi, family and animation. The averages for the top two are skewed, however, by the low number of releases in these categories, and the inclusion of studio-backed titles which are typically released into more cinemas than other films.

The title released into the greatest number of cinemas in 2019 was the top earning sci-fi film of the year, *Star Wars: The Rise of Skywalker*, which was shown at 746 sites at its widest point of release. This is the widest ever release in the UK and beats the previous record set by *Mary Poppins Returns* (742) in 2018.

Table 11 Films released in the UK and Republic of Ireland by genre, 2019 (ranked by average widest point of release)

Genre	Number of releases	Box office (£ million)	Average number of sites at widest point of release	Average number of weeks on release
Sci-fi	3	64.3	465	13
Family	5	42.7	447	21
Animation	40	312.1	328	16
Biopic	19	80.7	306	23
Adventure	8	44.5	250	14
Horror	37	60.6	241	8
Action	102	328.3	152	6
Thriller	20	75.3	125	8
Musical	8	12.3	122	8
Romance	7	18.9	121	11
Crime	11	2.8	107	5
Comedy	136	83.5	100	8
War	2	0.1	95	6
Drama	264	166.4	81	10
Mystery	1	0.5	67	24
Documentary	99	7.8	26	11
Fantasy	2	<0.1	13	9
Total	**764**	**1,300.9**	**121**	**10**

Source: Comscore, BFI RSU analysis

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 CLASSIFICATION

Table 12 shows a breakdown of 2019 releases by BBFC film classification. It shows that, as in previous years, more '15' films (45%) were released than any other category, but the largest share of box office gross was earned by '12A' films (36%). The proportion of '15' rated films released was higher than in 2018 (42%) but was lower for '12A' films (32% compared with 34%). Films classified as '15' accounted for 22% of the overall box office gross in 2019 (the same as in 2018), a similar share to 'PG' rated films (down from 25% in 2018).

Table 12 All releases in the UK and Republic of Ireland by BBFC film classification, 2019

	Number of releases	% of all UK releases	Gross box office (£ million)	% of gross box office	Top performing title
U	31	4.1	222.7	17.1	Toy Story 4
PG	96	12.6	283.5	21.8	The Lion King
12A	248	32.5	473.6	36.4	Avengers: Endgame
15	343	44.9	290.1	22.3	Joker
18	35	4.6	31.0	2.4	Once Upon a Time in Hollywood
No classification	11	1.4	0.1	<0.1	Hale County This Morning, This Evening
Total	**764**	**100.0**	**1,300.9**	**100.0**	

Source: Comscore, BBFC, BFI RSU analysis

Note: Figures as at 20 February 2020.

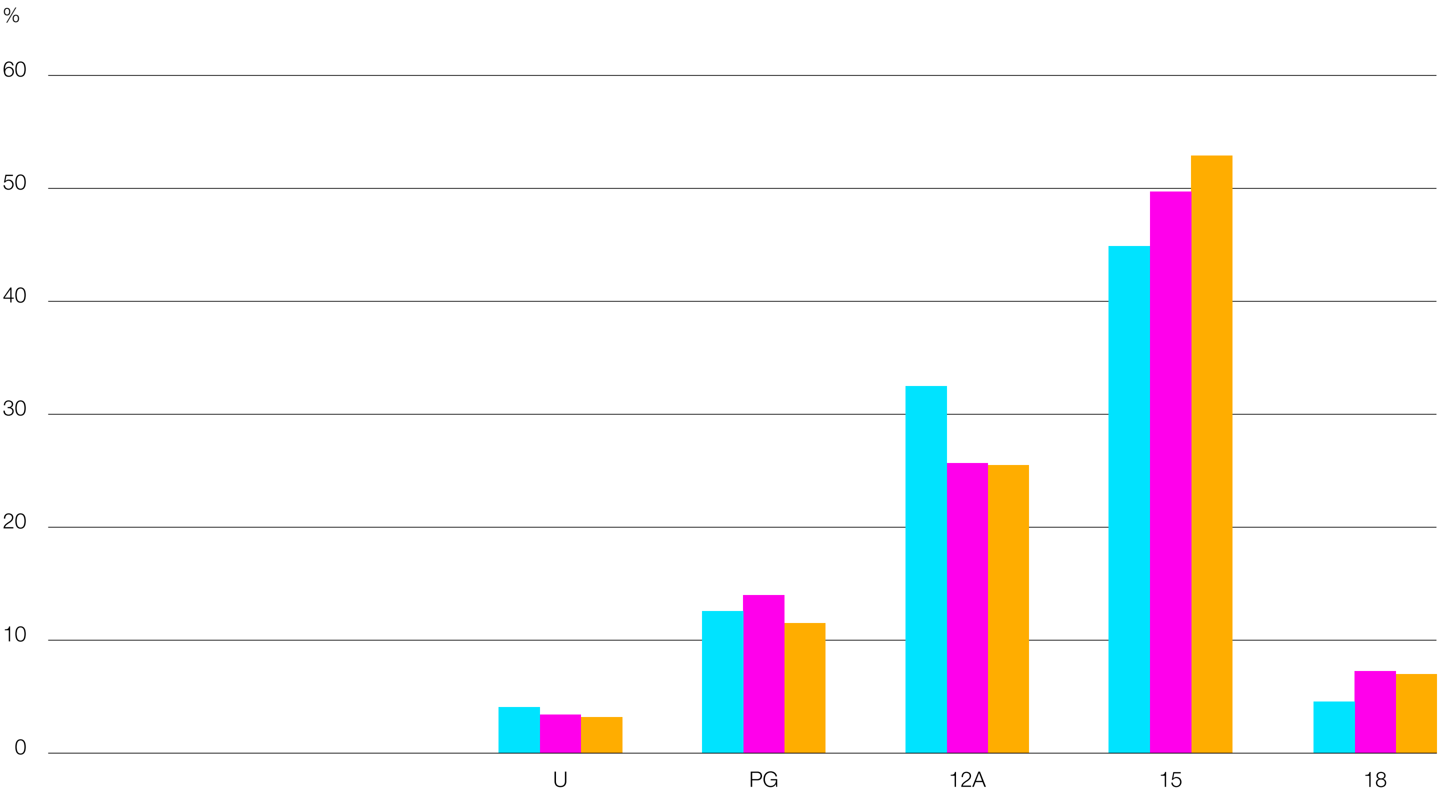
Figures 2 and 3 show a comparison of the share of releases and gross box office by BBFC classification for all films, UK films and UK independent films in 2019. The rankings in terms of release share by classification are the same across all three categories of film type, with titles with a '15' classification accounting for the highest proportion of releases, followed by '12A' and 'PG'. However, there were differences in the proportion of box office takings by classification between the three categories.

For all films and UK films the highest earning classification was '12A', with '15' the second highest earner for all films and 'PG' the second highest earner for UK films. For UK independent films the highest earning classification was '15' followed by 'PG'. Films with a '12A' classification generated 36% of the total box office for all films and 46% of the total box office for UK films, compared to 29% for UK independent films, while films with a '15' classification generated 34.5% of the total box office for UK independent films compared to 22% for all films and 14% for UK films.

Five of the top 10 earning films overall in 2019 were '12A' titles and five of the top 10 earning UK films were '12A' titles, including three titles common to both categories - *Avengers: Endgame*, *Star Wars: The Rise of Skywalker* and *SpiderMan: Far from Home*. Three of the top 10 earning UK independent films released in 2019 were '15' rated titles, including the second highest grossing independent film of the year, *The Favourite*.

The 'U' classification generated a larger proportion of total box office for all films compared with UK films and UK independent films. This is a fixed trend as 'U' rated releases consistently include a significant number of high earning animated titles produced by the US majors which, in 2019, included *Toy Story 4, Frozen 2* and *The Secret Life of Pets 2*.

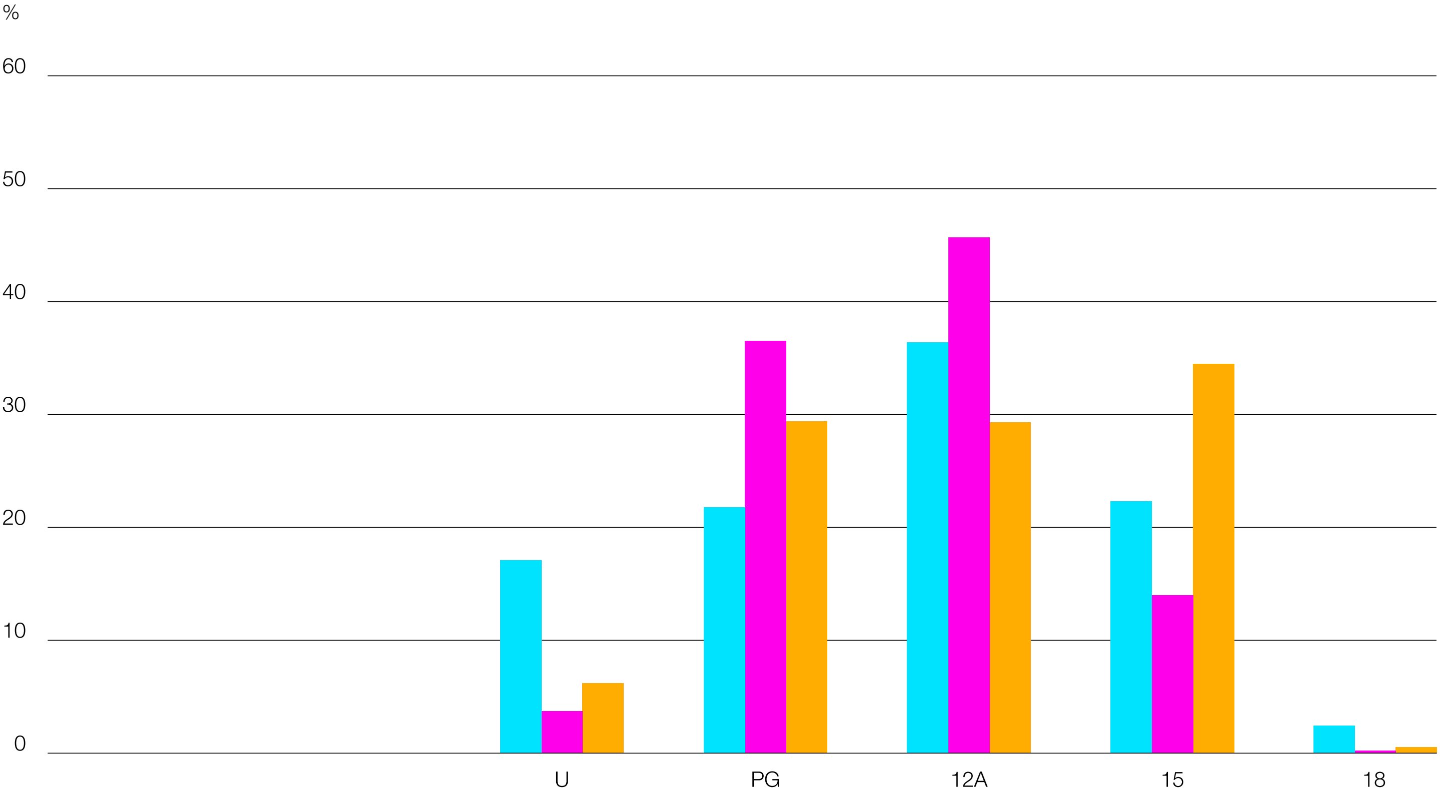
Figure 2 Percentage of releases by BBFC film classification for all films, UK films and UK independent films, 2019



	U	PG	12A	15	18
All film	4.1	12.6	32.5	44.9	4.6
UK film	3.4	14.0	25.7	49.7	7.3
UK independent film	3.2	11.5	25.5	52.9	7.0

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 20 February 2020.

Figure 3 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2019

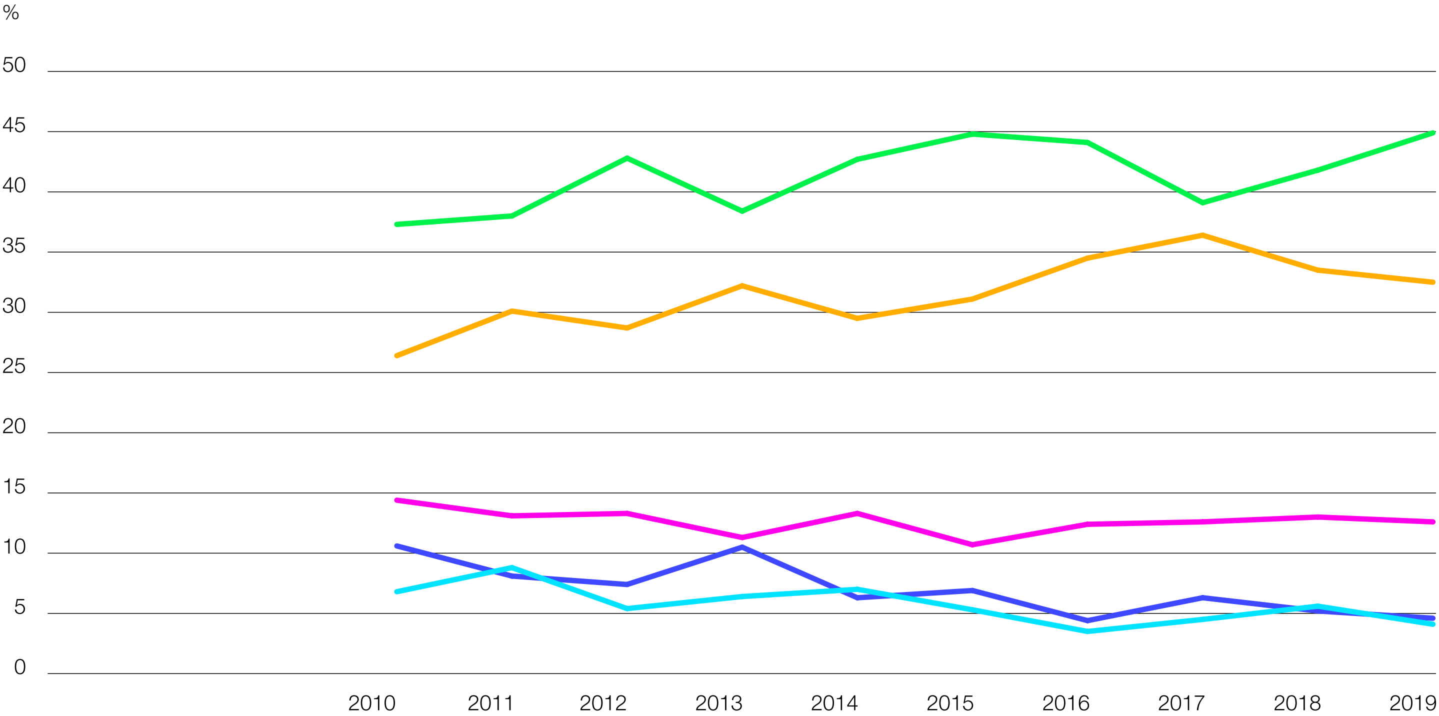


	U	PG	12A	15	18
All film	17.1	21.8	36.4	22.3	2.4
UK film	3.7	36.5	45.7	14.0	0.2
UK independent film	6.2	29.4	29.3	34.5	0.5

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 20 February 2020.

Figure 4 looks at the pattern of releases by classification between 2010 and 2019. Throughout the period, the share of releases for the most common classification ‘15’ has mainly been around 40%, but was as high as 45% in 2015 and 2019. The second and third most common classifications ‘12A’ and ‘PG’ have together generally accounted for between 40%-45% of releases since 2010, but was as high as 49% in 2017. The ‘U’ and ‘18’ classifications have consistently accounted for the smallest percentages of releases over the period. In 2011, 2014 and 2018, there were slightly more ‘U’ films released than ‘18’ films, but in all other years, more ‘18’ films than ‘U’ films were released.

Figure 4 Percentage of releases in the UK and Republic of Ireland by film classification, 2009-2019

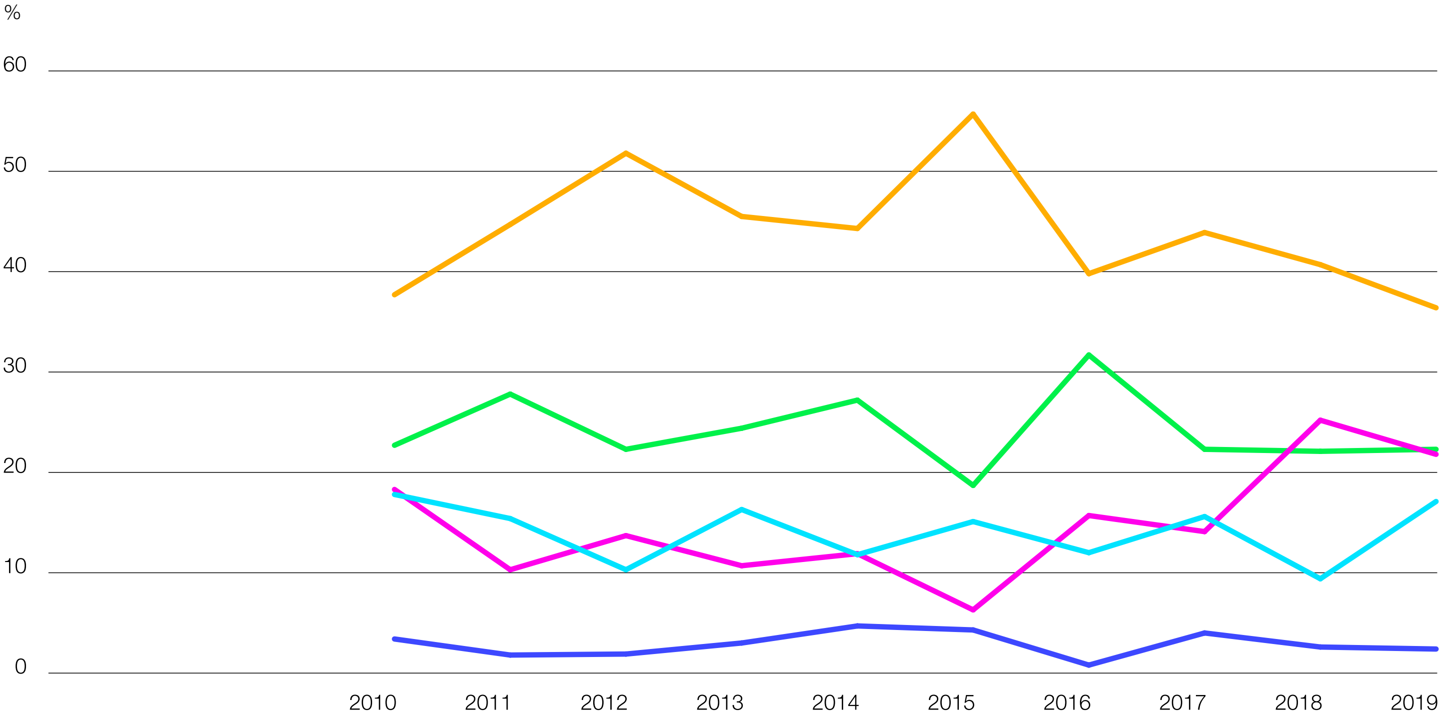


	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
U	6.8	8.8	5.4	6.4	7.0	5.3	3.5	4.5	5.6	4.1
PG	14.4	13.1	13.3	11.3	13.3	10.7	12.4	12.6	13.0	12.6
12A	26.4	30.1	28.7	32.2	29.5	31.1	34.5	36.4	33.5	32.5
15	37.3	38.0	42.8	38.4	42.7	44.8	44.1	39.1	41.8	44.9
18	10.6	8.1	7.4	10.5	6.3	6.9	4.4	6.3	5.2	4.6

Source: Comscore, BBFC, BFI RSU analysis
Note: Figures as at 20 February 2020.

The shares of box office by film classification vary from year to year as demonstrated in Figure 5. However, the box office ranking of the classifications has remained fairly constant over time; the top earner being ‘12A’, with ‘18’ the lowest earner. With the exception of 2018, the ‘15’ classification has been the second highest earning rating over the decade covered in the chart. (The greater box office share for the ‘PG’ classification in 2018 was primarily due to the performance of *Mamma Mia! Here We Go Again* and *Incredibles 2*, which were respectively the year’s second and third highest earning releases). For the majority of the period, however, the ‘PG’ classification exchanged third and fourth place with the ‘U’ classification. The smaller number of releases associated with these two classifications (this is also true of the ‘18’ classification) means that their share of the box office is more susceptible to the effects of a few high earning titles.

Figure 5 Percentage of gross box office of releases in the UK and Republic of Ireland by film classification, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
U	17.8	15.4	10.3	16.3	11.8	15.1	12.0	15.6	9.4	17.1
PG	18.3	10.3	13.7	10.7	11.9	6.3	15.7	14.1	25.2	21.8
12A	37.7	44.7	51.8	45.5	44.3	55.7	39.8	43.9	40.7	36.4
15	22.7	27.8	22.3	24.4	27.2	18.7	31.7	22.3	22.1	22.3
18	3.4	1.8	1.9	3.0	4.7	4.3	0.8	4.0	2.6	2.4

Source: Comscore, BBFC, BFI RSU analysis

Note: Figures as at 20 February 2020.

UK FILMS AND BRITISH TALENT WORLDWIDE

FACTS IN FOCUS

UK qualifying films earned 25% of global box office receipts in 2019, while UK talent and story material continued to showcase British culture and identity to the world.

- The global theatrical market was worth almost $42 billion in 2019; UK films earned $10.3 billion, up from $9.4 billion in 2018.
- UK qualifying independent films earned $1.1 billion at the worldwide box office in 2019, a 2.5% share of the global theatrical market.
- The highest earning UK film at the worldwide box office in 2019 was *Avengers: Endgame* with a gross of $2.4 billion.
- The highest earning UK independent film worldwide in 2019 was *Downton Abbey* with a gross of $176 million.
- The box office share of UK independent films in the USA and Canada was 4%, in Europe (eight major territories, excluding the UK and Republic of Ireland) it was 4%, and in New Zealand it was 8%.
- Of the 200 highest earning films at worldwide cinemas from 2010-2019, 26 are based on stories and characters created by UK writers. Together they have earned $19 billion at the global box office.
- British acting talent has played lead and/or supporting roles in 67.5% of the highest earning 200 films from 2010-2019.
- UK directors were behind 31 of the 200 highest earning films worldwide from 2010-2019, which collectively have earned over $20 billion.
- UK films and British talent won 27 major film awards in 2019/20, including six Oscars® and 13 BAFTAs.

UK FILMS AND BRITISH TALENT WORLDWIDE

UK FILMS AT THE GLOBAL BOX OFFICE

UK qualifying films earned a record worldwide gross of $10.3 billion in 2019, a 25% share of the global box office, which also hit a new record of $41.7 billion (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 22% of the worldwide box office in 2019, with earnings of $9.2 billion. UK qualifying independent films earned 2.5% of global revenues in 2019, with a gross of $1.1 billion. 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 34% share of the box office and UK independent films had 13%).

Table 1 UK films global market share, 2010-2019

Year	Global theatrical market (US$ billion)	UK films worldwide gross (US$ billion)	UK share (%)	UK studio-backed films share (%)	UK independent films share (%)
2010	31.7	4.5	14.2	12.6	1.6
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

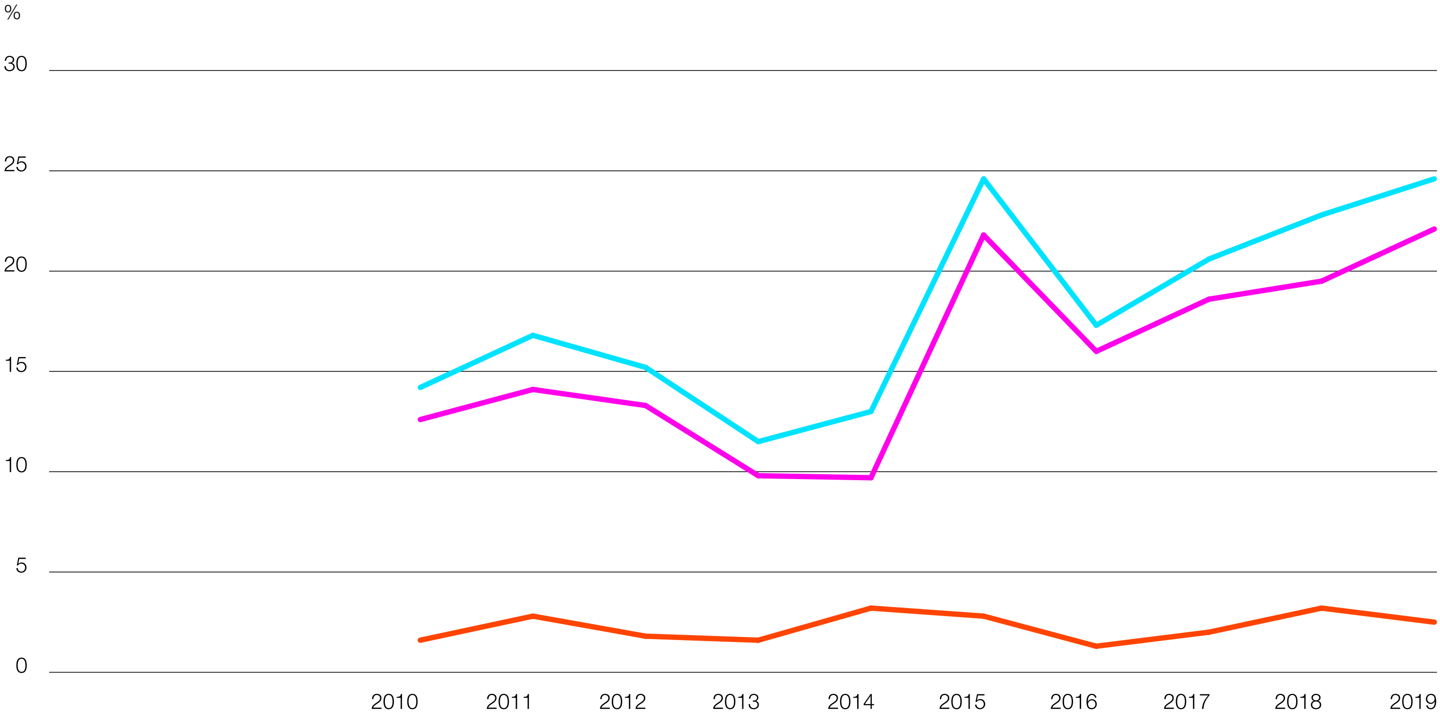
Source: BFI, Comscore, Omdia

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

As Figure 1 shows, the annual global market share for UK films is closely aligned with the success of inward investment titles supported by the major Hollywood studios. 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.

The annual global market share for UK independent films over the period has ranged from 1.3% (2016) to 3.2% (2014 and 2018).

Figure 1 UK films global market share, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK share (%)	14.2	16.8	15.2	11.5	13.0	24.6	17.3	20.6	22.8	24.6
UK studio-backed films share (%)	12.6	14.1	13.3	9.8	9.7	21.8	16.0	18.6	19.5	22.1
UK independent films share (%)	1.6	2.8	1.8	1.6	3.2	2.8	1.3	2.0	3.2	2.5

Source: BFI, Comscore, Omdia

See note to Table 1.

The top 10 highest earning UK qualifying films released at the worldwide box office in 2019 is made up exclusively of studio-backed titles, all of which are either franchise films, 'live-action' remakes or sequels (Table 2). The list is headed by *Avengers: Endgame*, which was to become the highest grossing film of all time at the worldwide box office, with earnings (to 20 February 2020) of just under $2.4 billion.

Table 2 Top 10 UK qualifying films worldwide, 2019

Rank	Title	Country of origin	Worldwide box office gross (US$ million)
1	Avengers: Endgame	UK/USA	2,364.1
2	The Lion King	UK/USA	1,404.0
3	Spider-Man: Far from Home	UK/USA	975.4
4	Star Wars: The Rise of Skywalker	UK/USA	941.3
5	Aladdin	UK/USA	909.3
6	Fast & Furious: Hobbs & Shaw	UK/USA	626.0
7	Maleficent: Mistress of Evil	UK/USA	415.4
8	Pokémon Detective Pikachu	UK/USA/Jpn	383.9
9	Dumbo	UK/USA	301.1
10	Men in Black: International	UK/USA	224.6
	Total top 10		**8,545.1**

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 20 February 2020, in territories where the film was released in 2019. Box office takings from territories where the film was released in 2018 or 2020 are not included in this total.

Figures may not sum to total due to rounding.

Table 3 lists the top 10 highest earning UK qualifying independent films at the worldwide box office in 2019. The list is headed by *Downton Abbey* ($176 million) one of three releases to earn over $100 million at worldwide cinemas in the year. While only two UK independent films grossed more than $100 million worldwide in 2018 – *Red Sparrow* ($115.5 million) and *Johnny English Strikes Again* ($112 million) – all of the top 10 films in that year earned over $50 million, compared with only four titles in 2019.

Table 3 Top 10 UK independent films worldwide, 2019

Rank	Title	Country of origin	Worldwide box office gross ($ million)
1	Downton Abbey	UK/USA*	175.6
2	Yesterday	UK	142.7
3	Angel Has Fallen	UK/USA*	130.4
4	Cold Pursuit	UK/Can/Fra	60.1
5	The Favourite	UK/USA/Ire*	47.0
6	Hellboy	UK/USA*	43.7
7	Judy	UK	37.9
8	Fighting with My Family	UK/USA*	35.9
9	47 Meters Down: Uncaged	UK	34.0
10	A Shaun the Sheep Movie: Farmageddon	UK	29.9
	Total top 10		**737.2**

Source: BFI, Comscore

Notes:

See notes to Table 2.

The Favourite was released in multiple territories, including the USA and Canada, in 2018. Its total gross from those territories was $35.7 million.

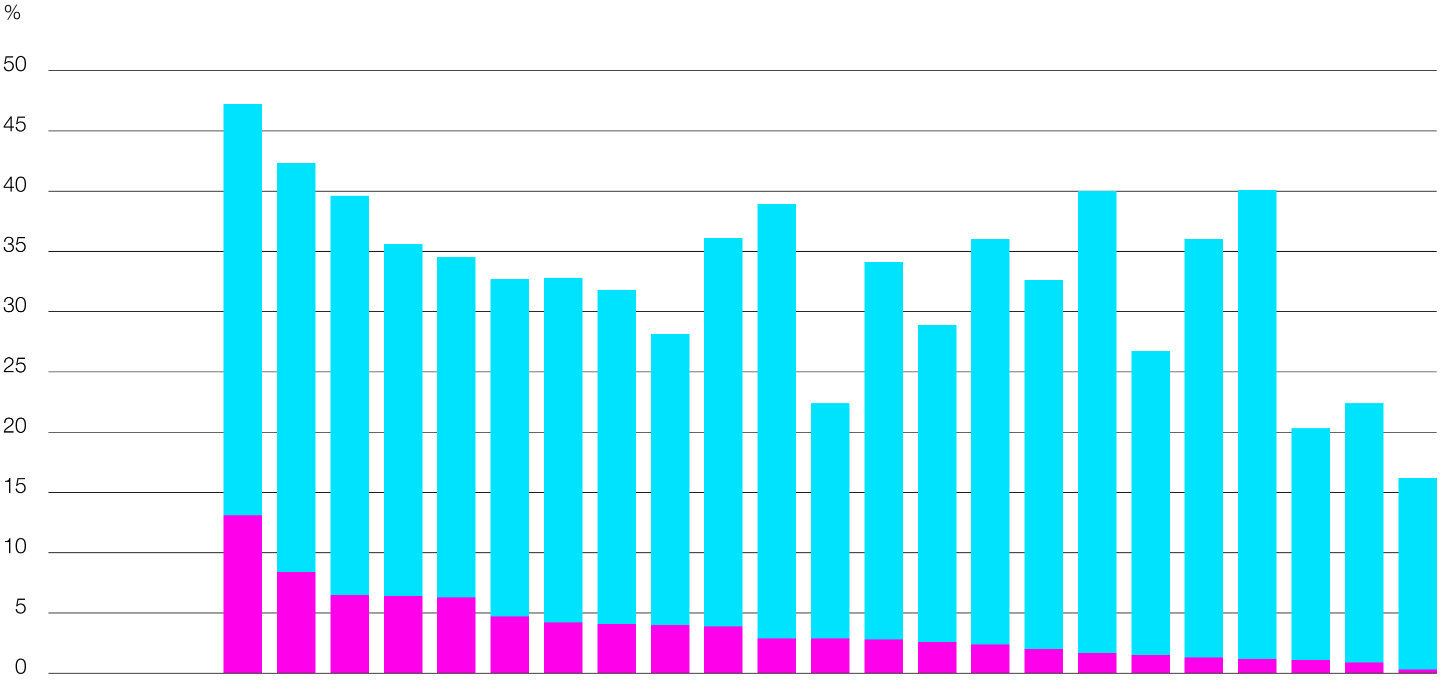
Judy was released in multiple territories, including France, Germany and Spain, in 2020.

A Shaun the Sheep Movie: Farmageddon was released in multiple territories, including Australia and New Zealand, in 2020. It was not released theatrically in the USA and Canada.

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

Figure 2 shows the market share of UK films in 23 selected global territories (including the UK and Republic of Ireland), ranked by the share for UK independent films. After the UK and Republic of Ireland, New Zealand had the highest share for UK independent films in 2019 at 8%, followed by Australia with 6.5%.

Figure 2 UK market share in selected global territories, 2019



	UK and Republic of Ireland	New Zealand	Portugal	Netherlands	Australia	Italy	Spain	Germany	Austria	Hong Kong	Colombia	Singapore	France	Russia	Malaysia	Mexico	USA and Canada	Brazil	Chile	Argentina	Japan	South Korea	China
UK studio-backed film share (%)	34.1	33.9	33.1	29.2	28.2	28.0	28.6	27.7	24.1	32.2	36.0	19.5	31.3	26.3	33.6	30.6	38.3	25.2	34.7	38.9	19.2	21.5	15.9
UK independent film share (%)	13.1	8.4	6.5	6.4	6.3	4.7	4.2	4.1	4.0	3.9	2.9	2.9	2.8	2.6	2.4	2.0	1.7	1.5	1.3	1.2	1.1	0.9	0.3
Total UK share (%)	47.2	42.4	39.5	35.6	34.5	32.7	32.8	31.8	28.1	36.1	38.9	22.4	34.1	29.0	36.0	32.7	40.1	26.7	3.0	40.2	20.4	22.4	16.2

Source: BFI, Comscore

UK FILMS IN NORTH AMERICA

UK films earned $4.1 billion at the box office in the USA and Canada in 2019, just over 36% of the total market, and the highest share since our records began (Table 4). The share for UK studio-backed titles was 32% ($3.7 billion) and for UK independent films was 4% ($439.5 million).

Table 4 UK market share in the USA and Canada, 2010-2019

Year	Total UK films share %	UK studio-backed films share %	UK independent films share %
2010	14.2	12.4	1.8
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

Source: BFI, Comscore

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

Image: *Aladdin*

The top 20 UK qualifying films released at the USA and Canada box office in 2019 grossed just under $4 billion (Table 5). With earnings of $858 million, the top earning title *Avengers: Endgame* was the highest grossing UK film in North America since the 2015 release of the first title in the Star Wars series reboot *The Force Awakens* (£922 million). There are five UK independent titles in the top 20, up from four in 2018. The top earning UK independent films were *Downton Abbey* ($97 million), *Yesterday* ($73 million) and *Angel Has Fallen* ($69 million).

Table 5 Top 20 UK films in the USA and Canada (including co-productions), 2019

Rank	Title	Country of origin	USA and Canada box office gross (US$ million)
1	Avengers: Endgame	UK/USA	858.4
2	The Lion King	UK/USA	543.6
3	Star Wars: The Rise of Skywalker	UK/USA	513.3
4	Spider-Man: Far from Home	UK/USA	390.5
5	Aladdin	UK/USA	355.6
6	Fast & Furious: Hobbs & Shaw	UK/USA	174.0
7	1917#	UK/USA	146.5
8	Pokémon Detective Pikachu	UK/USA/Jpn	144.1
9	Dumbo	UK/USA	114.8
10	Maleficent: Mistress of Evil	UK/USA	113.9
11	Downton Abbey	UK/USA*	96.9
12	Rocketman	UK/USA	96.4
13	Men in Black: International	UK/USA	80.0
14	Yesterday	UK	73.3
15	Angel Has Fallen	UK/USA*	69.0
16	Dora and the Lost City of Gold	UK/USA	60.5
17	Last Christmas	UK/USA	35.2
18	Cold Pursuit	UK/Can/Fra	32.1
19	Cats	UK/USA	27.2
20	Judy	UK	24.3
	Total top 20		**3,949.6**

Source: BFI, Comscore

See notes to Table 2.

1917 was released in all other markets in 2020. Its takings from North America alone made it the 11th highest earning release of 2019 at the global box office.

* 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 in 2019 in a selection of other major European territories, including Russia, was 28.5% (Table 6). Shares ranged from a high of 36% in the Netherlands to 22% in France. The Netherlands also had the largest share for UK independent films (6.4%) where *Downton Abbey* was the top UK independent title. Overall in the selected territories, UK qualifying independent films generated 4% of box office revenues, down from 6% in 2018.

Table 6 UK market share in selected European territories, 2019 (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
Netherlands	131.6	35.6	29.2	6.4	Downton Abbey
Portugal	33.9	34.5	28.2	6.3	Angel Has Fallen
Germany	350.4	32.7	28.0	4.7	Yesterday
Spain	228.5	32.8	28.6	4.2	Yesterday
Austria	46.1	31.8	27.7	4.1	Yesterday
Italy	197.3	28.1	24.1	4.0	Downton Abbey
France#	352.3	22.4	19.5	2.9	Downton Abbey
Russia	244.6	26.7	25.2	1.5	Hellboy
Total eight territories	**1,574.5**	**28.5**	**24.9**	**3.6**	**Downton Abbey**

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 2019 was *The Lion King* with an eight-territory gross of $314 million (Table 7). Four other titles generated receipts in excess of $100 million: *Avengers: Endgame, Star Wars: The Rise of Skywalker, Aladdin* and *Spider-Man: Far from Home*. The highest earning UK independent film across the territories was *Downton Abbey* with earnings of $25 million. In total, seven of the top 20 titles were UK independent films, one more than in 2018.

Table 7 Top 20 UK films in selected European territories, 2019

Rank	Title	Country of origin	Box office gross (US$ million)
1	The Lion King	UK/USA	313.6
2	Avengers: Endgame	UK/USA	256.6
3	Star Wars: The Rise of Skywalker	UK/USA	179.4
4	Aladdin	UK/USA	121.0
5	Spider-Man: Far from Home	UK/USA	105.3
6	Maleficent: Mistress of Evil	UK/USA	98.9
7	Fast & Furious: Hobbs & Shaw	UK/USA	84.6
8	Dumbo	UK/USA	67.3
9	Pokemon: Detective Pikachu	UK/USA/Jpn	53.0
10	Men in Black: International	UK/USA	30.9
11	Downton Abbey	UK/USA*	25.1
12	Last Christmas	UK/USA	23.9
13	Yesterday	UK	23.0
14	Rocketman	UK/USA	22.4
15	Angel Has Fallen	UK/USA*	19.8
16	The Favourite	UK/USA/Ire*	17.9
17	A Shaun the Sheep Movie: Farmageddon#	UK	16.3
18	Dora and the Lost City of Gold	UK/USA	13.6
19	Cold Pursuit	UK/Can/Fra	12.6
20	Hellboy	UK/USA*	10.2
	Total eight territories		**1,495.4**

Source: BFI, Comscore

See notes to Table 2.

The box office gross for *A Shaun the Sheep Movie: Farmageddon* excludes revenues from Russia where the film was released in 2020.

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

UK FILMS IN LATIN AMERICA

The overall market share for UK films in 2019 in the selected Latin American territories listed in Table 8 was 36% (an increase from 30% in 2018); the share in individual territories ranged from 40% in Chile to 33% in Mexico. The highest grossing UK film in these territories was *Avengers: Endgame* with a combined box office of $215 million, whilst the highest grossing UK qualifying independent film was *Angel Has Fallen* ($8 million). The overall share for UK independent films in the five Latin American territories was 2%, down from 4% in 2018.

Table 8 UK market share in selected Latin American territories, 2019 (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 independent UK film
Colombia	70.3	36.0	33.6	2.4	Angel Has Fallen
Mexico	375.7	32.7	30.6	2.0	Angel Has Fallen
Brazil	286.9	40.1	38.3	1.7	Yesterday
Argentina	63.1	36.0	34.7	1.3	Cold Pursuit
Chile	55.3	40.2	38.9	1.2	Cold Pursuit
Total five territories	**851.3**	**35.9**	**34.0**	**1.9**	**Angel Has Fallen**

Source: BFI, Comscore

See notes to Table 2.

UK FILMS IN ASIA

The overall market share for UK films across the six Asian territories in Table 9 was 18.5%. Shares ranged from a high of 39% in Singapore to 16% in China. The share for UK independent films ranged from 2.9% in Singapore to just 0.3% in China. It should be noted, however, that China has a quota system which limits the number of foreign films shown in the territory; in 2019 less than 10 UK independent titles were released.

Avengers: Endgame was the most successful UK film in the selected Asian territories in 2019 with combined earnings of $853 million while *Angel Has Fallen* ($19 million) was the top earning UK qualifying independent film. Overall UK independent films had a 0.6% share of these markets, a decrease from 1.2% in 2018.

Table 9 UK market share in selected Asian territories, 2019 (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 independent UK film
Singapore	51.5	38.9	36.0	2.9	Angel Has Fallen
Hong Kong	85.2	34.1	31.3	2.8	Angel Has Fallen
Malaysia	79.6	29.0	26.3	2.6	47 Meters Down: Uncaged
Japan	442.2	20.4	19.2	1.1	Yesterday
South Korea	428.5	22.4	21.5	0.9	47 Meters Down: Uncaged
China	1,468.8	16.2	15.9	0.3	Angel Has Fallen
Total six territories	**2,555.8**	**18.5**	**17.9**	**0.6**	**Angel Has Fallen**

Source: BFI, Comscore

See notes to Table 2.

UK FILMS IN AUSTRALASIA

The overall market share for UK films in the two Australasian territories listed in Table 10 was 40%, up from 35% in 2018. The UK film *Avengers: Endgame* ($68 million) was the top earning title overall in both territories, while *Downton Abbey* ($12 million) was the highest grossing UK independent film in both territories. UK independent films had a 7% share of the combined box office, a decrease from 9.5% in 2018.

Table 10 UK market share in selected Australasian territories, 2019 (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 independent UK film
New Zealand	56.4	42.4	33.9	8.4	Downton Abbey
Australia	330.0	39.5	33.1	6.5	Downton Abbey
Total two territories	**386.4**	**39.9**	**33.2**	**6.7**	**Downton Abbey**

Source: BFI, Comscore

See notes to Table 2.

UK TALENT AND THE GLOBAL BOX OFFICE, 2010-2019

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 worldwide between 2010 and 2019 were shot wholly or partly in the UK, while 18 of the top 20 films feature British actors in lead or supporting roles. One of the 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.

Table 11 Top 20 grossing films worldwide, 2010-2019

Rank	Title	Year	Gross box office (US$ million)	Country of origin	UK talent/source material
1	Avengers: Endgame	2019	2,797.9	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	1,671.7	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	1,518.6	USA	Supporting actors
8	Frozen II	2019	1,435.4	USA	Supporting actors
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	1,340.7	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	1,308.5	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	1,167.2	USA/Fra	Supporting actors
20	Captain America: Civil War	2016	1,153.6	USA/Ger	Supporting actors

Source: BFI, Comscore

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 from 2010 to 2019, 26 are based on stories and characters created by UK writers, and collectively these films have earned $19 billion at the global box office, 13% of the total (Table 12).

As the original creative voice behind four of the top 200 earning films since 2010, JK Rowling is the most influential UK author in the top 200 list. These films – two Harry Potter titles and two Fantastic Beasts titles – have generated a worldwide box office of $3.8 billion, 2.6% of the total gross for the top 200 films. The list includes the trilogy of films based on *The Hobbit* by JRR Tolkien (total gross $2.9 billion), and two films based on the James Bond novels by Ian Fleming ($2.0 billion). It includes one title released in 2019, *How to Train Your Dragon: The Hidden World,* which is one of three films in the top 200 based on the series of novels by Cressida Cowell ($1.6 billion).

In addition to films adapted from previously published works, the 26 films include a number of titles based on original screenplays, three of which – *Inception, Interstellar* and *Dunkirk* – were written or co-written by Christopher Nolan. (Nolan also co-wrote the script for another top 200 title - *The Dark Knight Rises*.) The list includes one title – *Mamma Mia! Here We Go Again* – which was based on the book for the musical *Mamma Mia!* by Catherine Johnson.

Table 12 Top grossing films worldwide based on stories and characters created by UK writers, 2010-2019

Rank	Title	Year	Gross box office (US$ million)	Country of origin	UK source material
1	Harry Potter and the Deathly Hallows: Part 2	2011	1,340.7	UK/USA	Novel by JK Rowling
2	Skyfall	2012	1,108.7	UK/USA	Novels by Ian Fleming
3	Alice in Wonderland	2010	1,025.1	USA	Novel by Lewis Carroll
4	The Hobbit: An Unexpected Journey	2012	1,021.1	USA/NZ	Novel by JRR Tolkien
5	The Jungle Book	2016	967.3	UK/USA	Stories by Rudyard Kipling
6	Harry Potter and the Deathly Hallows: Part 1	2010	960.6	UK/USA	Novel by JK Rowling
7	The Hobbit: The Desolation of Smaug	2013	960.6	USA/NZ	Novel by JRR Tolkien
8	The Hobbit: The Battle of the Five Armies	2014	956.1	USA/NZ	Novel by JRR Tolkien
9	Spectre	2015	880.8	UK/USA	Novels by Ian Fleming
10	Inception	2010	828.0	UK/USA	Original screenplay by Christopher Nolan
11	Fantastic Beasts and Where to Find Them	2016	812.5	UK/USA	Original screenplay by JK Rowling
12	Interstellar	2014	674.4	USA	Original screenplay by Christopher and Jonathan Nolan
13	Fantastic Beasts: The Crimes of Grindelwald	2018	652.4	UK/USA	Original screenplay by JK Rowling
14	Sing	2016	634.0	USA	Original screenplay by Garth Jennings
15	How to Train Your Dragon 2	2014	621.4	USA	Novels by Cressida Cowell
16	Fifty Shades of Grey	2015	571.0	USA	Novel by EL James
17	Sherlock Holmes: A Game of Shadows	2011	545.7	UK/USA	Novels by Arthur Conan Doyle
18	Dunkirk	2017	528.7	UK/USA	Original screenplay by Christopher Nolan
19	How to Train Your Dragon: The Hidden World	2019	522.0	USA	Novels by Cressida Cowell
20	How to Train Your Dragon	2010	494.9	USA	Novels by Cressida Cowell
21	The King's Speech	2010	419.1	UK/USA	Original screenplay by David Seidler
22	Kingsman: The Secret Service	2015	418.5	UK/USA	Comic book series by Mark Millar and Dave Gibbons
23	The Chronicles of Narnia: The Voyage of the Dawn Treader	2010	417.4	UK/USA	Novel by CS Lewis
24	Kingsman: The Golden Circle	2017	410.9	UK/USA	Comic book series by Mark Millar and Dave Gibbons
25	Mamma Mia! Here We Go Again	2018	393.4	UK/USA	Musical book by Catherine Johnson
26	Fifty Shades Darker	2017	381.6	USA	Novel by EL James

Source: BFI, Comscore

UK ACTORS

The global prominence of UK acting talent is reflected in Table 13 which shows that 67.5% of the top 200 films at the worldwide box office since 2010 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, 2010-2019

Films that have…	Number of films	Gross box office ($US billion)	% of total gross for top 200 films
UK lead actor(s) only	19	14.3	9.7%
UK supporting actor(s) only	83	63.0	42.9%
UK lead and supporting actor(s)	33	26.9	18.3%
Total	**135**	**104.1**	**70.9%**

Source: BFI, Comscore

Notes:

Includes live action and animated titles.

Figures may not sum to totals due to rounding.

UK DIRECTORS

Thirty-one of the 200 highest grossing films at the global box office between 2010 and 2019 were helmed by British directors (Table 14). David Yates was the most commercially successful British director of the decade, with total top 200 box office takings of $3.8 billion from the final two films in the Harry Potter series and the two Fantastic Beasts spin-offs. Christopher Nolan is in second place with earnings of $3.1 billion from four top 200 titles: *The Dark Knight Rises, Inception, Interstellar* and *Dunkirk*. Guy Ritchie, who is fourth in the list with total earnings of $1.6 billion, is the only UK director with a 2019 release (*Aladdin*) in the top 200.

One woman features amongst the 18 British directors of top 200 films: Sam Taylor-Johnson appears in 12th place in the list with a gross of $571 million for her 2015 release *Fifty Shades of Grey*. In total, the 31 feature films in the list generated a box office gross of over $20 billion.

Table 14 UK directors of the top 200 grossing films worldwide, 2010-2019

Rank	Director	Film	Year	Total gross box office (US$ million)
1	David Yates	Harry Potter and the Deathly Hallows: Part 2	2011	1,340.7
		Harry Potter and the Deathly Hallows: Part 1	2010	960.6
		Fantastic Beasts and Where to Find Them	2016	812.5
		Fantastic Beasts: The Crimes of Grindelwald	2018	652.4
		Total		*3,766.2*
2	Christopher Nolan	The Dark Knight Rises	2012	1,084.9
		Inception	2010	828.0
		Interstellar	2014	674.4
		Dunkirk	2017	528.7
		Total		*3,116.0*
3	Sam Mendes	Skyfall	2012	1,108.7
		Spectre	2015	880.8
		Total		*1,989.5*
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*
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	Tom Hooper	Les Misérables	2012	442.1
		The King's Speech	2010	419.1
		Total		*861.2*
9	Matthew Vaughn	Kingsman: The Secret Service	2015	418.5
		Kingsman: The Golden Circle	2017	410.9
		Total		*829.4*
10	David Slade	The Twilight Saga: Eclipse	2010	698.5
11	Garth Jennings	Sing	2016	634.0
12	Sam Taylor-Johnson	Fifty Shades of Grey	2015	571.0
13	Rupert Wyatt	Rise of the Planet of the Apes	2011	482.9
14	Duncan Jones	Warcraft	2016	433.6
15	Michael Apted	The Chronicles of Narnia: The Voyage of the Dawn Treader	2010	417.4
16	Paul Greengrass	Jason Bourne	2016	416.4
17	Rupert Sanders	Snow White and the Huntsman	2012	401.0
18	Ol Parker	Mamma Mia! Here We Go Again	2018	393.4

Source: BFI, Comscore

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

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 2019/20 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.)

Table 15 also shows the total number of awards won in the calendar year 2019, to provide a comparison with previous years. In 2019, UK films and talent won 26 awards, representing 14% of the prizes available. This is down slightly from 2018 when 28 awards were won, but the share (14%) of available awards was the same. (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.)

Table 15 Numbers of UK award winners, 2010-2019/20

Year	Number of UK award winners	UK share %
2010	24	12
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
Total (to end of 2019)	**257**	**14**
2017/18 awards cycle	*33*	*18*
2018/19 awards cycle	*25*	*13*
2019/20 awards cycle	*27*	*15*

Source: BFI

UK films and filmmakers won 27 awards in the 2019/20 awards cycle, 16 of which were won or shared by British women or by British films made by women (Table 16). There were UK wins at four of the major film festivals in 2019: two at Sundance, three at Cannes, two at Venice, and one at Toronto. At the awards ceremonies in 2020, UK films and filmmakers won a total of 13 BAFTAs and six Oscars®. Sam Mendes's *1917* was the season's biggest UK winner with a tally of seven BAFTAs and three Academy Awards® while there were double BAFTA and Oscar® wins for costume designer Jacqueline Durran (*Little Women*) and the documentary short *Learning to Skateboard in a Warzone* (*If You're a Girl*).

In addition, at the 2019 Berlin Festival, *Shooting the Mafia*, a USA-Ireland film directed by British filmmaker Kim Longinotto was awarded third place in the Panorama Audience Award (Documentary) category, while Renée Zellweger won the best actress prize for her performance in the UK film *Judy* at both the BAFTAs and Academy Awards® in 2020. (These awards do not appear in the following list as they were presented to non-UK films or individuals.)

Table 16 UK award winners, 2019/20

Award ceremony/ festival	Award	Recipient	Title
Sundance Film Festival 24 January-3 February 2019	World Cinema Grand Jury Prize: Dramatic	Film; award presented to Joanna Hogg	The Souvenir
	Alfred P. Sloan Feature Film Prize	Film; award presented to Chiwetel Ejiofor	The Boy Who Harnessed the Wind
Cannes Film Festival 14-25 May 2019	Best Actress	Emily Beecham	Little Joe
	Golden Eye Documentary Prize	Film; award presented to Waad Al-Kateab and Edward Watts	For Sama
	Chopard Trophy	Florence Pugh	-
Venice International Film Festival 28 August - 7 September 2019	Golden Lion for Lifetime Achievement	Julie Andrews	-
	Fondazione Mimmo Rotella Award	Mick Jagger (with Giuseppe Capotondi and Donald Sutherland)	The Burnt Orange Heresy
Toronto International Film Festival 5-15 September 2019	FIPRESCI Special Presentations	Film; award presented to Coky Giedroyc	How to Build a Girl
British Academy Film Awards 2 February 2020	Best Film	Film; award presented to Pippa Harris, Callum McDougall, Sam Mendes and Jayne-Ann Tenggren	1917
	British Short Animation	Film; award presented to Maryam Mohajer	Grandad was a Romantic
	British Short Film	Film; award presented to Elena Andreicheva (with Carol Dysinger)	Learning to Skateboard in a Warzone (If You're a Girl)
	Cinematography	Roger Deakins	1917
	Costume Design	Jacqueline Durran	Little Women
	Director	Sam Mendes	1917
	Documentary	Film; award presented to Waad Al-Kateab and Edward Watts	For Sama
	EE Rising Star Award	Micheal Ward	-
	Outstanding British Film	Film; award presented to Sam Mendes, Pippa Harris, Jayne-Ann Tenggren, Callum McDougall and Krysty Wilson-Cairns	1917
	Outstanding Debut by a British Writer, Director or Producer	Mark Jenkin (writer/director), Kate Byers (producer) and Linn Waite (producer)	Bait
	Production Design	Lee Sandales (with Dennis Gassner)	1917
	Sound	Oliver Tarney, Rachael Tate, Mark Taylor and Stuart Wilson (with Scott Millan)	1917
	Special Visual Effects	Dominic Tuohy (with Greg Butler and Guillaume Rocheron)	1917
Academy Awards® 9 February 2020	Cinematography	Roger Deakins	1917
	Costume Design	Jacqueline Durran	Little Women
	Music written for motion pictures (Original song)	"(I'm Gonna) Love Me Again", Elton John and Bernie Taupin	Rocketman
	Sound Mixing	Mark Taylor and Stuart Wilson	1917
	Visual Effects	Dominic Tuohy (with Greg Butler and Guillaume Rocheron)	1917
	Best Documentary (short)	Film; award presented to Elena Andreicheva (with Carol Dysinger)	Learning to Skateboard in a Warzone (If You're a Girl)

Source: BFI

DISTRIBUTION

FACTS IN FOCUS

The UK theatrical marketplace is dominated by a few very large companies. In 2019, the top 10 distributors generated £1.27 billion in box office revenues, while the remainder made £62 million.

- The top 10 distributors had a 95% share of the market in 2019; Walt Disney was the top earning distributor with theatrical revenues of £507 million.
- The market share for the 130 distributors outside the top 10 was 5%.
- The highest earning distributor of UK independent films was Universal, but Entertainment One and Altitude handled the largest number of such films.
- In 2019, 63% of films were released at fewer than 50 sites, compared with 64% in 2018.
- In 2019, eight titles including *Star Wars: The Rise of Skywalker, Downton Abbey* and *The Lion King* were released at over 700 sites, compared with only two in 2018.
- In 2019, 29% of total theatrical revenue was generated during opening weekends.
- The estimated total amount spent by distributors on advertising films released theatrically was £201 million.

Cover image: *Star Wars: The Rise of Skywalker*

DISTRIBUTION

DISTRIBUTORS

The top 10 feature film distributors in 2019 had a 95% share of the market from the release of 248 titles (27% of all films on release). The top 10 distributors in 2018 achieved a similar share from 251 releases (26% of films on release). A further 130 film distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2019, compared with 128 companies outside the top 10 in 2018. In 2019, distributors outside the top 10 handled a total of 671 titles (73% of all films on release) but generated only 5% of the total box office.

Table 1 shows box office takings by distributor for all films on release during 2019, and hence includes revenues for titles which were released in 2018 but remained in cinemas into 2019. The top earning distributor was Walt Disney, with total revenues of £507 million, a 38% share of the overall box office. Walt Disney's market share is the largest achieved by a single distributor since our records begin. (If added to the total from 20th Century Fox, which Walt Disney acquired in early 2019, the total share would be 44%.) Walt Disney titles made up eight of the top 20 releases of 2019, including the year's three highest earning films, *Avengers: Endgame* (£89 million), *The Lion King* (£76 million) and *Toy Story 4* (£66 million). The second highest earning distributor in 2019 was Universal, which released four of the year's top 20 titles including *Downton Abbey* (£28 million), *Fast & Furious: Hobbs & Shaw* (£21 million) and *How to Train Your Dragon: The Hidden World* (£20 million).

The top earning independent distributor in 2019 was Lionsgate, whose highest grossing titles were *Knives Out* (£13 million), *John Wick: Chapter 3 – Parabellum* (£10 million) and *Angel Has Fallen* (£7.5 million).

Table 1 Distributor share of box office, UK and Republic of Ireland, 2019

Distributor	Market share (%)	Films on release in 2019	Box office gross (£ million)
Walt Disney	37.9	24	506.8
Universal	13.9	39	185.6
Warner Bros	12.4	40	166.3
Sony	9.3	27	124.7
Paramount	5.9	13	79.0
20th Century Fox*	5.7	30	75.5
Lionsgate	4.2	19	56.4
Entertainment One	3.8	27	50.4
STX Entertainment	1.2	7	15.4
StudioCanal	1.0	22	14.0
Top 10	95.4	248	1,274.1
Others (Total 130 distributors)	4.6	671	61.6
Total	**100.0**	**919**	**1,335.8**

Source: Comscore

Notes:

The total here differs from Table 5 as it includes all films on release in 2019, including titles first released in 2018.

Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2019 to 31 December 2019.

Figures may not sum to sub-totals/totals due to rounding.

* From October 2019, 20th Century Fox titles were released under the Walt Disney label.

Table 2 shows the top 10 distributors by market share between 2010 and 2019. Four different distributors claimed the top spot in the first six years of the period: Warner Bros (2010, 2011, 2013), Sony (2012), 20th Century Fox (2014) and Universal (2015). Between 2016 and 2019, Walt Disney was the UK's highest earning film distributor, the longest consecutive run in the top spot since our records began. Six independent distributors have ranked among the top 10 distributors of the year over the period. Entertainment One has featured in the list every year, while Lionsgate, Optimum/StudioCanal and Entertainment Film Distributors have each appeared nine times. In 2019, STX Entertainment appeared in the list for the first time. Its top earning titles included US independent titles *Hustlers* (£8 million) and *The Upside* (£2 million).

Throughout the period, the share of box office generated by distributors outside the top 10 has ranged from 3.7% in 2014 to 6.3% in 2010. The share in 2019, at 4.6%, was the highest since 2012.

Table 2 Distributor market share as percentage of box office gross, 2010-2019 (ranked by 2019 market share)

Distributor	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Walt Disney	14.0	8.7	10.2	15.2	10.1	20.0	23.2	19.7	23.6	37.9
Universal	10.2	11.8	10.7	15.1	11.2	21.6	14.0	16.0	19.5	13.9
Warner Bros	18.3	18.2	12.9	17.2	15.9	9.0	15.6	16.6	13.9	12.4
Sony	6.9	7.2	18.0	8.7	6.2	11.8	6.6	10.3	10.7	9.3
Paramount	14.8	16.3	7.7	7.8	5.8	4.0	5.4	3.7	4.8	5.9
20th Century Fox[1]	15.9	12.1	16.1	13.1	21.8	14.9	15.7	15.1	14.5	5.7
Lionsgate	3.5	-	5.7	4.7	5.5	4.0	4.0	6.3	1.5	4.2
Entertainment One	5.5	5.1	6.7	9.0	8.0	3.9	8.4	2.5	3.2	3.8
STX Entertainment	-	-	-	-	-	-	-	-	-	1.2
Optimum/StudioCanal[2]	2.2	3.8	-	2.8	6.7	4.7	1.5	4.2	2.8	1.0
Entertainment Film Distributors	2.5	6.7	3.1	1.9	5.2	1.6	1.5	1.7	1.1	-
Momentum[3]	-	4.6	4.3	-	-	-	-	-	-	-
Top 10 total[4]	93.7	94.4	95.4	95.5	96.3	95.5	95.9	96.1	95.5	95.4
Others	6.3	5.6	4.6	4.5	3.7	4.5	4.1	3.9	4.5	4.6
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] 20th Century Fox was bought by Walt Disney in March 2019. From October 2019, existing 20th Century Fox titles were released under the Walt Disney label.

[2] Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

[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.

Tables 3 and 4 show the top 10 distributors of foreign language films and independent UK titles released in the UK and Republic of Ireland in 2019. (In total, 764 films were released theatrically in 2019.)

Foreign language films accounted for 45% of releases at the UK box office in 2019, grossing a total of £29 million (2% of overall box office). The high volume of foreign language releases is reflected by the number of companies in the UK handling such titles: 96 different distributors released non-English language films in the year. As Table 3 shows, the top 10 distributors associated with these films released 69 (20%) of the total 346 foreign language titles. These films generated £17.2 million which equates to 59% of the overall box office for foreign language films.

Hindi, Punjabi and Tamil were the most popular non-English languages for films released in the year, so companies releasing titles from the Indian subcontinent – such as 20th Century Fox, Zee Studios, Cinestaan AA and Yash Raj Films – feature highly in the list. In addition to releasing seven Hindi language films, including *Kalank* (£1 million) and *Total Dhamaal* (£0.5 million), the top earning distributor in this category, 20th Century Fox, distributed the highest grossing foreign language film of the year *Pain and Glory* (in Spanish) which earned £1.5 million at the UK and Republic of Ireland box office. (For more on the year's top earning foreign language titles, see the Top films in 2019 chapter.)

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2019 (ranked by box office gross)

Distributor	Number of foreign language films released in 2019	Average widest point of release	Box office gross (£ million)
20th Century Fox	8	94	4.1
Zee Studios	14	42	2.4
Cinestaan AA	8	49	2.2
Yash Raj Films	6	72	1.9
Phoenix	4	239	1.3
Picturehouse	4	54	1.3
Curzon Artificial Eye	12	23	1.1
National Amusements	2	111	1.1
Magnetes Pictures	11	104	0.9
Sun Media	15	17	0.9

Source: Comscore, BFI RSU analysis

In total, 75 distributors released independent UK films in 2019, generating a combined box office gross of £168 million (13% of the total box office) from 168 releases. The 49 films released by the top 10 distributors of independent UK titles accounted for £162 million, which equates to 96% of the box office generated by these films (Table 4). Universal had the largest share of box office for UK independent films with earnings of £52 million from four titles, which included the year's top earning UK independent film *Downton Abbey* (£28 million) and two other top 10 UK independent titles, *Yesterday* (£14 million) and *Mary Queen of Scots* (£9 million). Entertainment One and Altitude had the highest number of releases in this category with nine each. Entertainment One's top earning UK independent film release was *Stan & Ollie* (£11 million), while Altitude's top earning UK independent title was *Horrible Histories: The Movie - Rotten Romans* (£3 million).

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2019 (ranked by box office gross)

Distributor	Number of UK independent films released in 2019	Average widest point of release	Box office gross (£ million)
Universal	4	554	51.8
20th Century Fox	6	492	32.9
Entertainment One	9	410	25.6
Lionsgate	7	359	20.7
StudioCanal	6	220	10.5
Entertainment Film Distributors	3	386	8.8
Altitude	9	115	5.2
Paramount	1	311	4.5
Vertigo	3	89	1.3
Sony	1	254	1.1

Source: Comscore, BFI RSU analysis

Image: *Horrible Histories: The Movie - Rotten Romans* courtesy of Altitude Distribution

WIDTH OF RELEASE

Table 5 shows the number and share of films released in the UK and Republic of Ireland from 2015 to 2019 by widest point of release (WPR). While the number of releases has fluctuated across the period, each year around three quarters of all films were released at fewer than 100 sites and around two thirds of films were released at fewer than 50 sites. There has been a downward trend in the share of films released at 200-599 sites but an upward trend in the share of films released at 100-199 sites and 600 sites or over. In 2019, eight titles including *Star Wars: The Rise of Skywalker* (WPR of 746), *Downton Abbey* (WPR of 741) and *The Lion King* (WPR of 725) were released at over 700 sites compared with only two in 2018.

Table 5 Number and share of releases by widest point of release, 2015-2019

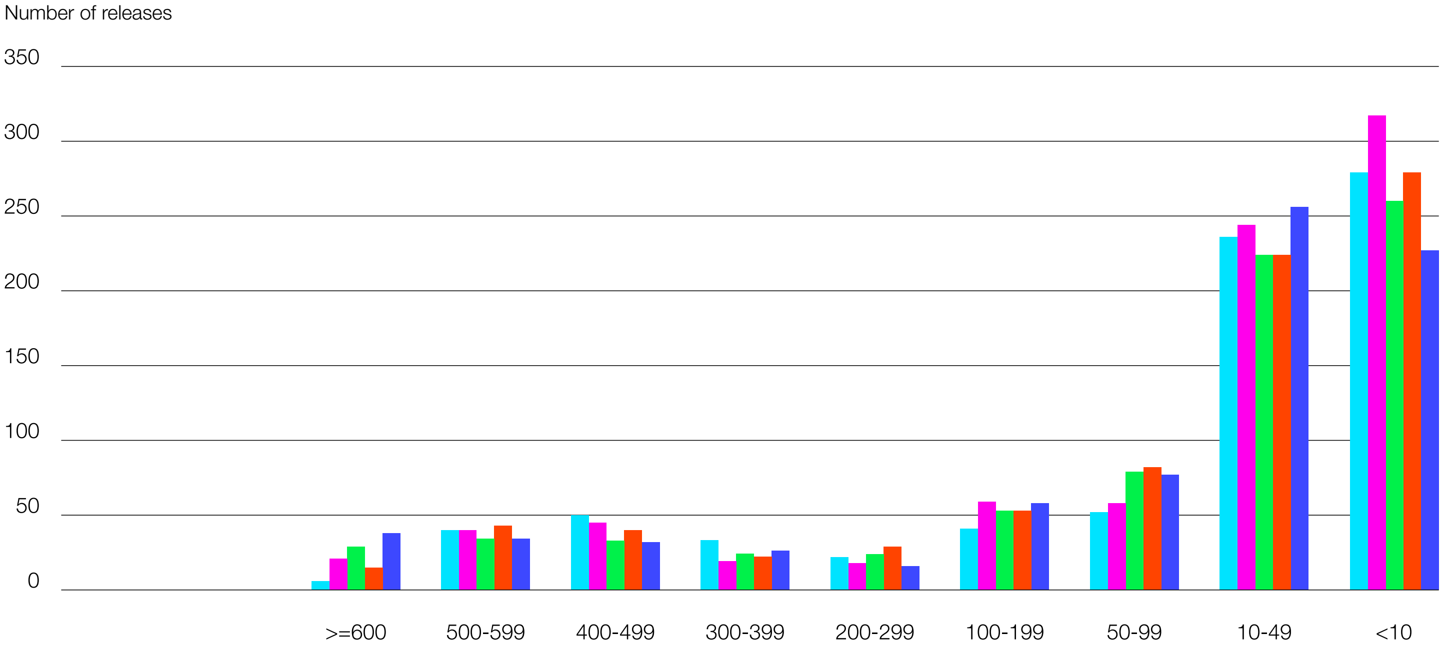
	2015		2016		2017		2018		2019	
Sites at widest point of release	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases
>=600	6	0.8	21	2.6	29	3.8	15	1.9	38	5.0
500-599	40	5.3	40	4.9	34	4.5	43	5.5	34	4.5
400-499	50	6.6	45	5.5	33	4.3	40	5.1	32	4.2
300-399	33	4.3	19	2.3	24	3.2	22	2.8	26	3.4
200-299	22	2.9	18	2.2	24	3.2	29	3.7	16	2.1
100-199	41	5.4	59	7.2	53	7.0	53	6.7	58	7.6
50-99	52	6.9	58	7.1	79	10.4	82	10.4	77	10.1
10-49	236	31.1	244	29.7	224	29.5	224	28.5	256	33.5
<10	279	36.8	317	38.6	260	34.2	279	35.5	227	29.7
Total	**759**	**100.0**	**821**	**100.0**	**760**	**100.0**	**787**	**100.0**	**764**	**100.0**

Source: Comscore, BFI RSU analysis

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

Figure 1 shows that between 2015 and 2019 more films were shown at fewer than 50 sites at their widest point of release than at any of the higher WPR bands. For the first time since our records began, in 2019 more films were released at 10-49 sites (256) than were released at less than 10 sites (227). The chart shows the declining numbers of releases at WPR bands between 200 and 499 sites. In 2019, the numbers of films released at 200-299 sites (16) and 400-499 sites (32) were the lowest since our records began.

Figure 1 Number of releases by widest point of release, 2015-2019



	2015	2016	2017	2018	2019
>=600	6	21	29	15	38
500-599	40	40	34	43	34
400-499	50	45	33	40	32
300-399	33	19	24	22	26
200-299	22	18	24	29	16
100-199	41	59	53	53	58
50-99	52	58	79	82	77
10-49	236	244	224	224	256
<10	279	317	260	279	227

Source: Comscore

WEEKEND BOX OFFICE

In 2019, 59.5% of box office revenue was taken during weekends (Friday to Sunday), up slightly from 59% in 2018 (Table 6). The pattern of box office takings by day has remained largely consistent throughout the decade covered in the table with the exception of the middle of the working week, which was boosted for the first five years by the 'Orange/EE Wednesdays' promotion. Since the end of this promotion in February 2015, the box office share has been more evenly distributed across weekdays, although the subsequent 'Meerkat Movies' promotion, which offers two-for-one tickets on Tuesdays and Wednesdays, is likely to be responsible for some of the increase seen in Tuesday attendances.

Table 6 Box office percentage share by weekday/weekend 2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Friday	16.0	16.6	16.4	15.8	15.3	15.3	16.1	15.7	15.5	15.3
Saturday	24.1	23.8	24.1	24.9	25.2	23.9	24.6	24.7	24.1	24.6
Sunday	18.5	17.6	17.6	18.2	18.8	18.8	18.3	18.9	19.1	19.6
Weekend	**58.6**	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**	**58.7**	**59.5**
Monday	9.5	9.2	9.3	8.9	9.1	9.5	9.7	8.7	9.6	9.6
Tuesday	9.3	9.1	9.3	9.4	9.4	10.6	10.4	10.3	10.0	10.1
Wednesday	13.2	13.9	13.4	12.6	12.4	10.8	10.9	11.3	11.2	10.0
Thursday	9.3	9.8	9.8	10.2	9.8	10.9	10.1	10.6	10.6	10.9
Weekday	**41.4**	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**	**41.3**	**40.6**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Comscore

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

For many films the opening weekend box office represents a significant proportion of their final theatrical gross. In 2019, 29% of total theatrical revenue was generated during opening weekends (Table 7). The table illustrates that the highest earning films generally take the lowest share of overall box office during their opening weekend. Four of the top 10 films released in 2019 took 22% or less of their final gross during their opening: *The Lion King* (22%), *Joker* (22%; to 20 February 2020), *Toy Story 4* (20%) and *Aladdin* (19%). The biggest film of the year, however, *Avengers: Endgame,* generated 49% of its total box office during its four-day opening. (Its opening gross of £43.4 million set a new UK all-time box office record overtaking the £41.3 million earned by *Spectre* when it opened in 2015.)

Table 7 Opening weekend as percentage of total box office, by box office band, 2010-2019

Range of box office (£ million)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
>30	27.4	29.4	27.0	24.0	27.1	32.2	27.2	26.5	26.9	30.1
20-30	35.8	22.6	22.4	30.9	21.9	25.9	28.0	33.3	24.7	24.7
10-19.9	26.1	27.6	24.6	27.6	30.9	25.6	29.1	28.5	25.3	24.8
5-9.9	26.7	26.2	26.1	28.4	25.9	28.7	32.2	33.2	29.5	28.7
1-4.9	30.4	32.2	31.8	32.1	30.3	32.3	33.1	32.1	34.5	31.0
0.2-0.9	31.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1	35.6	39.1
<0.2	34.8	38.5	37.8	38.3	40.0	39.6	39.6	41.4	41.6	43.9
All films	**28.6**	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**	**27.9**	**28.9**

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

The opening weekend is recognised as being crucial to the success of a film, both in cinemas and on subsequent release platforms. A good opening weekend, for example, may encourage exhibitors to continue to screen a film, and is likely to have a positive impact on the rest of the value chain. This is particularly important for independent films which do not have the backing of the major studios. Distributors invest heavily in advertising across all media (television, outdoor, print, radio and digital) in order to raise a film's profile with potential audiences.

Nielsen estimates that the total advertising spend by distributors in 2019 was £201 million, up 2% from £197.5 million in 2018 (Table 8). Overall expenditure on traditional media (television, outdoor, print and radio) was £161 million, an increase of 5% on 2018. This was driven, however, by an increase in spend in only two categories: outdoor and radio advertising expenditure increased by 33% and 28% respectively compared with 2018, while spend on both press and television decreased by 15%.

The Nielsen data indicate a fall in advertising spend on digital media in 2019 compared with 2018. It should be noted that the data for digital advertising only cover 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 2019. However, as the data for this category is not wholly comprehensive, we believe this share to be an underestimate.

Table 8 Estimated advertising spend 2010-2019 (£ million)

Medium	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
TV	76.0	90.8	89.1	89.2	101.0	102.2	93.3	81.1	79.2	67.2
Outdoor	61.0	69.1	67.2	71.2	64.2	60.5	52.8	56.5	54.9	73.1
Press	19.9	22.0	21.5	20.7	24.2	21.3	14.9	14.0	10.8	9.2
Radio	7.6	6.8	6.8	5.9	4.6	7.4	5.7	12.1	8.7	11.1
Sub-total	**164.5**	**188.7**	**184.6**	**187.0**	**194.0**	**191.4**	**166.7**	**163.7**	**153.6**	**160.6**
Digital*	6.1	8.5	4.0	2.5	1.1	0.7	46.4	65.5	43.7	40.5
Total	**170.6**	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**	**197.5**	**201.1**

Source: Nielsen Media Research

Notes:

Figures may not sum to totals due to rounding.

* The figures for 2014 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2010-2013, 2014-2015 and 2016-2019.

Table 9 shows the share of advertising spend on traditional media only from 2010 to 2019. It does not include digital advertising activity due to the reporting limitations described above.

Over the period, the majority of advertising spend on traditional media has been allocated to TV and outdoor advertisements. These two categories accounted for over 80% of traditional media advertising spend each year, with TV taking the largest share of the two, with the exception of 2019, when the share of spend on TV advertising was 42% compared with 45.5% for outdoor advertising. 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 2010 to 6% in 2019. Conversely, the share of advertising spend on radio has seen an overall increase during the period, despite a more fluctuating trend line, rising from 5% in 2010 to 7% in 2019, when the percentage of advertising spend on radio was greater than for press for the first time since our records began.

Table 9 Share of traditional media advertising spend, 2010-2019

Medium	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
TV	46.2	48.1	48.3	47.7	52.1	53.4	56.0	49.5	51.6	41.8
Outdoor	37.1	36.6	36.4	38.1	33.1	31.6	31.7	34.5	35.7	45.5
Press	12.1	11.7	11.6	11.1	12.5	11.1	8.9	8.6	7.0	5.7
Radio	4.6	3.6	3.7	3.2	2.4	3.9	3.4	7.4	5.7	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.

Figures may not sum to totals due to rounding.

EXHIBITION

FACTS IN FOCUS

Cinemas provide the best environment for people to enjoy films as they are intended - on the big screen, with a large audience. The performance of the commercial exhibition sector is therefore an important indicator of the vitality of film culture.

- At the end of 2019, the UK had 4,480 screens in 808 cinemas.
- Multiplexes accounted for 48% of cinema sites and 82% of screens.
- There were just under seven screens for every 100,000 people in the UK, lower than countries such as the USA (12.4), France (9.3), Australia (9.2) and Spain (7.7).
- Only 7% of screens showed mainly 'specialised' (i.e. non-mainstream) programming, with 0.2% dedicated to Asian films.
- At the end of 2019, the three largest exhibitors owned 38% of all UK cinemas and 63% of screens.
- The average ticket price at commercial cinemas in 2019 was £7.12, down from £7.21 in 2018.
- The top three exhibitors had a 65% share of the UK and Republic of Ireland box office.
- Event cinema screenings earned a record-breaking £52 million at the UK and Republic of Ireland box office in 2019, up 24% compared with 2018 (£42 million).

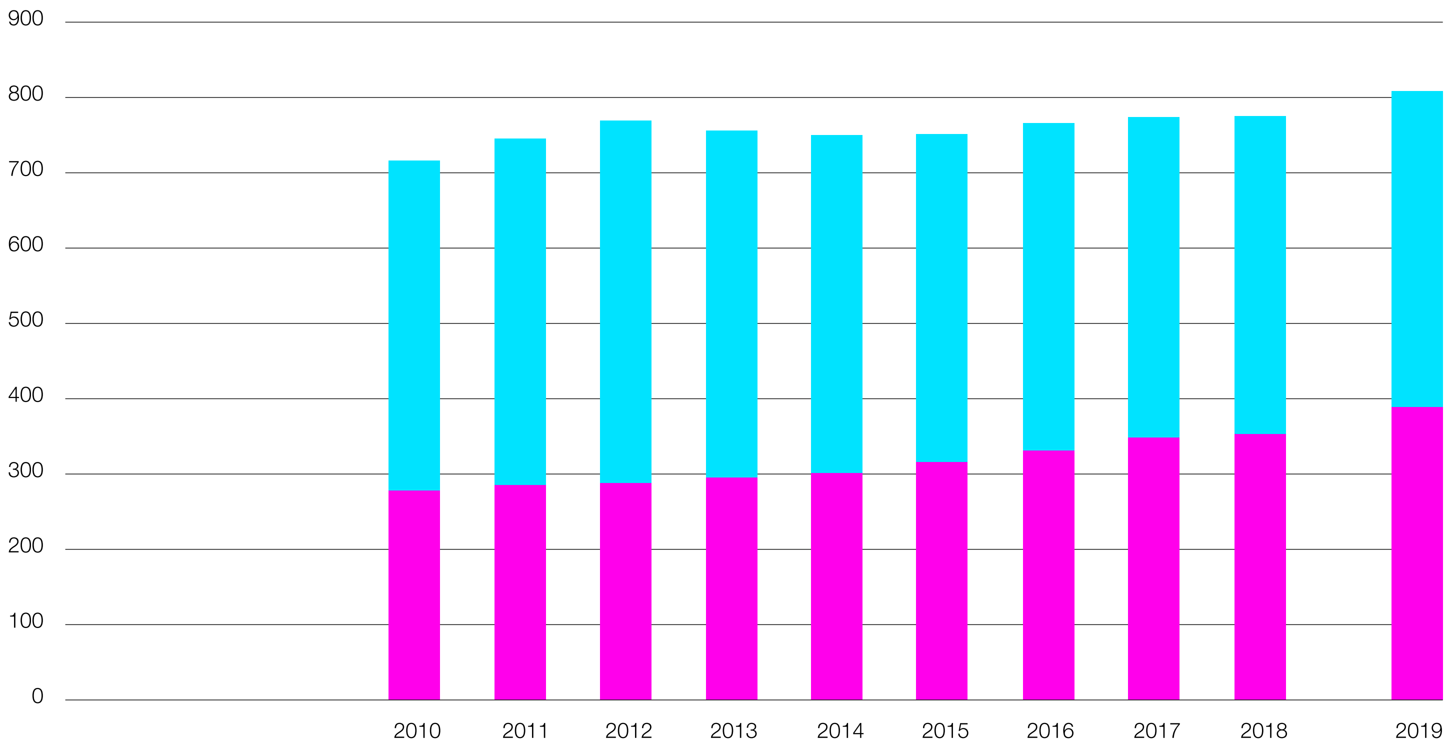
EXHIBITION

UK CINEMA SITES

Figure 1 shows the number of cinema sites in the UK from 2010 to 2019. (It should be noted that due to a change in data supply, the figures for 2019 are not historically comparable as these were calculated on the basis of a different methodology.)

The chart shows an overall increase in provision between 2010 and 2018. It also shows a change in the make-up of sites over that period. The number of cinema sites increased from 716 in 2010 to 775 in 2018, while the share of traditional and mixed-use sites declined from 61% in 2010 to 54.5% in 2018. (Mixed-use cinemas are used for film screenings only part of the time.) In 2019, there were 808 cinema sites in the UK, 419 (52%) of which were traditional and mixed-use venues.

Figure 1 UK cinema sites by type of site, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Traditional and mixed-use	438	460	481	461	449	435	435	426	422	419
Multiplex	278	285	288	295	301	316	331	348	353	389
Total sites	716	745	769	756	750	751	766	774	775	808
% multiplex sites	38.8	38.3	37.5	39.0	40.1	42.1	43.2	45.0	45.5	48.1

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

Notes:

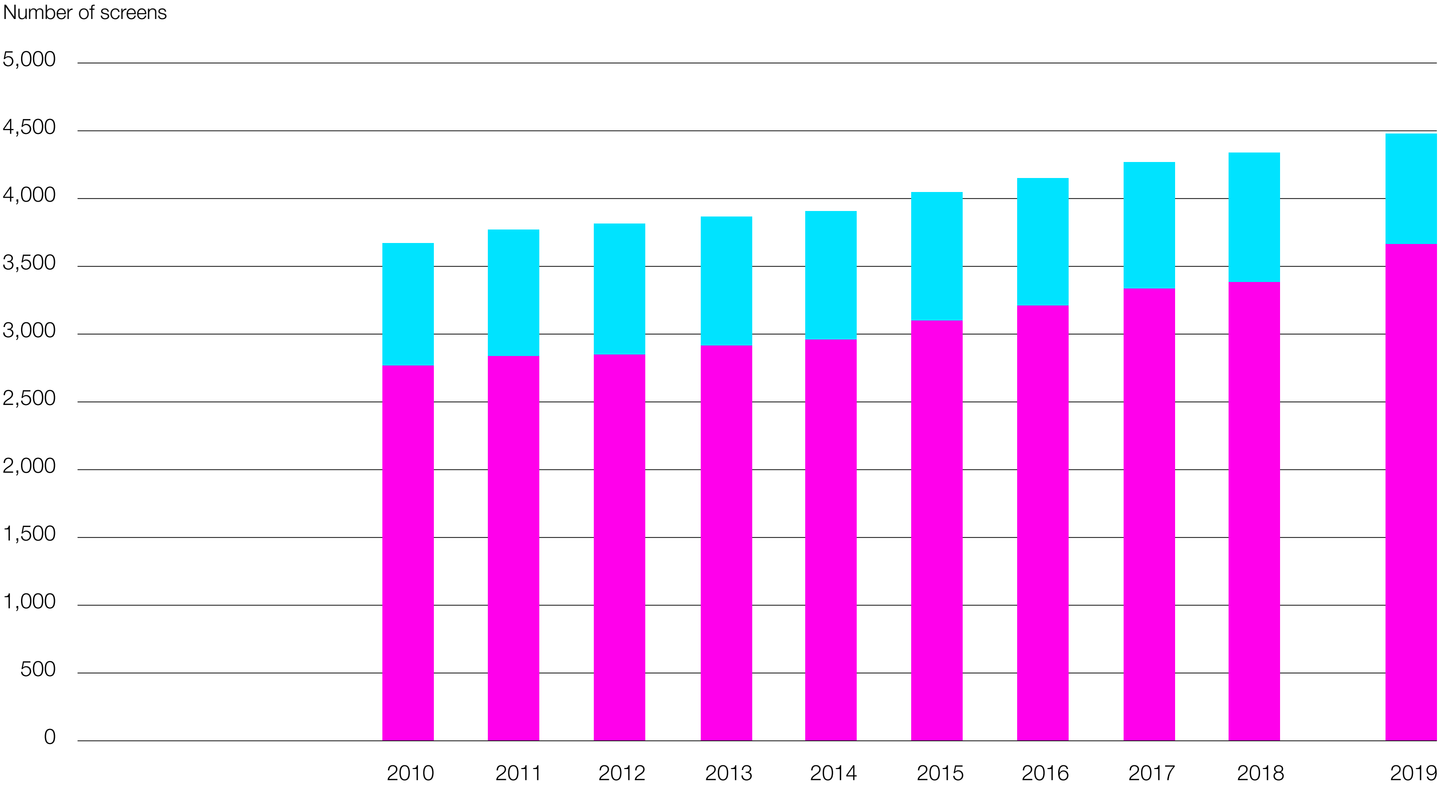
The data for 2019 are not historically comparable as these were calculated on the basis of a different methodology. For 2010-2018, multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites. For 2019, multiplexes are defined as any cinema with 5 or more screens.

Mixed-use cinemas are used for screenings only part of the time.

UK SCREENS

As Figure 2 shows, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) increased every year between 2010 and 2018, due primarily to an increase in multiplex provision. Although not directly comparable with these data, the figures for 2019 would suggest this trend is ongoing. In 2019, the total number of screens stood at 4,480, 82% of which were multiplex screens.

Figure 2 UK cinema screens by type of cinema, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Traditional and mixed-use	904	934	966	952	950	950	941	930	956	814
Multiplex	2,767	2,833	2,851	2,915	2,959	3,096	3,209	3,334	3,384	3,666
Total screens	3,671	3,767	3,817	3,867	3,909	4,046	4,150	4,264	4,340	4,480
% multiplex screens	75.4	75.2	74.7	75.4	75.7	76.5	77.3	78.2	78.0	81.8

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

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. According to Omdia, in 2019, screen density in the UK was 6.8 screens per 100,000 people. This level of access to screens falls short of the numbers in other major film territories: USA (12.4), France (9.3), Australia (9.2), Spain (7.7) and Italy (6.9). Germany's screen density, at 5.4 screens per 100,000 people, remained lower than the UK's.

For the fourth consecutive year, the world's fastest expanding territory, China, gained an additional 10,000 cinema screens, which increased its number of screens per 100,000 people from 4.3 in 2018 to 4.9.

Table 1 shows the level of admissions per head of population in a number of major film territories. The UK saw more admissions per capita (2.6) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the selected territories, the USA (3.5) and Australia (3.4) had the highest admissions per head of population.

Table 1 Admissions per head of population in selected major film territories, 2010-2019 (ranked by 2019 admissions)

	USA	Australia	France	UK	Spain	Italy	Germany
2010	4.0	4.2	3.3	**2.7**	2.2	1.8	1.6
2011	3.8	3.8	3.4	**2.7**	2.1	1.7	1.6
2012	3.9	3.8	3.2	**2.7**	2.0	1.5	1.7
2013	3.8	3.5	3.0	**2.6**	1.7	1.6	1.6
2014	3.6	3.3	3.2	**2.4**	1.9	1.5	1.5
2015	3.8	3.8	3.1	**2.6**	2.0	1.7	1.7
2016	3.8	3.8	3.2	**2.6**	2.2	1.8	1.5
2017	3.5	3.5	3.2	**2.6**	2.2	1.6	1.5
2018	3.7	3.6	3.0	**2.7**	2.1	1.4	1.3
2019	3.5	3.4	3.2	**2.6**	2.3	1.6	1.4

Source: Omdia

Note: Data updated since publication of the 2019 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 7.4 screens per 100,000 people, was lower than that of Northern Ireland (11.3), Central Scotland (7.7) and the Midlands (7.6). The South and South East had the lowest screen density (5.2) of all the ISBA regions followed by the West (5.3) and Border (5.5).

The average cost of a cinema ticket in the UK in 2019 was £7.12, down from £7.21 in 2018. This is the second consecutive year to see a decrease in the average ticket price. The UK Cinema Association, which represents the interests of the majority of UK cinema operators, partially attributed these decreases to ‘tactical discounting’, which is seen in areas with strong local competition among exhibitors, as well as the impact of nationwide discount schemes such as Meerkat Movies, Cineworld Unlimited and Odeon Limitless. Table 2 does, however, highlight the wide variation in ticket prices across the country, with an average ticket in London (£8.64) being over 60% more expensive than in Northern Ireland (£5.29).

Table 2 Screens and admissions by ISBA TV region, 2019 (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	11.3	214	4.8	31	1.9	5.6	26,168	2.9	5.29
Central Scotland	7.7	291	6.5	40	3.8	11.3	38,832	3.0	6.78
Midlands	7.6	664	14.8	117	8.8	21.0	31,627	2.4	7.04
London	7.4	985	22.0	169	13.4	40.2	40,812	3.0	8.64
North West	6.9	487	10.9	71	7.1	18.1	37,166	2.5	6.53
Wales	6.5	201	4.5	49	3.1	7.6	37,811	2.4	5.68
South West	6.4	116	2.6	36	1.8	4.4	37,931	2.5	5.90
North East	6.4	173	3.9	31	2.7	7.0	40,462	2.6	6.31
Northern Scotland	6.4	83	1.9	21	1.3	3.3	39,759	2.5	6.45
Yorkshire	6.2	394	8.8	62	6.4	15.4	39,086	2.4	6.55
East of England	5.8	282	6.3	52	4.9	14.1	50,000	2.9	7.16
Border	5.5	33	0.7	15	0.6	1.1	33,333	1.9	6.53
West	5.3	165	3.7	32	3.1	5.8	35,152	1.9	6.88
South and South East	5.2	392	8.8	82	7.5	21.0	53,571	2.8	7.11
Total	**6.8**	**4,480**	**100.0**	**808**	**66.4**	**176.1**	**39,308**	**2.7**	**7.12**

Source: BFI, Comscore, Cinema Theatre Association, Dodona Research, BARB, Cinema Advertising Association (CAA)

Notes:

* The population totals in Tables 2 and 3 are both 2019 estimates but differ slightly due to the difference in regional estimates.

Average ticket prices for the UK as a whole are calculated by dividing the UK-only box office gross by total UK admissions. In 2019, the box office gross was £1.254 billion and admissions were 176.1 million.

Figures may not sum to totals due to rounding.

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 highest number of screens per 100,000 people in 2019 (11.5), followed by London (7.7) and Wales (7.5). The East Midlands had the fewest screens per 100,000 people at 5.3, followed by the North East and East of England at 6.1.

Table 3 Screens and population in the nations and regions, 2019 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (million)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	214	4.8	31	1.9	11.5	6.9
London	688	15.4	120	8.9	7.7	5.7
Wales	233	5.2	55	3.1	7.5	4.2
Scotland	379	8.5	66	5.4	7.1	5.7
South West	380	8.5	88	5.5	6.9	4.3
North West	480	10.7	73	7.2	6.7	6.6
Yorkshire and The Humber	358	8.0	56	5.4	6.6	6.4
South East	574	12.8	111	9.0	6.4	5.2
West Midlands	366	8.2	62	5.8	6.3	5.9
East of England	377	8.4	68	6.1	6.1	5.5
North East	160	3.6	27	2.6	6.1	5.9
East Midlands	252	5.6	45	4.7	5.3	5.6
England sub-total	3,635	81.1	650	55,2	6.6	5.6
Other	19	0.4	6	n/a	-	-
Total	**4,480**	**100.0**	**808**	**65.6**	**6.8**	**5.6**

Source: BFI, Office for National Statistics (ONS)

Notes:

* See note to Table 3.

n/a = not available.

Figures/percentages may not sum to 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 largest number of multiplex screens (567) in 2019, followed by the South East (463) and the North West (412). Northern Ireland had the highest proportion of multiplex screens (92%) followed by Yorkshire and The Humber (87%), the North West and the North East (both with 86%). In England the lowest concentration of multiplex screens was found in the South West (68%), which had the joint highest number of traditional and mixed-use screens along with London (121). Across the nations, after Northern Ireland, England had the highest proportion of multiplex screens (82%), followed by Wales and Scotland (both with 80%).

Table 4 Cinema screens by type by nation or region, 2019 (ranked by % multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed-use	Total
Northern Ireland	196	91.6	18	214
Yorkshire and The Humber	313	87.4	45	358
North West	412	85.8	68	480
North East	137	85.6	23	160
East Midlands	212	84.1	40	252
West Midlands	306	83.6	60	366
London	567	82.4	121	688
South East	463	80.7	111	574
Wales	187	80.3	46	233
Scotland	303	79.9	76	379
East of England	301	79.8	76	377
South West	259	68.2	121	380
Other	10	52.6	9	19
England sub-total	2,970	81.7	665	3,635
Total	**3,666**	**81.8**	**814**	**4,480**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

MAINSTREAM, SPECIALISED AND ASIAN PROGRAMMING

Dodona Research categorises screens according to whether they show mostly mainstream, specialised (i.e. non-mainstream, including 'arthouse') or Asian films.

Table 5 shows that by far the majority of screens primarily show mainstream films. In 2019, 667 cinemas with 4,146 screens showed mostly mainstream films (83% of sites, 93% of screens). There were 138 sites with 327 screens showing mainly specialised films (17% of sites, 7% of screens) and three cinemas with seven screens dedicated mainly to Asian films (0.4% of sites, 0.2% of screens).

For the fourth consecutive year, the majority of specialised screens (53%) were found in chain cinemas rather than single, independent venues. This is partly a result of recent increases in the number of sites owned by boutique cinema chains such as Everyman, Light Cinemas and Picturehouse (itself owned by Cineworld) which have a broader programming focus than the larger exhibitors.

Table 5 Sites and screens by programme, 2010-2019

Programme	Sites									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Mainstream	550	571	589	586	583	595	604	609	610	667
Specialised	163	171	177	168	165	153	159	162	162	138
Asian*	3	3	3	2	2	3	3	3	3	3
Total	**716**	**745**	**769**	**756**	**750**	**751**	**766**	**774**	**775**	**808**
Programme	**Screens**									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Mainstream	3,416	3,501	3,542	3,598	3,630	3,760	3,844	3,946	3,999	4,146
Specialised	248	259	268	265	275	280	300	312	335	327
Asian*	7	7	7	4	4	6	6	6	6	7
Total	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**	**4,340**	**4,480**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

* Dodona Research renamed this category in 2018; it was previously titled 'South Asian'.

Cinema screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 56% of the UK total in 2019 (Table 6). Yorkshire and The Humber had 27 screens (8% of all specialised screens) whilst Scotland and the East of England both had 23 (7%). Northern Ireland (0.6%), the North East (1.5%) and Wales (2.1%) had the smallest shares of specialised screens.

The seven screens showing Asian films were found in only three cinemas; two in London and the other in Leicester in the East Midlands.

Table 6 Geographical spread of specialised screens, 2019

Nation/region	Number of specialised screens	% of specialised screens
London	130	39.8
South East	52	15.9
Yorkshire and The Humber	27	8.3
Scotland	23	7.0
East of England	23	7.0
North West	20	6.1
South West	16	4.9
East Midlands	12	3.7
West Midlands	10	3.1
Wales	7	2.1
North East	5	1.5
Northern Ireland	2	0.6
Other	0	-
England sub-total	295	90.2
Total	**327**	**100.0**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

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

EXHIBITORS

The UK exhibition sector is made up of a small number of larger exhibitors which own and operate the majority of sites and screens and a large number of smaller companies with one or two sites and screens. At the end of 2019, 16 exhibitors (5% of all exhibitors) owned or programmed 20 or more screens in the UK (Table 7). The three largest exhibitors owned 38% of all UK cinemas and 63% of UK screens.

Table 7 Cinema screens by exhibitors with 20 or more screens, 2019

Exhibitor	Sites	Screens	% of total screens
Cineworld	102	1,060	23.7
Odeon	112	919	20.5
Vue	90	862	19.2
Showcase Cinemas	21	275	6.1
Empire Cinemas	18	132	2.9
Omniplex	15	114	2.5
Everyman	29	91	2.0
Picturehouse (Cineworld)	26	89	2.0
Light Cinemas	11	78	1.7
Reel Cinemas	13	60	1.3
Curzon Cinemas	18	54	1.2
Merlin Cinemas	15	41	0.9
Movie House Cinemas	6	39	0.9
Irish Multiplex Cinemas	5	33	0.7
Savoy Cinemas	8	30	0.7
Parkway Entertainment	4	20	0.4
Others (19 major exhibitors and 264 independent single venue exhibitors)	315	583	13.0
Total	**808**	**4,480**	**100.0**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

Notes:

Figures correct as at December 2019.

Percentages may not sum to 100 due to rounding.

Cineworld was formed in 1995 and acquired the former Cine-UK and UGC chains in 2004. It also acquired Picturehouse in 2012.

Odeon was bought by US cinema chain AMC Entertainment in 2016. It was previously owned by Terra Firma Capital Partners, a European private equity firm.

Vue, which acquired Warner Village cinemas in 2003 and the Apollo cinema chain in 2012, was sold to Canadian investors Omers Private Equity and Alberta Investment Management in 2013.

Showcase Cinemas is owned by National Amusements which in turn is owned by the family of the late Sumner Redstone, former chairman of US media giant Viacom.

Empire Cinemas is owned by Irish entrepreneur Thomas Anderson. It emerged as a buyer of sites from UCI and Odeon in 2005 and UGC and Cineworld in 2006, which were divested as a result of the companies' mergers.

Omniplex Cinemas is owned by the Anderson family. It has a dominant position in Ireland, operating 48% of cinemas and 53% of screens across the Republic of Ireland and Northern Ireland.

EXHIBITOR REVENUES

As Table 8 shows, the top nine exhibitors had an 81% share of overall box office receipts in the UK and Republic of Ireland in 2019; 65% of the box office was shared between the top three exhibitors.

We estimate that exhibitors' revenues from refreshment sales in 2019 totalled £537 million, down 2% compared with 2018 (£549 million). The average spend on refreshments per individual visit was £3.10, the same as in 2018.

Table 8 Exhibitor share of box office in the UK and Republic of Ireland, 2019

Exhibitor	Market share (%)	Box office gross* (£ million)
Cineworld	23.0	311.9
Odeon	21.9	296.8
Vue	20.0	271.0
Showcase Cinemas	6.0	81.9
Everyman	3.1	41.8
Empire Cinemas	2.4	32.0
Picturehouse (Cineworld)	2.2	30.5
Light Cinemas	1.6	21.2
Curzon Cinemas	1.0	14.0
Sub-total	81.1	1,101.3
Other	18.9	256.1
Total	**100.0**	**1,357.4**

Source: Comscore

Notes:

* Box office gross is for all films and event cinema screenings shown in cinemas in 2019. This includes titles first released in 2018.

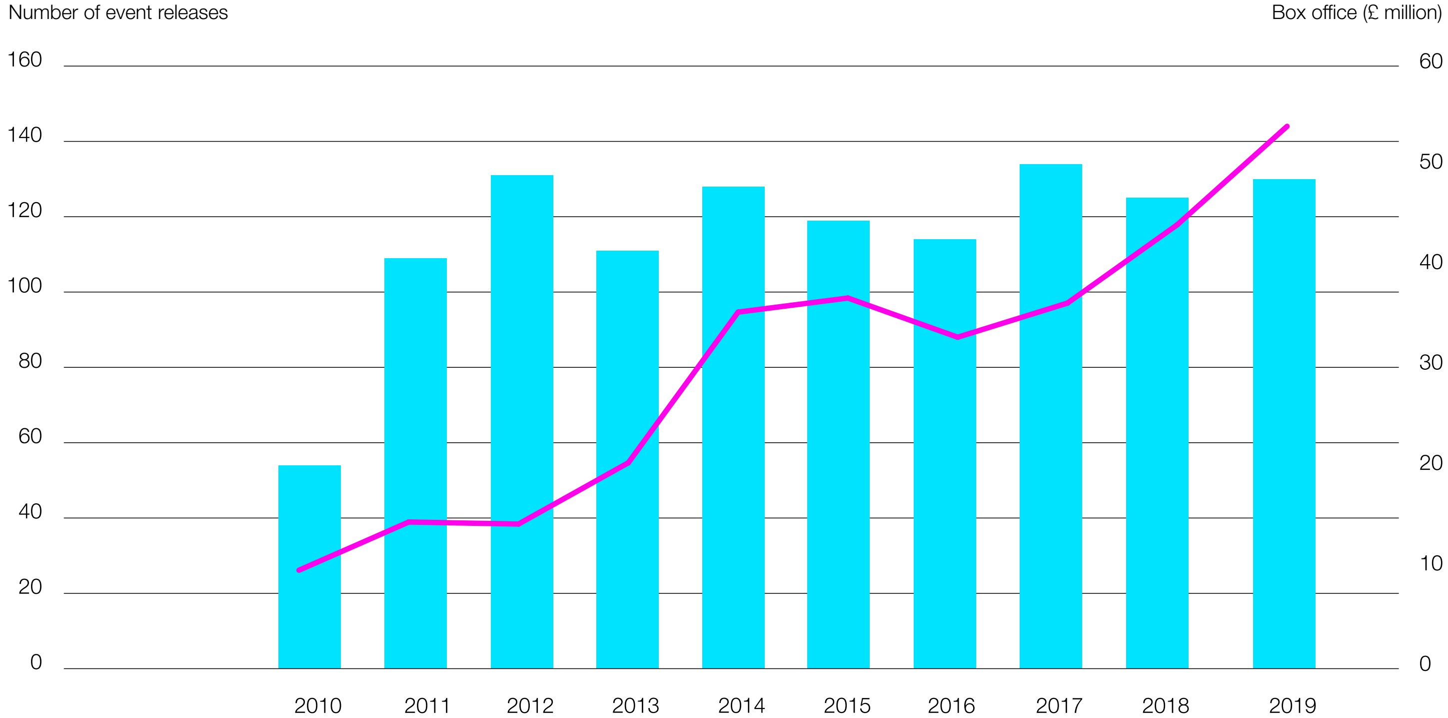
Figures/percentages may not sum to totals/sub-totals due to rounding.

EVENT CINEMA

Event cinema, alternative content or non-feature film programming has provided a growing revenue stream for the exhibition sector in the past decade. Event cinema screenings have potentially improved the use of auditorium capacity during typically quiet periods and, as 'events' are usually shown only once or twice (often as a simultaneous screening of a live performance and a subsequent catch-up screening), can often generate higher occupancy rates than feature films. Event cinema screenings also tend to have higher ticket prices than standard film screenings. This is particularly the case with the immersive cinema screenings offered by London-based Secret Cinema, whose 2019 ticket prices ranged from £49 to £175.

As Figure 3 show, the annual box office earnings generated by event cinema releases in the UK and Republic of Ireland increased by 560% over the past decade, rising from £8 million in 2010 to £52 million in 2019. There has also been an overall upward trend in the volume of releases, which increased by 140% between 2010 and 2019.

Figure 3 Volume and value of event cinema releases in the UK and Republic of Ireland, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of event releases	54	109	131	111	128	119	114	134	125	130
Box office (£ million)	7.9	12.7	12.5	18.6	33.6	35.0	31.1	34.5	42.3	52.1

Source: comScore

Note: Figures include Secret Cinema screenings.

As Table 9 shows, 130 individual events, the majority of which were live, were screened (at least once) in 2019. The box office generated by these screenings (£52 million) set a new all-time record for the event cinema sector. Opera had the greatest number of releases with screenings of 27 different productions (21% of all events), while screenings of theatre performances generated the highest earnings (£20 million), a 38% share of the total box office.

Table 9 Volume and value of event cinema releases in the UK and Republic of Ireland by type of event, 2019 (ranked by gross box office)

Type of event	Number of events	% of events	Gross box office (£ million)	% of gross box office
Theatre	23	17.7	19.6	37.6
Film	3	2.3	8.7	16.7
Popular music concert	26	20.0	6.7	12.9
Ballet	24	18.5	5.5	10.5
Opera	27	20.8	5.3	10.1
Classical music concert	5	3.8	4.0	7.7
TV	2	1.5	0.8	1.6
Children's TV special	8	6.2	0.7	1.3
Exhibition	6	4.6	0.5	1.0
E-Sports	5	3.8	0.3	0.7
Sport	1	0.8	<0.1	<0.1
Total	**130**	**100.0**	**52.1**	**100.0**

Source: Comscore

See note to Figure 3.

Percentages/figures may not sum to totals due to rounding.

Image: *Casino Royale*

TOP 10 EVENT CINEMA RELEASES 2019

The Secret Cinema screening of 2006's *Casino Royale* was the highest grossing event cinema release at the UK and Republic of Ireland box office in 2019 with earnings of £8.4 million (Table 10). Daniel Craig's first outing as James Bond became the UK's all-time highest earning event cinema release, surpassing the 2015 Secret Cinema release of *Star Wars IV: The Empire Strikes Back* (£6.3 million). Also record-breaking was the second highest grossing event release of 2019. With earnings of £4.3 million, the National Theatre's release of Phoebe Waller-Bridge's one-woman show *Fleabag*, became the new all-time top grossing non-Secret Cinema event release in the UK and Republic of Ireland, overtaking 2015's release of the National Theatre's production of *Hamlet* (£3.4 million). The 2019 list is dominated by theatre productions, with six of the top 10 events being screenings of plays or musicals.

Table 10 Top 10 event cinema releases in the UK and Republic of Ireland, 2019

Rank	Title	Type of event	Country of origin	Distributor	Number of cinemas at widest point of release	Gross box office (£ million)
1	Casino Royale (Secret Cinema)	Film	UK/USA/Cze	Secret Cinema	1	8.4
2	Fleabag - NT Live 2019	Theatre	UK	NT Live	628	4.3
3	Les Misérables: The Staged Concert	Theatre	UK	Universal	595	3.3
4	Take That - Greatest Hits Live	Popular music concert	UK	CinemaLive	627	2.1
5	Andre Rieu 2019 New Year Concert from Sydney	Classical music concert	Aus/Nld	Piece of Magic	601	1.9
6	Andre Rieu 2019 Maastricht Concert - Shall We Dance?	Classical music concert	Nld	Piece of Magic	647	1.8
7	42nd Street - The Musical	Theatre	UK	More2Screen	602	1.4
8	One Man, Two Guvnors - NT Live 2019 Encore	Theatre	UK	NT Live	579	1.3
9	Present Laughter - NT Live 2019	Theatre	UK	NT Live	585	1.2
10	All About Eve - NT Live 2019	Theatre	UK	NT Live	567	1.2

Source: Comscore

FILM ON PHYSICAL VIDEO

FACTS IN FOCUS

Despite increasing competition from digital video and a decade plus of falling revenues, physical video remains an important element of the film value chain, illustrating that there is still an audience for film that appreciates physical ownership. In 2019, feature film physical video sales and rentals in the UK generated £370 million.

- The value of sales for all categories of video on physical media in 2019 was just under £477 million; sales of feature film on video accounted for £347 million.
- There were 48 million sales of all categories of video on physical media, with feature film accounting for 39 million sales.
- Film accounted for 81% of the volume of the physical sell-through market and 73% of the value. UK films accounted for over one third (37%) of all films sold on video.
- The most popular purchase on physical video in 2019 was *Bohemian Rhapsody*; the most popular genre was action/adventure.
- The value of the physical video rental market for film in 2019 was £23 million, with online rental (with postal delivery) accounting for 82% of all feature film rental transactions.

Cover image: *Liam Gallagher: As It Was*
courtesy of Altitude Distribution

FILM ON PHYSICAL VIDEO

FILM IN THE PHYSICAL VIDEO RETAIL MARKET

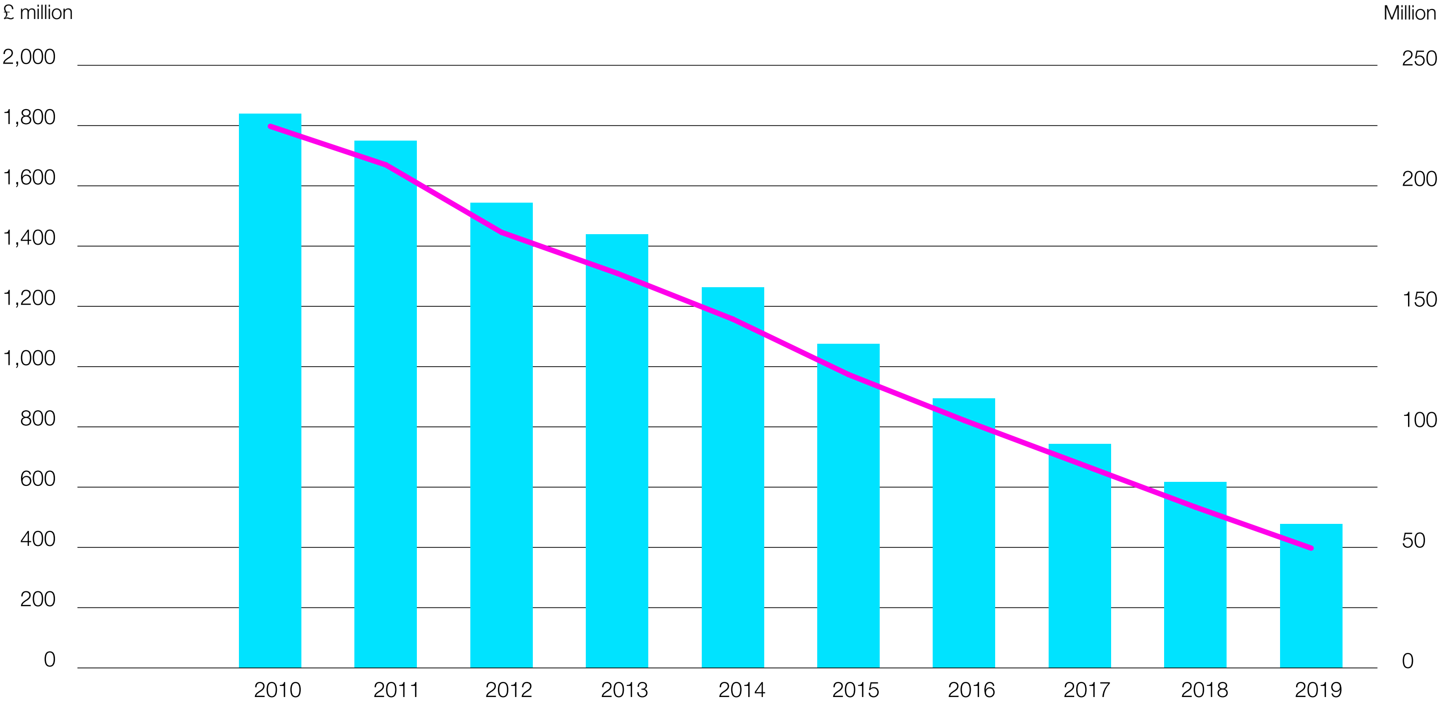
‘Video’ is used in this section as the generic description of all physical video, including DVD, Blu-ray and other physical formats, in line with the definition used by BASE, the British Association for Screen Entertainment; it does not include downloads which are discussed in the Film on digital video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

As Figure 1 shows, both the value and volume of physical video sales in all categories in the UK have declined each year between 2010 and 2019. (This trend has been ongoing since the peak in video sales in 2004 when 234 million units were bought by consumers with a value of £2.5 billion.) The value of physical video sales in the UK decreased by 74% over the decade, while the volume of sales decreased by 78%.

In 2019, 48 million videos were sold in the UK (down 26% compared with 2018) with a total market value of £477 million (down 23% compared with 2018). DVDs accounted for the majority of video sales (73% by value and 81% by volume), while Blu-ray disc purchases accounted for 27% of sales by value and 19% of sales by volume. (The share of the retail video market generated by Blu-ray sales, by both value and volume, has increased year on year since the format’s introduction in 2006.)

Feature film represented approximately 73% of the physical sell-through market by value (£347 million) and 81% by volume (39 million units) in 2019. UK films accounted for around 40% of sales by value (an increase from 35% in 2018) and 37% of sales by volume (a decrease from 39% in 2018).

Figure 1 Retail video sales (all categories), 2010-2019

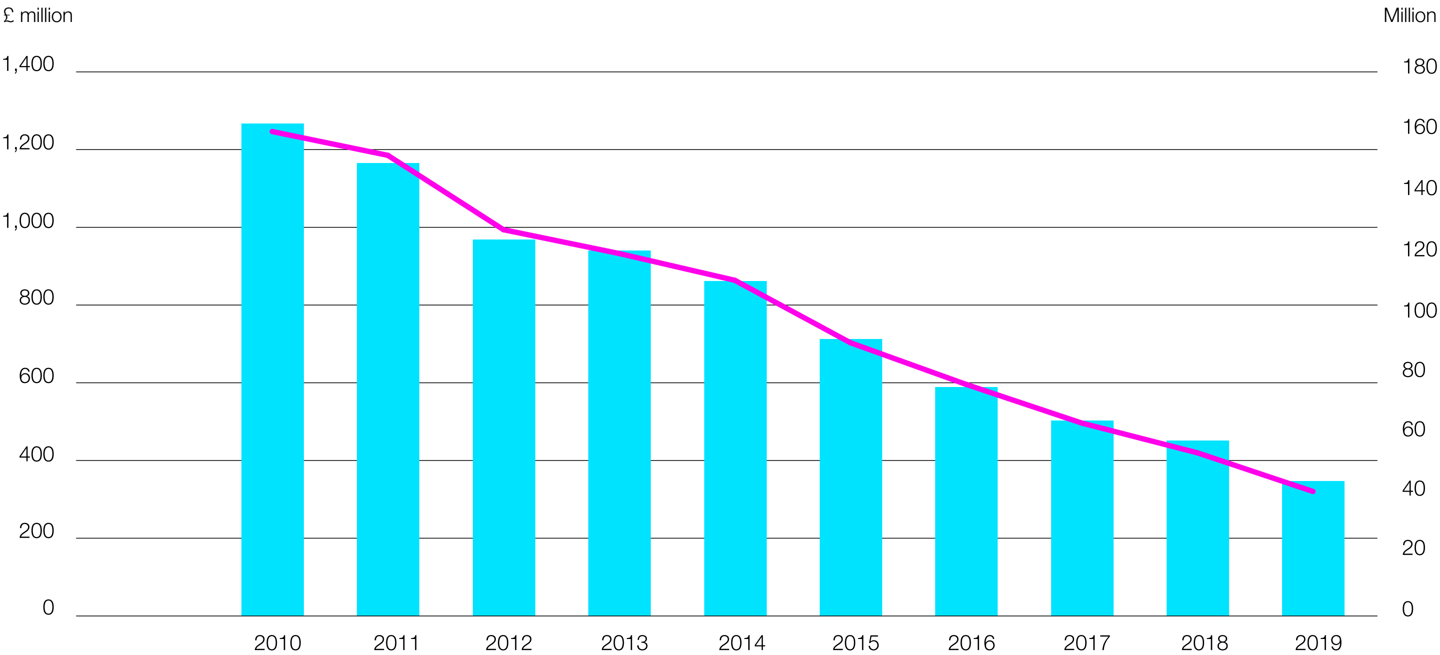


	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Value (£ million)	1,839	1,749	1,543	1,439	1,263	1,075	894	743	617	477
Volume (million)	223	207	179	162	143	120	101	83	65	48

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

As Figure 2 shows, the trend for sales of film on physical video between 2010 and 2019 has mirrored that of the overall physical sell-through market (Figure 2). The value of the retail market for film on physical video in the UK decreased by 73% over the decade, while the volume of sales decreased by 76%.

Figure 2 Film on physical video retail sales, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Value (£ million)	1,267	1,165	968	940	861	712	589	503	451	347
Volume (million)	160	152	127	119	110	89	75	62	52	39

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

Figure 3 shows the average unit price for film on physical video formats between 2010 and 2019. There has been on overall upward trend over the decade, with average prices rising from £7.90 in 2010 to £8.85 in 2019. However, when adjusted for inflation, the average unit price looks more consistent over time, falling most years between £8.50 and £9.00 when expressed in 2019 pounds.

Figure 3 Average retail price of film per unit, 2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Price (£)	7.90	7.64	7.62	7.93	7.83	8.36	7.91	8.06	8.60	8.85
Inflation adjusted price (£ 2019)	9.08	8.65	8.52	8.74	8.50	9.03	8.39	8.40	8.78	8.85

Source: BFI RSU analysis of Official Charts Company and BASE data

Notes:

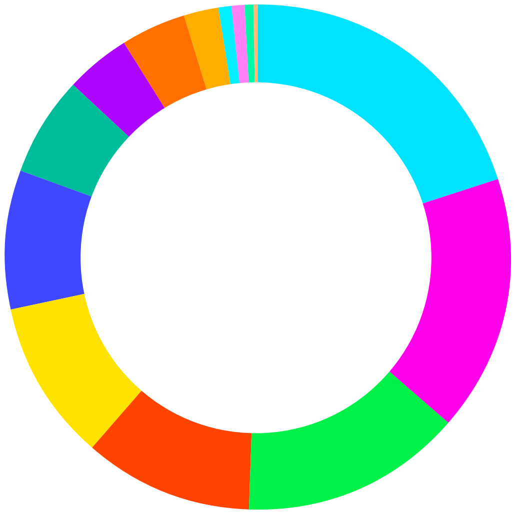
The deflator used to calculate real values is the UK whole economy deflator, which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-sepetember-2020-quarterly-national-accounts.

Inflation adjusted values expressed in constant 2019 pounds.

Figure 4 shows that the most popular genre for film on sell-through video in 2019 was action/adventure, which accounted for 20% of the market (24% in 2018). Drama was the next most popular with 16% of sales, followed by children's animated with 14%. (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 the Top films in 2019 chapter.)

Figure 4 Sales of film on physical video formats by genre, 2019

Genre	%
Action/adventure	20.3
Drama	16.4
Children's animated	14.1
Sci-fi	10.7
Child/family	10.2
Comedy	9.1
Horror	6.4
Thriller	4.1
Musical	4.1
War	2.3
Western	0.8
Documentary	0.7
Anime	0.7
Adult	0.1
Bollywood	<0.1
Other	<0.1



Source: Official Charts Company, BASE

Image: *Avengers: Endgame* © Marvel Studios

TOP FILMS ON PHYSICAL VIDEO

Table 1 shows the top 10 best-selling films on physical video in 2019. The list is headed by *Bohemian Rhapsody*, one of seven titles released at the UK and Republic of Ireland box office in 2018. The remainder of the list is made up of 2019 theatrical releases, including the year's top earning film, *Avengers: Endgame*. There are five UK qualifying films in the list, all of which are US studio-backed productions.

Table 1 Top 10 best-selling films on physical video formats, 2019

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Bohemian Rhapsody	UK/USA	2018	20th Century Fox
2	Avengers: Endgame	UK/USA	2019	Walt Disney
3	A Star Is Born	USA	2018	Warner Bros
4	Fantastic Beasts: The Crimes of Grindelwald	UK/USA	2018	Warner Bros
5	Mary Poppins Returns	UK/USA	2018	Walt Disney
6	Toy Story 4	USA	2019	Walt Disney
7	The Lion King	UK/USA	2019	Walt Disney
8	Aquaman	USA	2018	Warner Bros
9	Captain Marvel	USA	2018	Walt Disney
10	Venom	USA	2018	Sony

Source: Official Charts Company

The top 10 best-selling UK qualifying films on physical video in 2019 include five titles which also appear in the overall top 10 list. The table is headed by the year's overall top-selling film on physical video, *Bohemian Rhapsody*, one of three titles released theatrically in 2018 (Table 2). The seven remaining titles in the list were released theatrically in 2019. All of the top 10 films are studio-backed productions.

Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2019

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Bohemian Rhapsody	UK/USA	2018	20th Century Fox
2	Avengers: Endgame	UK/USA	2019	Walt Disney
3	Fantastic Beasts: The Crimes of Grindelwald	UK/USA	2018	Warner Bros
4	Mary Poppins Returns	UK/USA	2018	Walt Disney
5	The Lion King	UK/USA	2019	Walt Disney
6	Aladdin	UK/USA	2019	Walt Disney
7	Rocketman	UK/USA	2019	Paramount
8	Spider-Man: Far From Home	UK/USA	2019	Sony
9	Dumbo	UK/USA	2019	Walt Disney
10	Fast & Furious: Hobbs & Shaw	UK/USA	2019	Universal

Source: Official Charts Company, BFI RSU

The list of the top 10 best-selling UK independent films on physical video in 2019 is headed by *Stan & Ollie*, which was released theatrically in the same year. In total, seven of the top 10 titles were 2019 theatrical releases, the highest number of any of the main three top 10 lists. The remaining titles were all released theatrically in 2018, including *Darkest Hour*, which appears in the list for the second consecutive year.

Table 3 Top 10 best-selling UK independent films on physical video formats, 2019

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Stan & Ollie	UK/USA/Can#	2019	Entertainment One
2	Fisherman's Friends	UK	2019	Entertainment
3	Angel Has Fallen	UK/USA#	2019	Lionsgate
4	Robin Hood	UK/USA#	2018	Lionsgate
5	Hellboy	UK/USA#	2019	Lionsgate
6	King of Thieves	UK/Fra	2018	StudioCanal
7	The Favourite	UK/USA/Ire#	2019	20th Century Fox
8	Mary Queen of Scots	UK/USA#	2019	Universal
9	Fighting with My Family	UK/USA#	2019	Lionsgate
10	Darkest Hour	UK/USA#	2018	Universal

Source: Official Charts Company, BFI RSU

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

The UK's best-selling documentary feature on physical video in 2019 was Peter Jackson's *They Shall Not Grow Old* (Table 4). A 2019 BAFTA nominee, the film was also the most popular documentary on physical video in 2018, and is one of four titles in the top 10 released theatrically in that year. The remaining films in the top 10 were all 2019 theatrical releases, and include the year's highest grossing documentary at the UK and Republic of Ireland box office, *Apollo 11*.

For the first time, this list now includes concert documentaries. There are two top 10 titles in this category – *Liam Gallagher: As It Was*, a film following the ex-Oasis frontman's 2018 solo tour, and *Western Stars*, a filmed performance of Bruce Springsteen's 2019 album of the same name.

Six of the top 10 films are UK qualifying productions.

Table 4 Top 10 best-selling documentary films on physical video formats, 2019

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	They Shall Not Grow Old	UK/NZ	2018	Warner Bros
2	Apollo 11	USA	2019	Dogwoof
3	Liam Gallagher: As It Was	UK	2019	Altitude/Spirit Entertainment
4	Free Solo	USA	2018	Dogwoof
5	Busby	UK	2019	Altitude/Spirit Entertainment
6	Western Stars	USA	2019	Warner Bros
7	The Edge	UK	2019	Spirit Entertainment
8	Spitfire	UK	2018	Altitude/Spirit Entertainment
9	The Accountant of Auschwitz	Can	2018	Signature Entertainment
10	Diego Maradona	UK	2019	Altitude/Spirit Entertainment

Source: Official Charts Company, BFI RSU

For the second consecutive year, Studio Ghibli titles dominate the list of best-selling foreign language films on physical video. The 2019 top 10 includes seven films produced by the renowned Japanese animation house, the top ranked of which is Hayao Miyazaki's 2003 Oscar® winner *Spirited Away*. (Six of the Studio Ghibli titles were directed by Miyazaki.)

The list features one other Japanese title – Hirokazu Koreeda's 2018 Palme d'Or winner *Shoplifters* – and two European language titles – Pawel Pawlikovski's 2019 Oscar® nominee *Cold War* (in Polish) and Andrei Tarkovsky's final Soviet-era film *Stalker* (in Russian).

Table 5 Top 10 best-selling foreign language films on physical video formats, 2019

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Spirited Away	Jpn	2003	StudioCanal
2	My Neighbour Totoro	Jpn	1989	StudioCanal
3	Princess Mononoke	Jpn	2001	StudioCanal
4	Cold War	Pol/UK/Fra	2018	Curzon Artificial Eye
5	Shoplifters	Jpn	2018	Thunderbird Releasing
6	Kiki's Delivery Service	Jpn	1991	StudioCanal
7	Ponyo	Jpn	2010	StudioCanal
8	Laputa: Castle in the Sky	Jpn	1986	StudioCanal
9	Stalker	USSR	1979	Curzon Artificial Eye
10	Grave of the Fireflies	Jpn	1988	StudioCanal

Source: Official Charts Company, BFI RSU

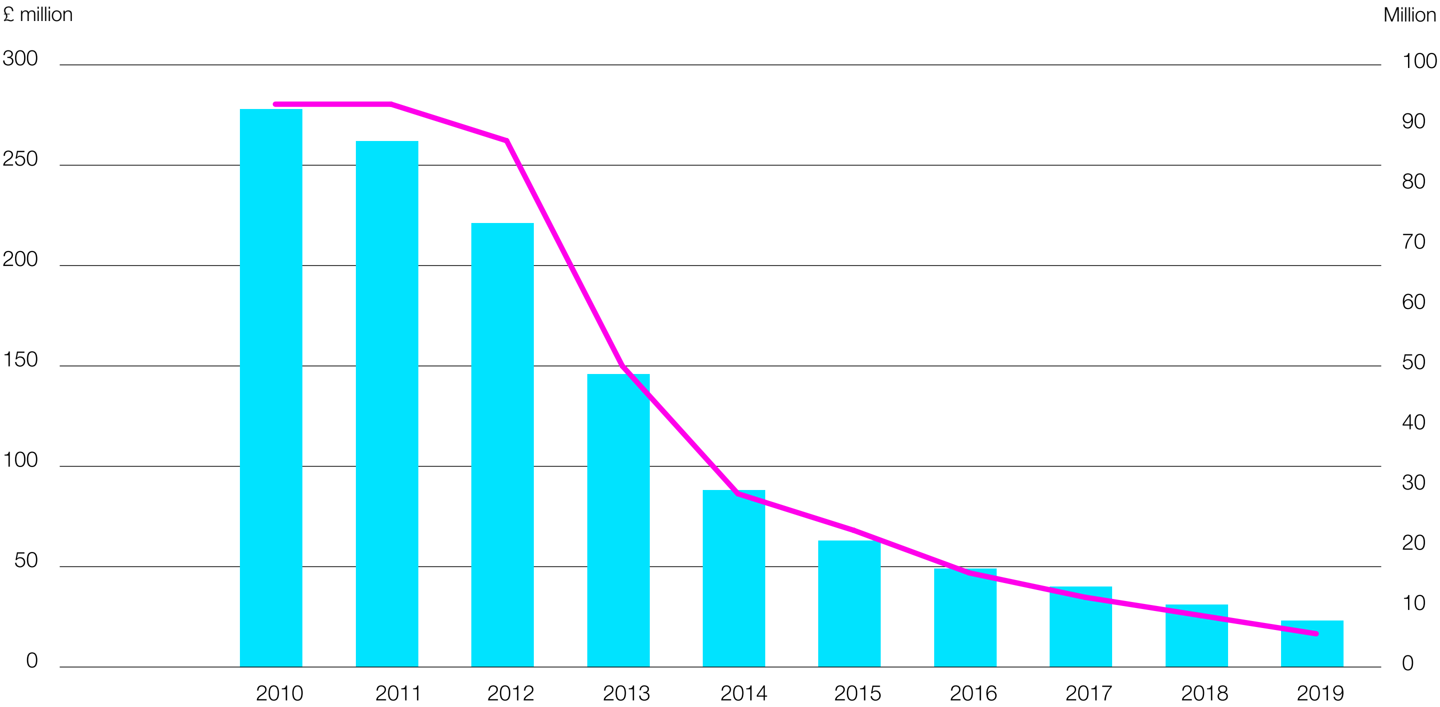
Note: The animated films in this table were all released on physical video with the option to view either with the original Japanese language soundtrack (with English subtitles) or with a dubbed version.

FILM IN THE PHYSICAL VIDEO RENTAL MARKET

At £23 million, revenues from physical video rentals in 2019 represented less than 8% of the market's value in 2010 (£278 million), while the volume of transactions saw a decrease of 94%, from 93 million in 2010 to six million in 2019 (Figure 5).

The average price of a physical video rental in 2019 was £3.86, and online renting of physical discs (with postal delivery) accounted for 82% of rental transactions.

Figure 5 Film on physical video rental market, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Value (£ million)	278	262	221	146	88	63	49	40	31	23
Transactions (million)	93	93	87	50	29	23	16	12	9	6

Source: Omdia

Note: Data for 2010-2018 has been revised since publication of the 2019 Statistical Yearbook.

BFI

FILM ON DIGITAL VIDEO

FACTS IN FOCUS

In 2019, revenues for film on digital video outstripped those of physical video for the third consecutive year. On-demand services represented approximately 27% of the overall value of the UK filmed entertainment market, compared with only 5% in 2010.

- In 2019, the overall digital video market for film in the UK was estimated to be worth £968 million, an increase of 20% compared with 2018.
- Revenues from subscription video on demand (SVoD) services were estimated to have been £692 million, an increase of 34% compared with 2018.
- Revenues from rental and retail (TVoD) services were estimated to have been £276 million, a decrease of 3% compared with 2018.
- Netflix was the most popular provider of on-demand streamed content in the UK in 2019 with 34% of UK adults using the service.
- By the end of 2019, over 14 million UK households had access to one or more SVoD service, a 16% increase compared with 2018.
- The Netflix original production *Bird Box* was the most watched film on a subscription streaming service in 2019.
- In 2019, over half (52%) of the films available on the leading subscription streaming services (Netflix, Amazon Prime Video and NOW TV) were American titles, and 63% of available films had been released between 2010 and 2019.

Cover image: *The Hunger Games: Catching Fire*
courtesy of Lionsgate Films

FILM ON DIGITAL VIDEO

FILM ON DIGITAL VIDEO

Digital video or Video on Demand (VoD) is used in this chapter 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); 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 NOW TV

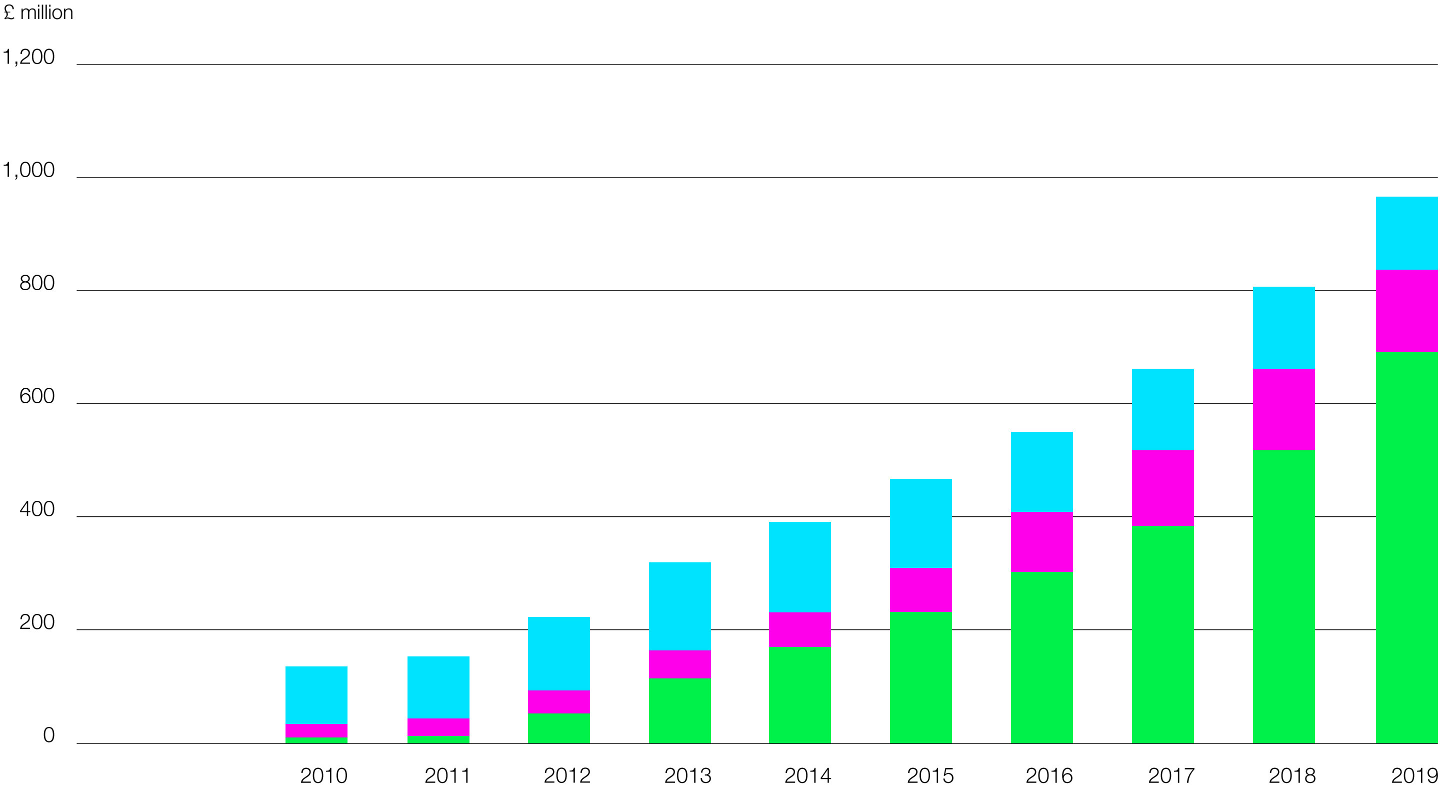
- Free/advert-supported – providers include YouTube (excluding YouTube Premium), Facebook Watch, and catch-up services from the major broadcasters (also known as BVoD) such as BBC iPlayer, ITV Hub (excluding ITV Hub+) and All 4 (excluding All 4+).

FILM IN THE DIGITAL VIDEO MARKET

According to Omdia, the estimated value of the on-demand market for film in the UK in 2019 was £968 million, an increase of 20% compared with 2018, and more than seven times its value in 2010 (Figure 1).

Much of the recent growth in the market is attributable to a rise in the use of subscription streaming services. Revenues from SVoD platforms are estimated to have been £692 million in 2019, an increase of 34% compared with 2018 (£518 million). The value of overall transactional digital revenues, however, decreased for the first time in 2019, falling from £290 million in 2018 to £276 million. This decrease was due solely to a drop in the value of digital video rentals which fell from £145 million in 2018 to £130 million.

Figure 1 Estimated value of the digital video film market in the UK, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
TVoD rental	102	110	130	155	160	158	142	144	145	130
TVoD retail	24	31	41	50	61	78	106	133	145	146
SVoD	10	13	53	115	171	233	303	385	518	692
Total	**136**	**154**	**224**	**320**	**392**	**469**	**551**	**662**	**808**	**968**

Source: Omdia
Notes:

Estimates include both television-based and online digital video revenues.

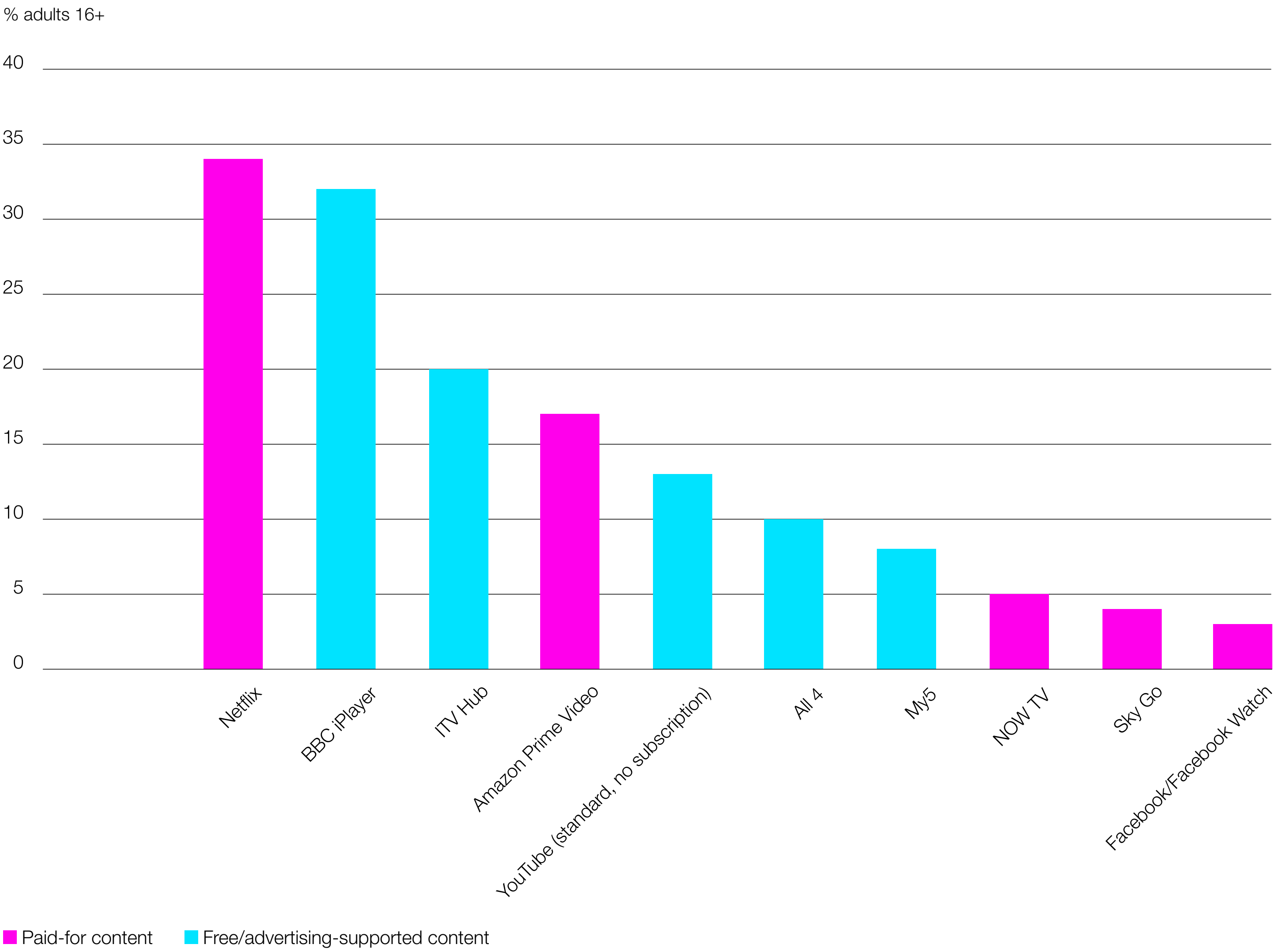
Figures updated since publication of the 2019 Statistical Yearbook.

POPULARITY OF ON-DEMAND STREAMING SERVICES

UK viewers are among 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 2020, 84% of all households in the UK watch VoD at least once a month, compared with 70% in Germany and 67% in France.

Figure 2 shows the top 10 most popular on-demand streaming services (for both film and television programmes) in 2019 amongst UK adults (16+). The top 10 is split evenly between free/advert supported and paid-for services, and features all of the UK-wide broadcaster catch-up services. In 2019, Netflix (used by 34% of adults) became the UK's most popular on-demand streaming service, overtaking BBC iPlayer (32%) for the first time. (BBC iPlayer had been the UK's most popular service every year since its launch in 2007.)

Figure 2 Top 10 most popular on-demand streaming services in the UK, 2019



Adults 16+ (%)	34	32	20	17	13	10	8	5	4	3

Source: Ofcom Technology Tracker 2019

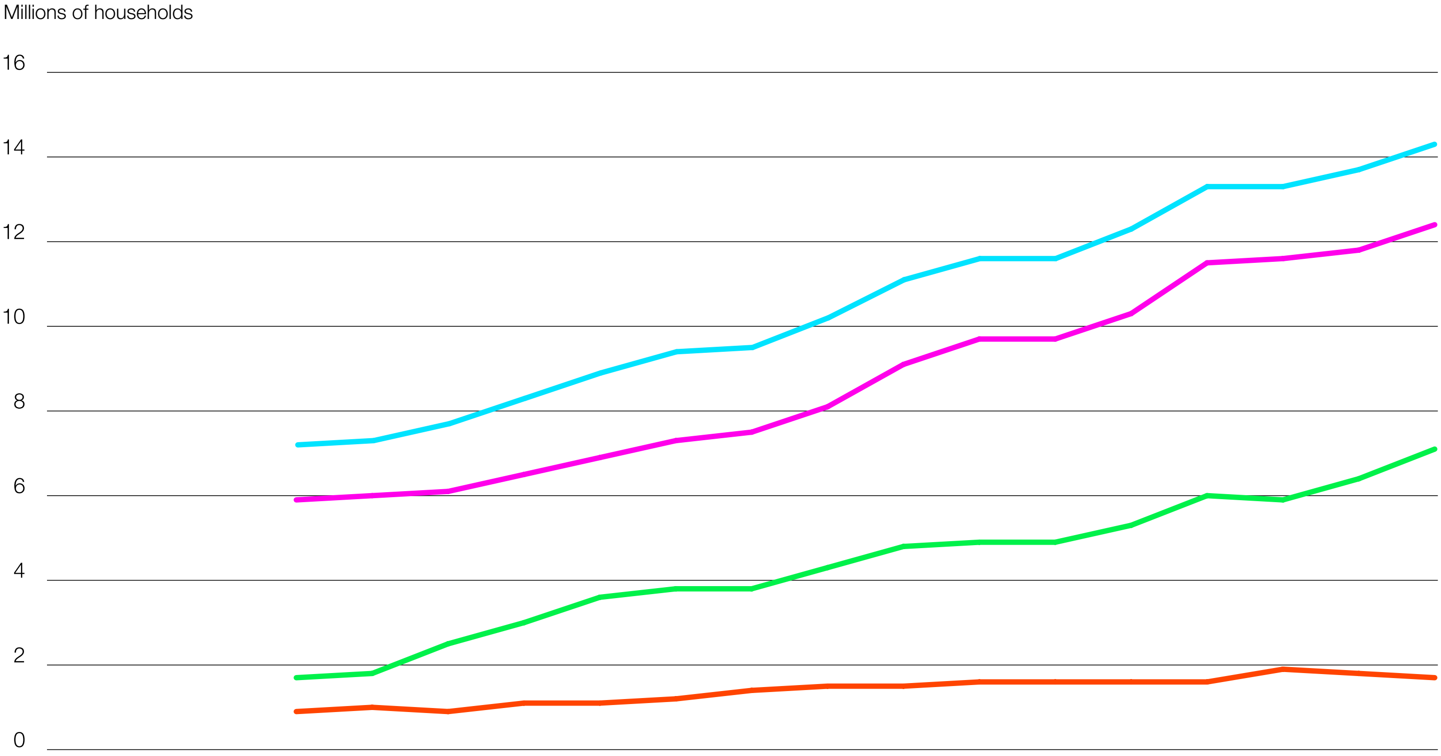
Q: Do you use any of these services to view online TV programmes or films via any type of device (including a mobile phone, tablet or TV set)? n=3,909

THE AUDIENCE FOR SVoD

One of the key drivers of growth in the digital video market in the UK in recent years has been the rapid take-up of OTT SVoD services. As Figure 3 shows, the number of households with access to these services increased from 7.2 million in Q1 2016 to 14.3 million in Q4 2019 (50.5% of total households), due largely to rising subscriber numbers for the three most popular providers: Netflix, Amazon Prime Video and NOW TV (owned and operated by Sky). In Q4 2019, Netflix was available in 12.4 million UK homes, Amazon Prime Video in 7.1 million homes, and NOW TV in 1.7 million homes.

As the overall number of subscriptions to UK SVoD services has increased, so too has the number of households opting to sign up to more than one platform. According to BARB Establishment Survey data, by Q4 2019, 6.0 million households had access to two or more SVoD services, a rise of 40% compared with 4.3 million in Q4 2018. (For more on SVoD audiences, see the Audiences chapter.)

Figure 3 UK SVoD households, Q1 2016 – Q4 2019



	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
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
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
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
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

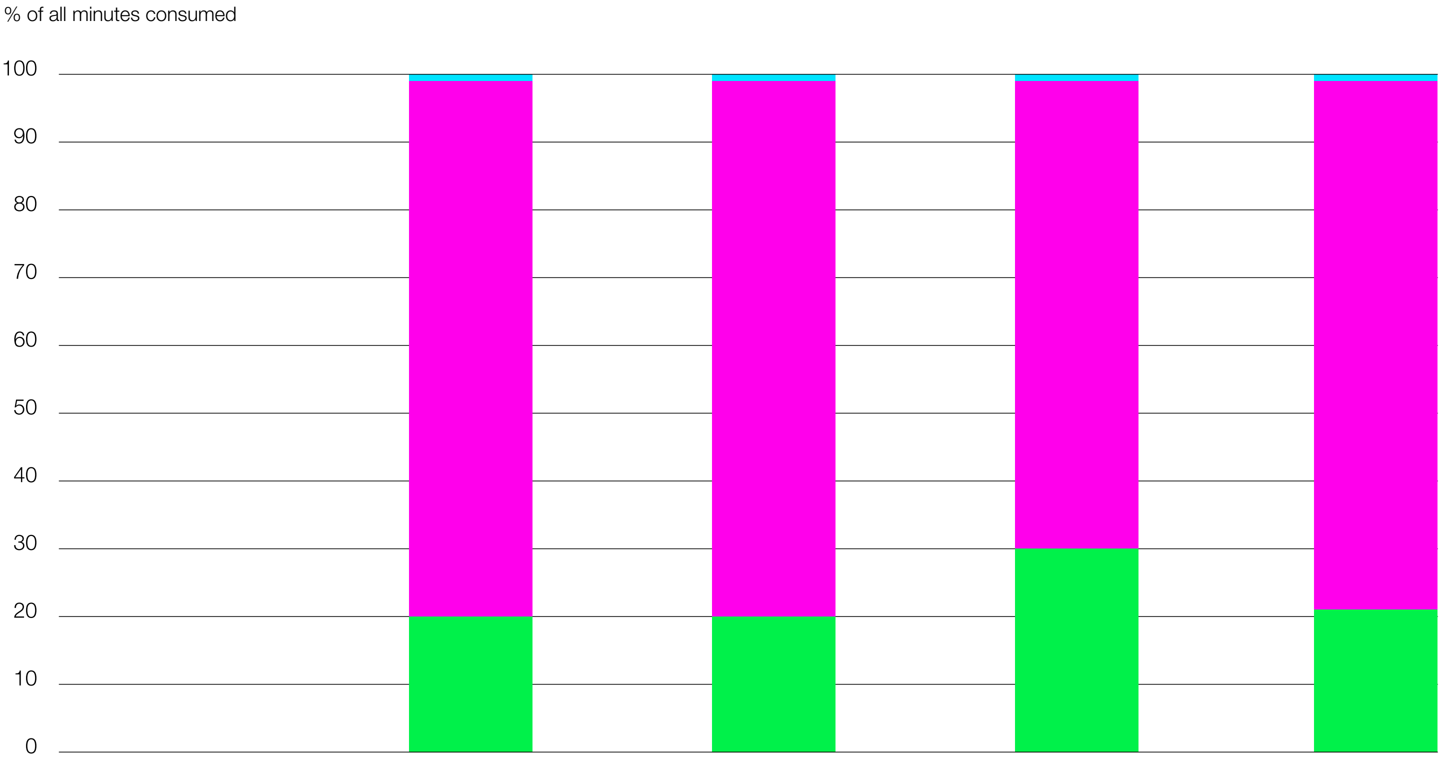
Source: BARB Establishment Survey

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's data, in 2019 feature films represented 61% of available titles on the three leading SVoD platforms (Netflix, Amazon Prime Video and NOW TV) and 28% of available content hours.

Figure 4 shows the share of total viewing time devoted to film vs television programmes on the three leading streaming services by subscribers (adults 18+) to these platforms in 2019. On average, subscribers spent 21% of their viewing time on these services watching films. Amongst the top three providers, NOW TV subscribers spent the largest share of viewing time watching films (30%) whilst both Netflix and Amazon Prime Video subscribers spent 20%.

Figure 4 Share of viewing by content on leading UK SVoD platforms, 2019



	Netflix	Amazon	Now TV	Total
Other TV	1	1	1	1
TV series	79	79	69	78
Film	20	20	30	21

Source: GfK, UK SVoD Tracker, 2019, All adults 18+ who use SVoD platforms at least once every two weeks
Note:'Total' refers to the overall share of viewing on Netflix, Amazon Prime Video and NOW TV.

TOP FILMS ON SVoD 2019

Table 1 lists the top 10 most popular films viewed on the UK's three largest subscription streaming platforms in 2019. 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.

All of the top 10 most popular films on subscription streaming services in 2019 were viewed either primarily or exclusively on Netflix, but several of these titles were viewed on more than one service. The list is headed by *Bird Box*, a Netflix original production, which premiered on the platform in late 2018. Half of the titles in the list are categorised as Netflix originals. (The Netflix classification of originals includes titles commissioned directly by the platform, or those purchased from the Hollywood majors and other producers for exclusive distribution in some or all worldwide territories.) Four of these titles - *Bird Box, Murder Mystery, The Christmas Chronicles* and *El Camino: A Breaking Bad Movie* - were only available to Netflix audiences, while one title - *The Irishman* - also received a limited theatrical release.

The Christmas Chronicles also featured in the 2018 top 10 list, while *Avengers: Age of Ultron* appeared in both the 2017 and 2018 top 10 lists. There are two UK films in the 2019 top 10 list compared with four in 2018.

Table 1 Top 10 films viewed on leading UK SVoD platforms, 2019 (ranked by share of total film minutes consumed)

Rank	Title	Country of origin	Main provider	Year of release in the UK	% of total film minutes consumed
1	Bird Box	USA	Netflix	2018*	2.29
2	The Irishman	USA	Netflix	2019*	1.36
3	Murder Mystery	USA	Netflix	2019*	0.78
4	The Hunger Games: Catching Fire	USA	Netflix	2013	0.66
5	John Wick: Chapter Two	USA	Netflix†#	2017	0.66
6	The Christmas Chronicles	USA	Netflix	2018*	0.62
7	Charlie and the Chocolate Factory	UK/USA	Netflix†	2005	0.58
8	Avengers: Age of Ultron	UK/USA	Netflix	2015	0.55
9	El Camino: A Breaking Bad Movie	USA	Netflix	2019*	0.53
10	Spider-Man: Homecoming	USA	Netflix#	2017	0.49

Source: RSU, GfK, UK SVoD Tracker, Calendar 2019, claimed viewership on Amazon Prime Video, Netflix or NOW TV
Notes:
Percentage of total film minutes is shown to two decimal places to differentiate between titles.
* Film was released directly on the Netflix platform without a prior cinema release, or with a limited cinematic release.
† Film also available on Amazon Prime Video.
# Film also available on NOW TV.

Image: *The Irishman* © Netflix

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 2019. (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 108 different countries.

The USA was the leading country of origin for titles on each of the three platforms and represented 52% of all titles available from these providers. However, the concentration of American titles differed considerably between platforms, making up 43.5% of available Netflix films and 79% of films available on NOW TV. The UK was the second most prevalent country of origin for titles on both Amazon Prime Video (6%) and Now TV (7%) but was third for titles on Netflix (6.5%) for which India was the second most prevalent country of origin, with 19% of available titles. 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, 2019 (ranked by total percentage)

Primary country of origin	Netflix	Amazon Prime Video	Now TV	Total
USA	43.5%	52.3%	79.4%	52.4%
India	18.8%	5.8%	-	8.4%
UK	6.5%	7.2%	7.6%	7.0%
Canada	2.5%	4.0%	2.0%	3.4%
Australia	1.0%	1.7%	1.2%	1.5%
Italy	0.5%	1.8%	0.5%	1.4%
China	3.4%	0.8%	0.4%	1.4%
France	2.2%	1.1%	1.1%	1.4%
Spain	2.8%	0.5%	0.5%	1.1%
Other (including non-assigned)	18.7%	24.7%	7.3%	21.9%

Source: Ampere Analysis, Catalogue audit, December 2019

Notes:

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.

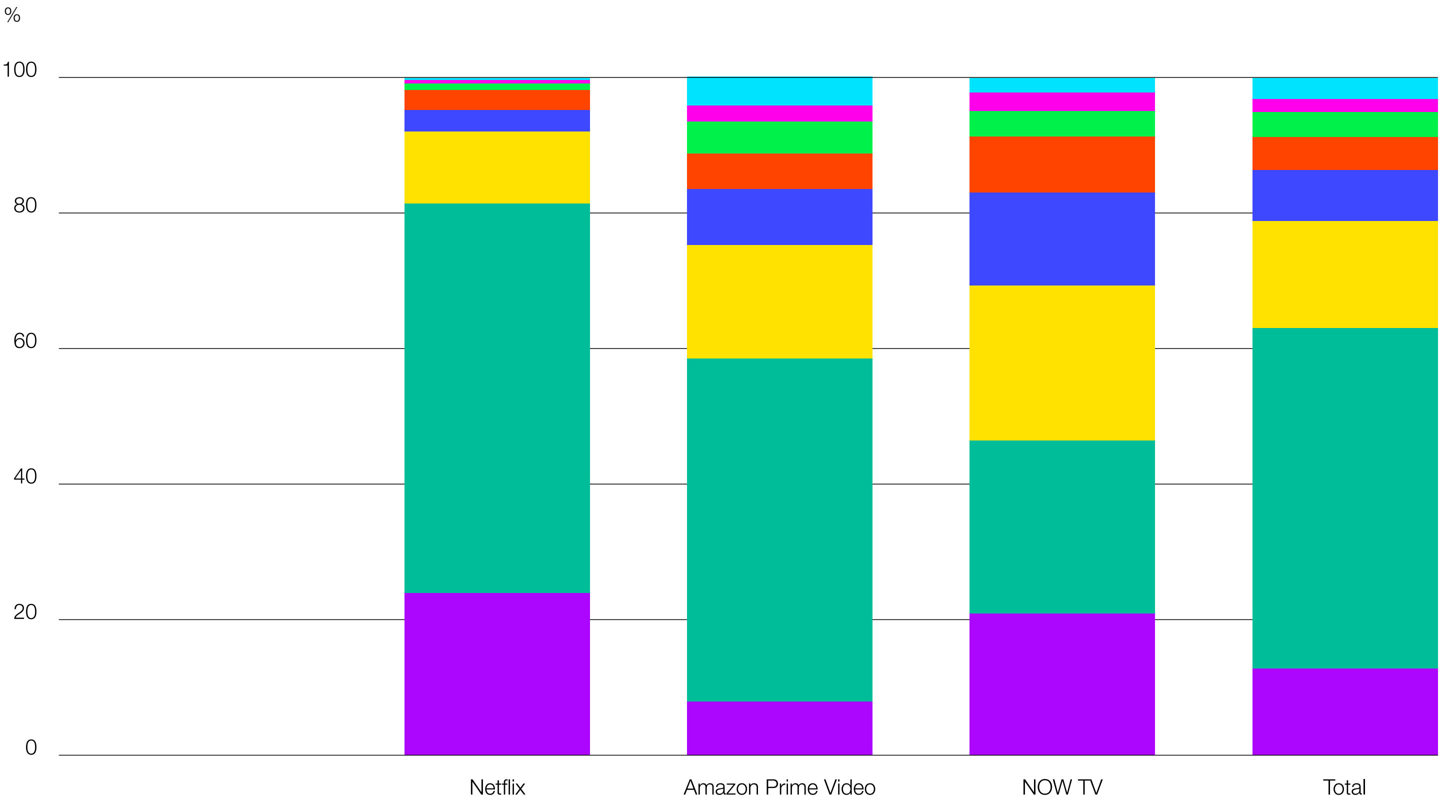
'Feature film' is defined as any film with a running time of 45 minutes or over.

'Total' refers to the overall share of viewing on Netflix, Amazon Prime Video and NOW TV.

AGE OF FEATURE FILM CONTENT ON LEADING SVoD PLATFORMS

Figure 5 shows the distribution of film content by age on the leading SVoD platforms in 2019. Of the three services, Netflix had both the greatest proportion of recent titles (films released on any platform between 2010 and 2019) at 81%, and the greatest proportion of new titles (films released in 2018 or 2019) at 24%. NOW TV had the smallest share of recent titles (46%) while Amazon Prime Video had the smallest share of new titles (8%). It should be noted, however, that Amazon Prime Video had the largest film catalogue of the three providers with over 10,000 titles available in December 2019, compared to just under 4,000 titles for Netflix and under 1,300 for NOW TV, so in terms of volume Amazon Prime Video offered subscribers around three times as many new titles as NOW TV.

Figure 5 Feature film catalogue content by age on leading SVoD platforms, 2019



	Netflix	Amazon Prime Video	NOW TV	Total
1950s and earlier	0.3	4.3	2.1	3.1
1960s	0.5	2.3	2.8	1.9
1970s	1.0	4.7	3.7	3.7
1980s	2.9	5.3	8.3	4.9
1990s	3.2	8.2	13.7	7.5
2000s	10.6	16.8	22.9	15.8
2010-2017	57.5	50.6	25.5	50.2
2018-2019	23.9	7.9	20.9	12.8

Source: Ampere Analysis, Catalogue audit, December 2019

Notes:

Year coding is supplied by Ampere Analysis and may not correspond with other published sources.

'Feature film' is defined as any film with a running time of 45 minutes or over.

'Total' refers to the overall share of viewing on Netflix, Amazon Prime Video and NOW TV.

FILM ON TELEVISION

FACTS IN FOCUS

In terms of audience numbers, television remains the most popular platform for film consumption in the UK. Viewers had a choice of over 7,600 unique films titles across all channels in 2019, and the cumulative film audience was 2.3 billion.

- There were 7,667 unique film titles on television in 2019, including 1,101 on terrestrial channels, 2,015 on pay TV film channels and 5,544 on other multi-channels.
- There were 1,331 film transmissions on terrestrial channels (up from 1,298 in 2018). Of these, 390 were UK films (up from 359 in 2018).
- There were 31,180 film transmissions on multi-channel television and 48,663 film transmissions on pay TV film channels.
- The most popular film on terrestrial television in 2019 was the independent UK production *Paddington 2*, which attracted an audience of 6.3 million viewers on BBC One.
- *Harry Potter and the Deathly Hallows: Part 2* attracted the highest audience for a single transmission on multi-channel television in 2019, with 1.9 million viewers on ITV2.
- *The Grinch* attracted the highest single audience on pay TV film channels, with 1.6 million viewers on Sky Cinema Premiere.
- The estimated value of feature film to UK broadcasters in 2019 was approximately £865 million (down from £896 million in 2018).

Cover image: *Paddington 2* courtesy of StudioCanal

FILM ON TELEVISION

PROGRAMMING ON THE TERRESTRIAL CHANNELS

In 2019, terrestrial television channels accounted for 22% of all viewings of film on television. (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 2019 and the number of UK titles broadcast in that time. UK films are broken down into recent titles (films released theatrically between 2010 and 2019) and older titles (released pre-2010).

There were 1,331 film transmissions on terrestrial television in 2019, up from 1,298 in 2018, an average of over 3.5 films per day. Almost three in 10 (29%) films shown were UK titles. Channel 4 broadcast the greatest number of films overall (411) whilst BBC Two showed the greatest number of UK films overall (162) and the greatest number of recent UK films (72).

In total, the terrestrial channels broadcast 1,101 unique film titles in 2019, a slight increase on the 1,093 unique titles shown in 2018.

Table 1 Feature films broadcast[1] on terrestrial television 2019

	Number of films broadcast	Number of UK films broadcast[1]	UK films as a % of total	Number of recent UK films broadcast[2]	Recent UK films as % of total films broadcast
BBC One	161	72	44.7	57	35.4
BBC Two	332	162	48.8	72	21.7
ITV	151	62	41.1	13	8.6
Channel 4	411	77	18.7	65	15.8
Channel 5	276	17	6.2	5	1.8
Total	**1,331**	**390**	**29.3**	**212**	**15.9**

Source: BARB, BFI RSU analysis

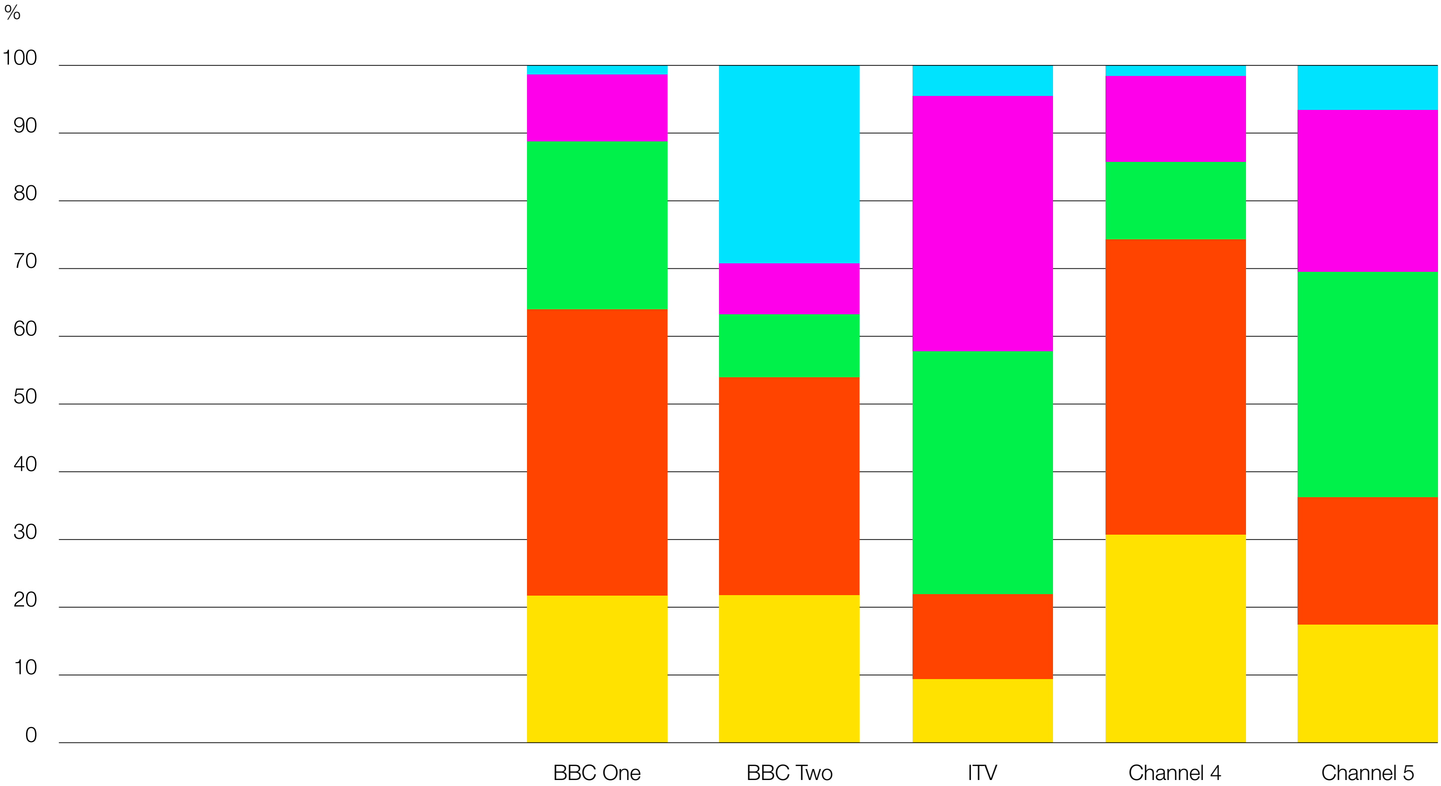
[1] Includes repeat broadcasts of individual titles.

[2] A recent film is one which has been theatrically released, or intended for release, in the UK since 2010.

Figure 1 shows the percentage of films broadcast on the terrestrial channels in 2019 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 for the other terrestrial channels. Just under one third (31%) of the films shown by Channel 4 in 2019 were less than five years old, while 74% of its films were less than 10 years old. In contrast, over 42% of the films shown on ITV had been released theatrically at least 20 years before 2019, while 29% of the films screened on BBC Two had been released at least 50 years before.

Figure 1 Percentage of feature film by age on terrestrial channels, 2019



	BBC One	BBC Two	ITV	Channel 4	Channel 5
50+ years	1.2	29.2	4.6	1.7	6.5
20-49 years	9.9	7.5	37.7	12.7	23.9
10-19 years	24.8	9.3	35.8	11.4	33.3
5-9 years	42.2	32.2	12.6	43.6	18.8
Less than 5 years	21.7	21.7	9.3	30.7	17.4

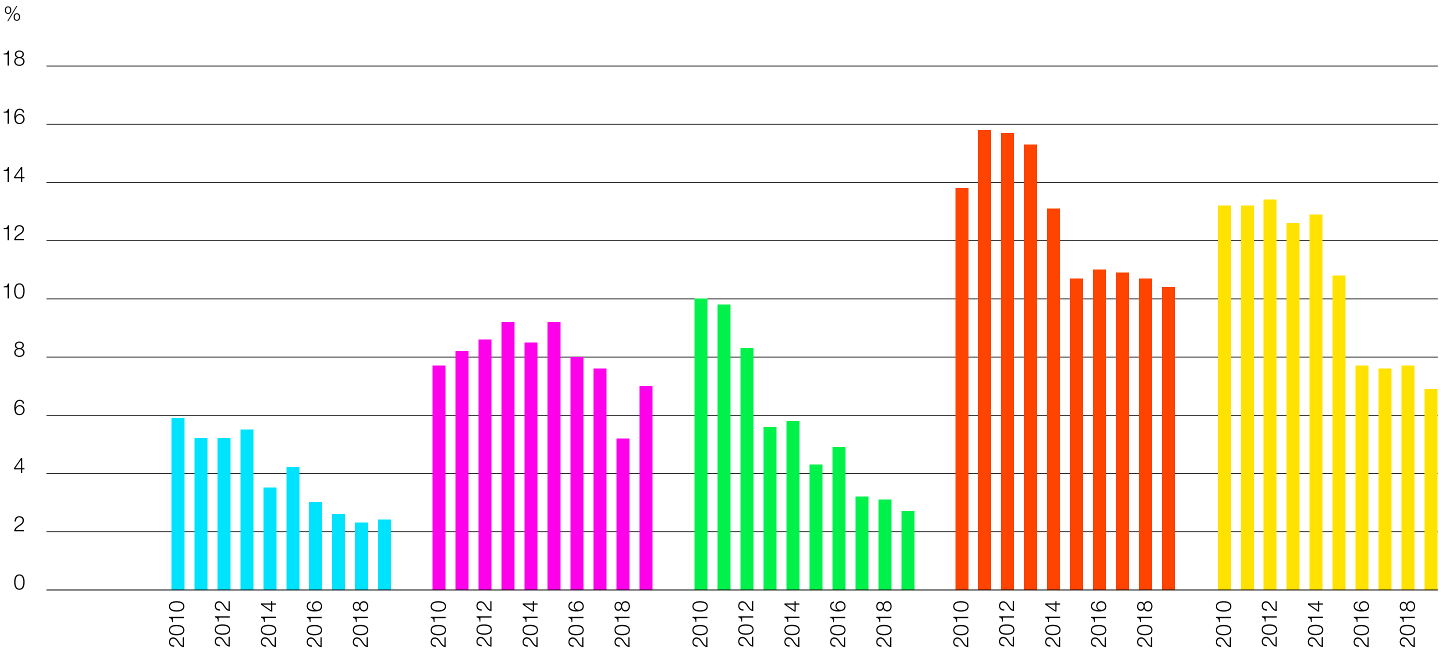
Source: BARB, BFI RSU analysis

FILM ON TERRESTRIAL TELEVISION, 2010-2019

As Figure 2 shows, the share of total programming hours dedicated to feature film varied widely across the terrestrial channels between 2010 and 2019. In most years, Channel 4 had the largest share of film hours in their schedules, while BBC One consistently had the smallest. In 2019, feature film accounted for over 10% of Channel 4's output and less than 3% of BBC One's output.

There has been an overall decline in the proportion of programming time allotted to film during the period, with the average share for terrestrial channels as a whole decreasing from 9% in 2010 to 4% in 2019.

Figure 2 Film as a percentage of total programming hours by channel, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
BBC One	5.9	5.2	5.2	5.5	3.5	4.2	3.0	2.6	2.3	2.4
BBC Two	7.7	8.2	8.6	9.2	8.5	9.2	8.0	7.6	5.2	7.0
ITV	10.0	9.8	8.3	5.6	5.8	4.3	4.9	3.2	3.1	2.7
Channel 4	13.8	15.8	15.7	15.3	13.1	10.7	11.0	10.9	10.7	10.4
Channel 5	13.2	13.2	13.4	12.6	12.9	10.8	7.7	7.6	7.7	6.9

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.)

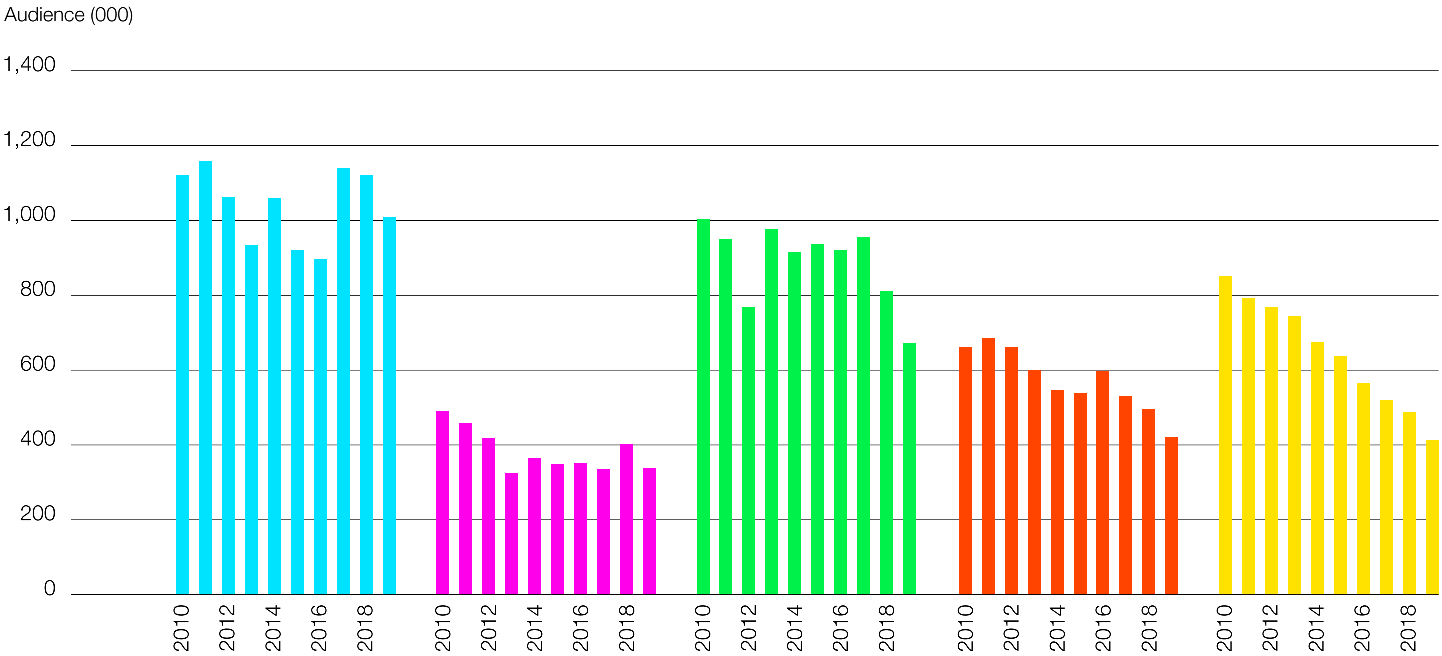
Film duration includes commercial breaks and promotions within broadcast on commercial channels.

Figures have been revised since publication of the 2019 Statistical Yearbook.

AUDIENCE FOR FILM ON TERRESTRIAL TELEVISION, 2010-2019

Figure 3 shows the average audience for feature film across all programming hours on the five terrestrial channels between 2010 and 2019. The overall trend across the channels has been a gradual decrease in average viewership, partly attributable to the growth of competition from on-demand services during the period. BBC One and ITV had the highest average audiences throughout the decade, while BBC Two had the lowest. The average audience for film in 2019 was one million on BBC One, 700,000 on ITV, 400,000 on both Channel 4 and Channel 5, and 300,000 on BBC Two.

Figure 3 Average audience for film, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
BBC One	1,121	1,158	1,063	933	1,059	920	896	1,139	1,122	1,008
BBC Two	492	458	419	325	364	349	352	335	403	339
ITV	1,005	950	769	976	915	937	922	956	812	672
Channel 4	661	686	663	600	548	539	597	532	495	422
Channel 5	852	793	769	745	675	637	565	520	487	413

Source: BARB, BFI RSU analysis

See notes to Figure 2.

TOP FILMS ON TERRESTRIAL TELEVISION

The most popular film on terrestrial television in 2019 was the independent UK production *Paddington 2*, which attracted an average audience of 6.3 million viewers for its Boxing Day premiere on BBC One (Table 2). In total, six of the top 10 films were network premieres. Three of the top 10 titles were UK qualifying films, two of which were US studio-backed productions.

Table 2 Top 10 films[1] on terrestrial television, 2019

Rank	Title	Channel	Country of origin	Year of release	Audience (million)
1	Paddington 2*	BBC One	UK/Fra	2017	6.3
2	Finding Dory*	BBC One	USA	2016	4.6
3	Frozen	BBC One	USA	2013	3.8
4	Beauty and the Beast*	BBC One	UK/USA	2017	3.6
5	Inside Out*	BBC One	USA	2015	3.5
6	Moana*	BBC One	USA	2016	3.4
7	Home Alone	Channel 4	USA	1990	3.1
8	The BFG	BBC One	USA	2016	2.9
9	The Jungle Book	BBC One	USA	1967	2.8
10	Fantastic Beasts and Where to Find Them*	ITV	UK/USA	2016	2.8

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.

* Film shown for the first time on terrestrial television.

In addition to *Paddington 2*, the top 10 list of most popular UK qualifying films on terrestrial television in 2019 includes two other titles which appear in the year's overall top 10 films. *Paddington 2* is one of six network premieres in the top 10 and is the only independent UK title (Table 3). Five of the top 10 films were shown on BBC channels.

Table 3 Top 10 UK qualifying films[1] on terrestrial television, 2019

Rank	Title	Channel	Country of origin	Year of release	Audience (million)
1	Paddington 2*	BBC One	UK/Fra	2017	6.3
2	Beauty and the Beast*	BBC One	UK/USA	2017	3.6
3	Fantastic Beasts and Where to Find Them*	ITV	UK/USA	2016	2.8
4	Pirates of the Caribbean: On Stranger Tides*	BBC One	UK/USA	2011	2.5
5	Alice Through the Looking Glass*	BBC One	UK/USA	2016	2.3
6	Jack Ryan: Shadow Recruit	Channel 4	UK/USA	2014	2.2
7	Spectre	ITV	UK/USA	2015	1.8
8	Billy Elliot	BBC Two	UK/Fra	2000	1.8
9	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	1.8
10	The Hitman's Bodyguard*	Channel 4	UK/Nld/USA	2017	1.8

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.

* Film shown for the first time on terrestrial television.

Nine of the top 10 most popular UK independent films on terrestrial television in 2019 were shown on BBC channels (Table 4). Five of these films – *I, Daniel Blake, Mrs. Brown's Boys D'Movie, Jane Eyre, Woman in Gold* and *Brooklyn* – were BBC Films-backed titles. *Brooklyn* also appeared in the 2018 top 10 list, while *Paddington* features in the list for the fourth consecutive year. Overall, three of the top 10 films were network premieres.

Table 4 Top 10 UK independent films[1] on terrestrial television, 2019

Rank	Title	Channel	Country of origin	Year of release	Audience (million)
1	Paddington 2*	BBC One	UK/Fra	2017	6.3
2	Paddington	Channel 4	UK/Fra	2014	1.7
3	The Limehouse Golem*	BBC Two	UK	2017	1.7
4	I, Daniel Blake*	BBC Two	UK/Fra/Bel	2016	1.4
5	Mrs. Brown's Boys D'Movie	BBC One	UK/Ire	2014	1.4
6	Jane Eyre	BBC One	UK/USA	2011	1.2
7	Porridge	BBC Two	UK	1979	1.2
8	Woman in Gold	BBC One	UK	2015	1.2
9	The Eagle Has Landed	BBC Two	UK	1976	1.1
10	Brooklyn	BBC One	UK/Can/Ire	2015	1.1

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 ON MULTI-CHANNEL TELEVISION

In 2019, multi-channel television (Freeview/satellite/cable) accounted for 58% of all viewings of film on television. For the purposes of this section, multi-channel television includes all free-to-air and paid (non-film subscription) channels, with the exclusion of the traditional terrestrial channels.

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 screened 30 or more feature films in 2019. After dedicated film channels, Talking Pictures (3,162 transmissions), Film4 (2,819) TCM (2,550) and Sony Max (2,413), the greatest number of film titles was screened by 5Spike with 1,954 transmissions. However, the largest average audiences for film were generated by ITV2 (392,000) and E4 (209,000).

In total, 5,544 unique film titles were screened on multi-channel television in 2019 across 31,180 slots, compared with 5,385 unique titles across 30,684 slots in 2018.

Table 5 Feature film on multi-channel television, 2019

Channel	Number of films broadcast	Average audience (000)	Top film[1]	Audience for top film (000)
Talking Pictures	3,162	41	Private's Progress	230
Film4	2,819	152	Independence Day: Resurgence	852
TCM	2,550	15	Battle of the Bulge	113
Sony MAX	2,413	2	Fanney Khan	42
5Spike	1,954	74	Battle of Britain	312
Sony MAX2	1,928	1	Kyo Kii... Main Jhuth Nahin Bolta	30
Colors Cineplex	1,899	2	Baazaar	37
London Live	1,593	6	Lunch Hour	63
5STAR	1,557	96	John Wick	453
SAB TV	1,457	2	Mahaan	29
Paramount Network	1,298	32	Private Benjamin	149
ITV4	1,292	147	The Shawshank Redemption	610
Zee Cinema	1,164	2	Raazi	48
ITV2	1,012	392	Harry Potter and the Deathly Hallows: Part 2	1,945
Syfy	1,005	29	Addams Family Values	121
Horror Channel	724	52	The Thing	198
Star Gold	370	2	De Dana Dan	32
E4	308	209	Captain America: The First Avenger	472
Sony Mix	213	0	Aasha	9
Comedy Central	190	60	Grown Ups	190
Venus TV	155	1	Jhooth Bole Kauwa Kaate	12
Zing	148	2	Sangam (1964)	25
5SELECT	143	28	Mrs Caldicot's Cabbage War	135
ITV3	120	198	Dad's Army	648
Comedy Central Extra	113	11	Fantastic Mr. Fox	87
Sky One	83	134	Man of Steel	320
Zee TV	80	4	Raazi	27
Universal	79	44	Coyote Ugly	143
More4	71	105	Sink the Bismark!	329
4seven	56	67	Madagascar	204
&TV	47	2	Dear Zindagi	14

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 2019.

Harry Potter and the Deathly Hallows: Part 2 attracted the year's highest average audience for a single transmission on multi-channel television in 2019, with 1.9 million viewers for its mid-January broadcast on ITV2 as part of the channel's 'Two Weeks of Harry Potter' season (Table 6). Films from the series dominate the top 10 list which includes only three non-Harry Potter titles. All of the top 10 titles were shown on ITV2. *Jurassic World*, which appears in the list for the second consecutive year, was the most watched title overall on multi-channel television in 2019, drawing 7.9 million viewers from seven transmissions.

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

Table 6 Top 10 films[1] on multi-channel television, 2019

Rank	Title	Channel	Country of origin	Year of release	Audience (million)
1	Harry Potter and the Deathly Hallows: Part 2	ITV2	UK/USA	2011	1.9
2	Elf	ITV2	USA	2003	1.7
3	Harry Potter and the Half-Blood Prince	ITV2	UK/USA	2009	1.6
4	Harry Potter and the Goblet of Fire	ITV2	UK/USA	2005	1.5
5	Harry Potter and the Order of the Phoenix	ITV2	UK/USA	2007	1.5
6	Harry Potter and the Chamber of Secrets	ITV2	UK/USA	2002	1.3
7	Harry Potter and the Prisoner of Azkaban	ITV2	UK/USA	2004	1.2
8	Harry Potter and the Philosopher's Stone	ITV2	UK/USA	2001	1.1
9	Love Actually	ITV2	UK/USA/Fra	2003	1.1
10	Jurassic World	ITV2	USA	2015	1.0

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 2019, pay TV film channels accounted for 19% of all viewings of film on television. The additional subscription TV film channels operated by Sky showed 2,015 unique titles across 48,663 slots during the year, with an average audience of 11,000. In 2018, these channels showed 2,301 unique titles across 47,751 slots, with an average audience of 12,000.

Table 7 shows the top 10 films, ranked by highest average audience for a single transmission, on these channels in 2019. All of the top 10 films were Sky Cinema Premiere transmissions. *The Grinch* achieved the year's highest single audience, with an average of 1.6 million viewers, for its first showing in early December, followed by *Mary Poppins Returns*, which attracted 1.5 million viewers for its Christmas Day premiere. *Mary Poppins Returns* is one of three UK qualifying films in the list (the others are *Avengers: Endgame* and *Fantastic Beasts: The Crimes of Grindelwald*), all of which are UK studio-backed titles. *Avengers: Endgame* gained the largest cumulative audience on pay TV in 2019, with six million viewers over 174 transmissions across five of Sky's dedicated film channels.

Table 7 Top 10 films[1] on pay TV film channels, 2019

Rank	Title	Channel	Country of origin	Year of release	Audience (million)
1	The Grinch	Sky Cinema Premiere	USA	2018	1.6
2	Mary Poppins Returns	Sky Cinema Premiere	UK/USA	2018	1.5
3	Extremely Wicked, Shockingly Evil and Vile	Sky Cinema Premiere	USA	2019	1.4
4	Incredibles 2	Sky Cinema Premiere	USA	2018	1.4
5	Aquaman	Sky Cinema Premiere	USA	2018	1.2
6	Fantastic Beasts: The Crimes of Grindelwald	Sky Cinema Premiere	UK/USA	2018	1.1
7	Avengers: Endgame	Sky Cinema Premiere	UK/USA	2019	1.1
8	Spider-Man: Into the Spider-Verse	Sky Cinema Premiere	USA	2018	1.1
9	Ralph Breaks the Internet	Sky Cinema Premiere	USA	2018	1.0
10	Ant-Man and the Wasp	Sky Cinema Premiere	USA	2018	1.0

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.

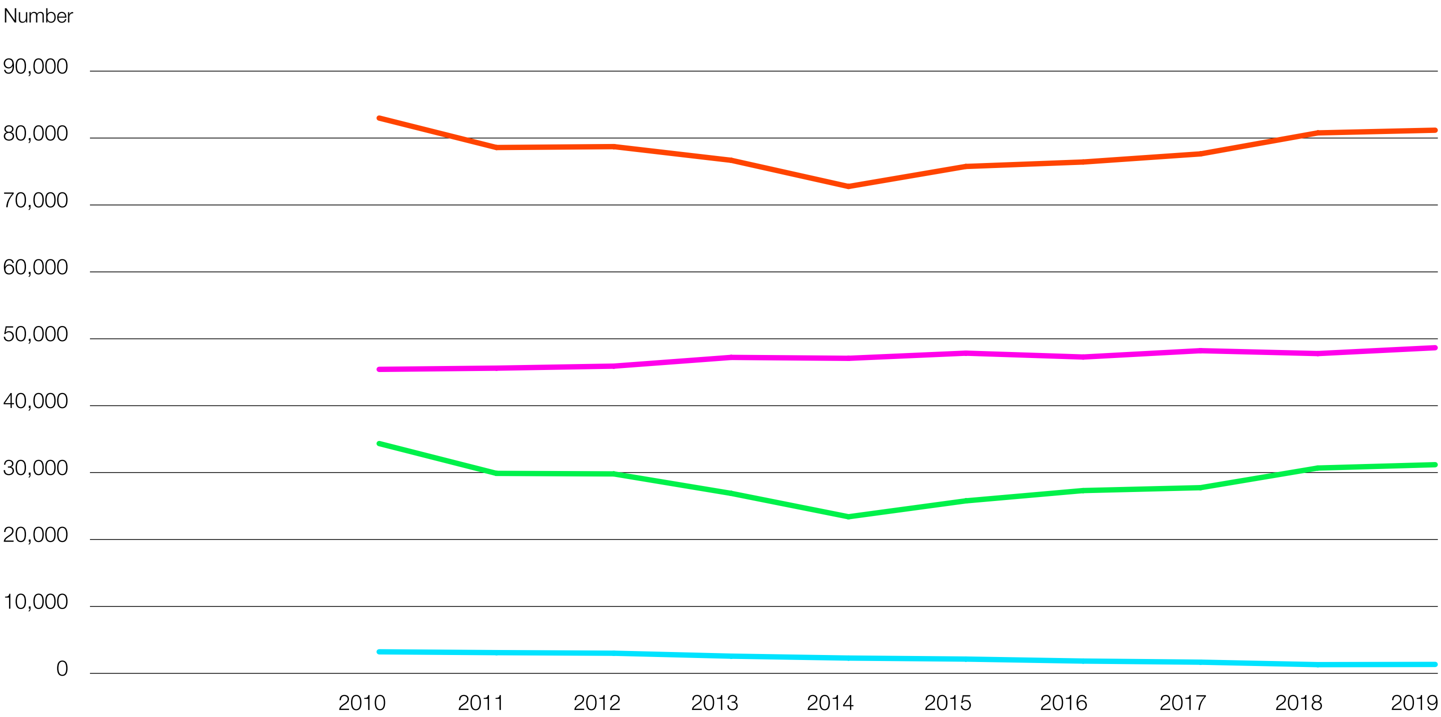
Image: *Fantastic Beasts: The Crimes of Grindelwald* © 2017 Warner Bros. Entertainment Inc. All Rights Reserved

FILM BROADCASTS AND AUDIENCE FOR FILM ON ALL TELEVISION CHANNELS, 2010-2019

Figure 4 shows that, since 2015, the overall number of films broadcast on UK television (not including pay-per-view) has been on an upward trend. In total, there were 81,174 film transmissions in 2019, up from 80,773 in 2018.

In terms of unique film titles available to television viewers in 2019, 1,101 films were shown on terrestrial television, 2,015 on pay TV film channels and 5,544 on multi-channel television. Overall, 7,667 individual film titles were shown across all television channels in 2019. (The overall total is less than the sum of individual categories, as some titles were shown on multiple platforms across the year.)

Figure 4 Total number of film transmissions on television (except pay-per-view), 2010-2019



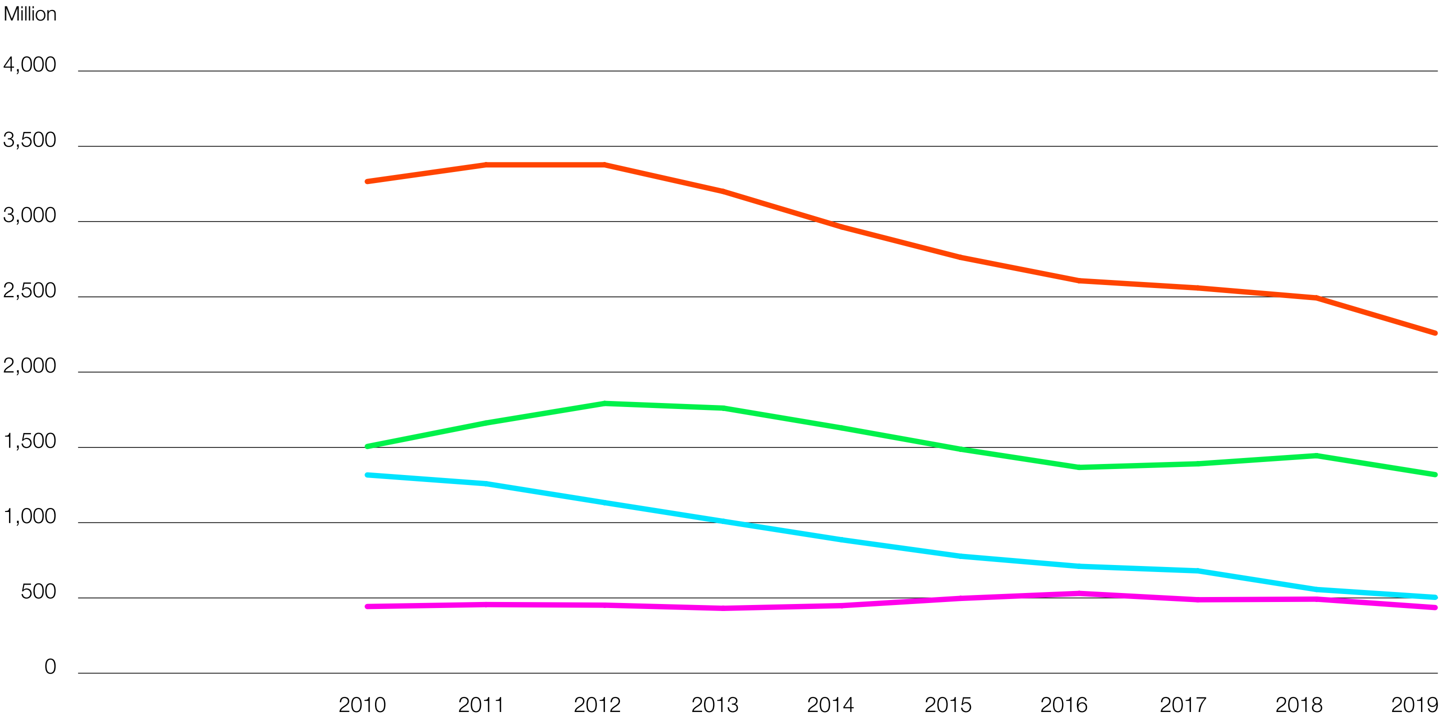
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Terrestrial	3,216	3,092	3,004	2,566	2,280	2,128	1,832	1,666	1,298	1,331
Pay TV film channels	45,430	45,611	45,913	47,216	47,081	47,850	47,274	48,221	47,791	48,663
Other multi-channel	34,342	29,883	29,804	26,896	23,402	25,777	27,315	27,747	30,684	31,180
Total	**82,988**	**78,586**	**78,721**	**76,678**	**72,763**	**75,755**	**76,421**	**77,634**	**80,773**	**81,174**

Source: BARB, BFI RSU analysis
Figures for 2017 and 2018 have been revised since publication of the 2019 Statistical Yearbook.

Across the 10-year period 2010-2019, the audience for film on television in the UK declined by 31% (Figure 5). In 2019, there were 2.3 billion viewings of film on television (not including pay-per-view), which represents approximately 54 film viewings per person, down from 58 in 2018. Audience numbers decreased for all platforms compared with 2018, with the steepest decline seen in film viewing on terrestrial channels which fell by 9%.

Multi-channel film broadcasts attracted the largest total audience in 2019 (1.3 billion viewers) while pay TV channels dedicated to film had the smallest total audience with 440 million viewers.

Figure 5 Total audience for film on television (except pay-per-view), 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Terrestrial	1,317	1,259	1,133	1,009	886	777	710	680	556	504
Pay TV film channels	443	456	452	431	449	497	530	488	492	436
Other multi-channel	1,506	1,662	1,792	1,761	1,629	1,488	1,367	1,391	1,445	1,319
Total	**3,266**	**3,377**	**3,377**	**3,200**	**2,964**	**2,762**	**2,607**	**2,559**	**2,493**	**2,259**

Source: BARB, BFI RSU analysis

Notes:

Audience numbers are based on total viewing sessions of 30 minutes+ consecutive film watching.

Figures for 2017 and 2018 have been revised since publication of the 2019 Statistical Yearbook.

THE VALUE OF FEATURE FILM TO BROADCASTERS

We estimate the value of feature film to UK broadcasters to have been approximately £865 million in 2019, down slightly from £896 million in 2018 (the 2018 value has been updated since publication of the 2019 Statistical Yearbook). Of this it is estimated that £118 million is attributable to UK films (£134 million in 2018). 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

FACTS IN FOCUS

The UK is the fourth largest film market in the world, generating revenues of £3.5 billion. In 2019, cinema-going remained the most significant component of the film value chain, with gross receipts of £1.25 billion.

- The total filmed entertainment market in the UK in 2019 was worth an estimated £3.5 billion, the same as in 2018.
- Revenues from digital video were up compared with 2018, while revenues from the box office, physical video (rental and retail), pay TV, terrestrial and multi-channel TV were down.
- Gross revenues for UK film were an estimated £1.1 billion, the same as in 2018.
- In 2019, 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 into 2024[1] .

[1] Omdia, *Cinema Admissions and Box Office Database Q4 2020* and *Home Entertainment Intelligence Database Q4 2020*

THE UK FILM MARKET AS A WHOLE

UK FILMED ENTERTAINMENT MARKET REVENUES

In 2019, theatrical revenues were the most significant component of the film value chain in the UK. As Table 1 shows, the box office accounted for 36% of total revenues (£1.25 billion) while digital video accounted for 28% (£968 million). Theatrical revenues were down slightly from £1.28 billion in 2018 (a 37% share of the UK market) while digital video revenues increased from £808 million (23%). Total television revenues represented 25% of the market in 2019 (£865 million), down from 26% in 2018 (£895 million) but much of this accrued to the television industry rather than to the suppliers of film. The physical video sector recorded the most significant loss in market share in 2019, falling from 14% in 2018 (£482 million) to just 11% (£370 million).

Gross revenues for UK films in 2019 were estimated to be £1.1 billion, with the share for British films highest in the theatrical market (48%) and lowest in the pay TV market (10%). Overall, the share of revenues attributed to UK films in 2019 was 32%, the same as in 2018.

Table 1 UK filmed entertainment market, 2018 and 2019

	2018			2019		
	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	1,282	591	46	1,254	597	48
Physical video rental	31	10	33	23	8	35
Physical video retail	451	176	39	347	139	40
Digital video	808	194	24	968	250	26
Pay TV	684	92	13	655	66	10
Terrestrial and multi-channel TV	211	42	20	210	52	25
Total	**3,467**	**1,105**	**32**	**3,457**	**1,112**	**32**

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 2018 and 2019 for all films exhibited in the UK. See The box office 2019 chapter.

'Physical video rental' is the total revenue from physical video rental (DVD, Blu-ray, etc) transactions in the calendar years 2018 and 2019. See Film on physical video chapter.

'Physical video retail' is the total revenue from physical video retail transactions in the calendar years 2018 and 2019. 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 pay 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.

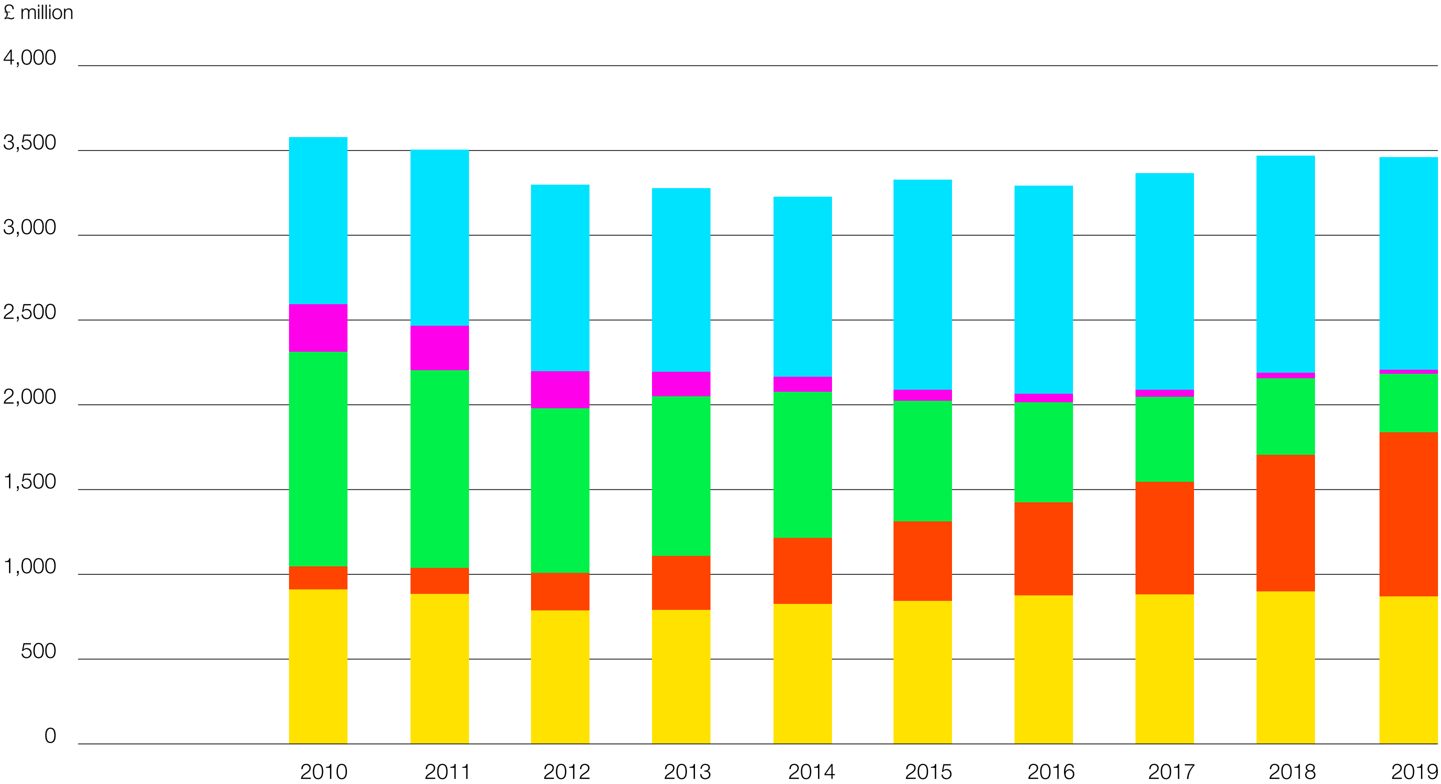
The revenues shown here are revenues earned by film in the UK market, whether UK or foreign films. The table does not include export revenues for the UK film industry. See UK film economy chapter for UK film export revenues.

Data for 2018 for digital video and terrestrial and multi-channel TV have been updated since publication of the 2019 Statistical Yearbook.

THE EVOLUTION OF UK FILM REVENUES, 2010-2019

Figure 1 shows aggregate film revenues between 2010 and 2019. While total revenues have fluctuated over the period, the data show a consistent decline in the value of the physical video market. The combined value of physical video sales and rentals fell from £1.5 billion in 2010 to less than £0.4 billion in 2019. At the same time, theatrical and digital revenues have increased. The growth in the value of the digital video market since 2010 has been significant, rising by a factor of seven over the period.

Figure 1 Gross film revenues, all platforms, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Theatrical	988	1,040	1,099	1,083	1,063	1,242	1,228	1,279	1,282	1,254
Physical video rental	278	262	221	146	88	63	49	40	31	23
Physical video retail	1,267	1,165	968	940	861	712	589	503	451	347
Digital video	136	154	224	320	392	469	551	662	808	968
Film on television	909	882	783	786	821	841	872	880	895	865
Total	**3,578**	**3,503**	**3,295**	**3,275**	**3,226**	**3,327**	**3,289**	**3,365**	**3,467**	**3,457**

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

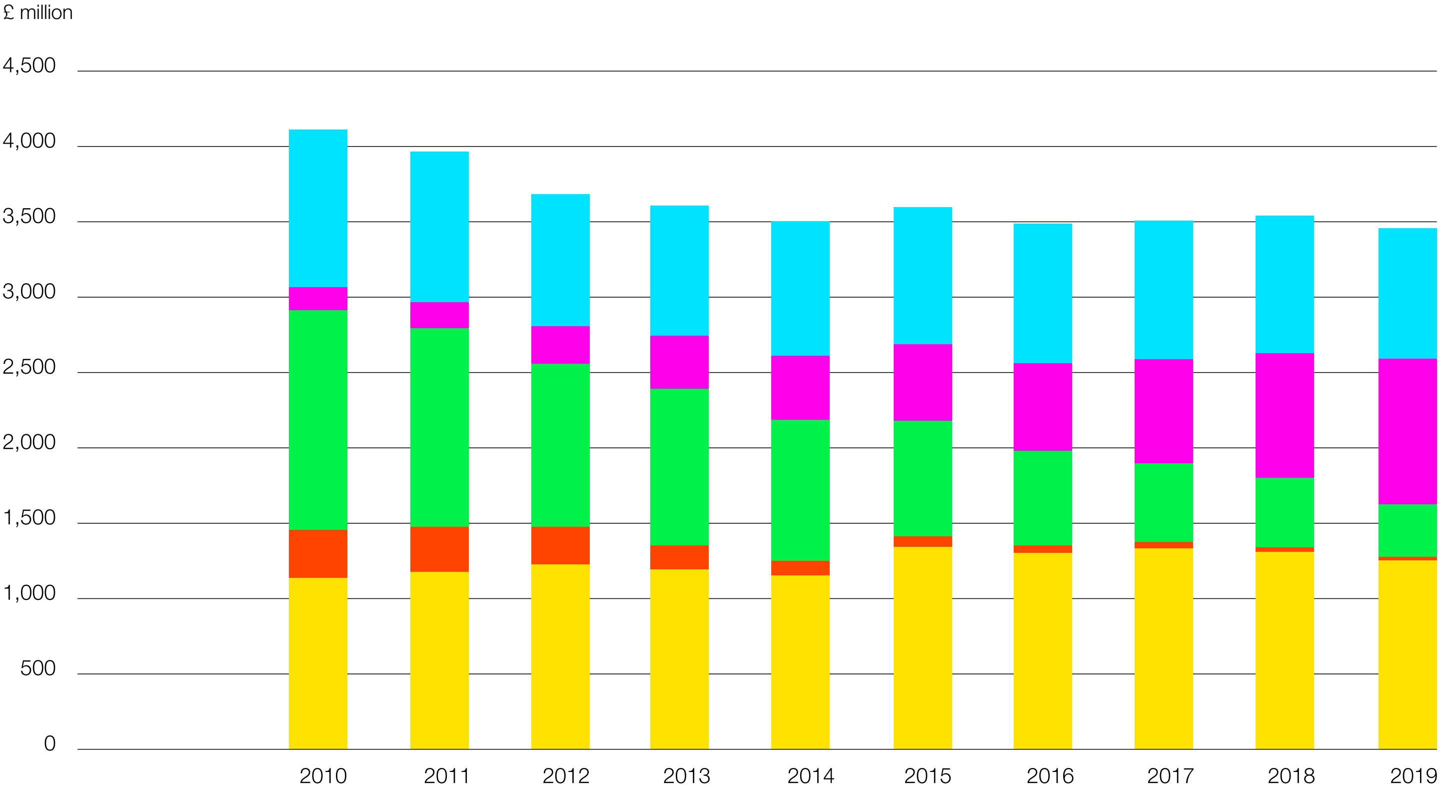
Notes:

'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.

The revenues shown in Figure 1 are the actual figures; if adjusted for inflation (Figure 2), the decline in revenues from the start of the period is clear, with the 2019 market down 16% from the peak in 2010. However, in real terms, film revenues have plateaued since 2013.

Figure 2 Gross inflation-adjusted film revenues, all platforms, 2010-2019 (expressed in 2019 pounds)



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Theatrical	1,136	1,177	1,228	1,193	1,155	1,342	1,302	1,333	1,309	1,254
Physical video rental	320	297	247	161	96	68	52	42	32	23
Physical video retail	1,456	1,319	1,082	1,036	935	769	625	524	460	347
Digital video	156	174	250	353	426	507	584	690	825	968
Film on television	1,045	998	875	866	892	908	924	917	913	865
Total	**4,112**	**3,965**	**3,682**	**3,608**	**3,504**	**3,593**	**3,487**	**3,506**	**3,538**	**3,457**

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

Notes:

Actual revenues deflated by the UK GDP deflator, which can be found https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-september-2020-spring-statement.

See notes to Figure 1.

Figures may not sum to totals due to rounding.

THE UK FILM MARKET IN THE GLOBAL CONTEXT

As Table 2 shows, in 2019, the UK had the fourth largest filmed entertainment market in the world after the USA, China and Japan. (It should be noted that data in this section are now provided by Omdia, and are not directly comparable with previously published figures.) According to Omdia's *Cinema Admissions and Box Office Database Q4 2020* and *Home Entertainment Intelligence Database Q4 2020*, the USA accounted for 35% of the world market in 2019, with China accounting for 17%, and Japan for 5.5%. The UK's share of the global market was just over 4%.

Table 2 Top 20 countries by filmed entertainment revenues, 2019

Country	US$ million	%
USA	25,932	34.7
China	12,692	17.0
Japan	4,132	5.5
UK	3,194	4.3
Germany	2,706	3.6
France	2,476	3.3
South Korea	2,140	2.9
India	1,921	2.6
Canada	1,683	2.3
Australia	1,510	2.0
Mexico	1,505	2.0
Brazil	1,416	1.9
Russia	1,087	1.5
Italy	1,065	1.4
Spain	1,041	1.4
Netherlands	723	1.0
Poland	550	0.7
Sweden	471	0.6
Taiwan	431	0.6
Indonesia	419	0.6
Rest of the world	*7,545*	*10.1*
Total	**74,638**	**100.0**

Source: Omdia, BFI

Notes:

Information contained in this table was taken from Omdia's *Cinema Admissions and Box Office Database Q4 2020* and *Home Entertainment Intelligence Database Q4 2020*.

'Filmed entertainment revenues' comprise box office receipts, sales of physical video (rental and retail), digital video revenues, and income generated by films shown on television (including analogue, cable, digital terrestrial, Internet Protocol, and satellite systems).

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

According to Omdia forecasts, all of the top 20 countries will retain their positions in the list into 2024, with the USA, China, Japan and UK remaining the world's top four markets for filmed entertainment (Table 3). It should be noted that these projections were compiled in 2020 and take into account the impact of the global COVID-19 pandemic. The data indicate lower growth over the period in countries for which box office revenues make up a significant share of overall filmed entertainment revenues, such as Japan (with predicted growth of 11%) and India (14%). Conversely, growth is predicted to be strongest in countries where home entertainment platforms generate a substantial share of total filmed entertainment revenues, such as Sweden (with predicted growth of 52%) and Russia (42%).

Table 3 Top 20 countries by filmed entertainment revenues, forecast for 2024

Country	US$ million	%	% predicted growth 2019-2024
USA	32,456	35.0	25.2
China	15,415	16.6	21.5
Japan	4,579	4.9	10.8
UK	3,993	4.3	25.0
Germany	3,345	3.6	23.6
France	3,130	3.4	26.4
South Korea	2,555	2.8	33.0
India	2,431	2.6	13.6
Canada	1,981	2.1	31.7
Australia	1,929	2.1	14.6
Mexico	1,901	2.0	25.9
Brazil	1,722	1.9	21.6
Russia	1,476	1.6	41.8
Italy	1,322	1.4	24.2
Spain	1,256	1.4	15.6
Netherlands	862	0.9	19.2
Poland	698	0.8	26.8
Sweden	637	0.7	52.0
Taiwan	573	0.6	21.5
Indonesia	558	0.6	29.5
Rest of the world	*9,947*	*10.7*	*31.9*
Total	**92,767**	**100.0**	**24.3**

Source: Omdia, BFI

See notes to Table 2.

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

AUDIENCES

FACTS IN FOCUS

In 2019, nine in every ten adults in the UK watched a film on any platform. Although the audience for SVoD continues to grow, adults were more likely to have watched a film on a broadcast TV channel than any other way.

- 90% of UK adults have watched a film in the last 12 months
- Amongst these film viewers 55% watched a film at the cinema
- 41% of all cinema-going occasions in 2019 were by young people aged 15-24
- The youngest skewing title at the cinema was *Blue Story* with 74% of its audience aged 15-24
- The oldest skewing title at the cinema was *Fisherman's Friends* with 68% of its audience aged 55+
- The audience for *Downton Abbey*, the highest performing UK independent film of 2019, was 70% female and 78% ABC1
- Adults aged 55+ make up half of the viewing audience for film on TV
- 44% of the total SVoD audience are aged 18-34

Cover image: *Blue Story,* Nick Wall/Paramount Pictures

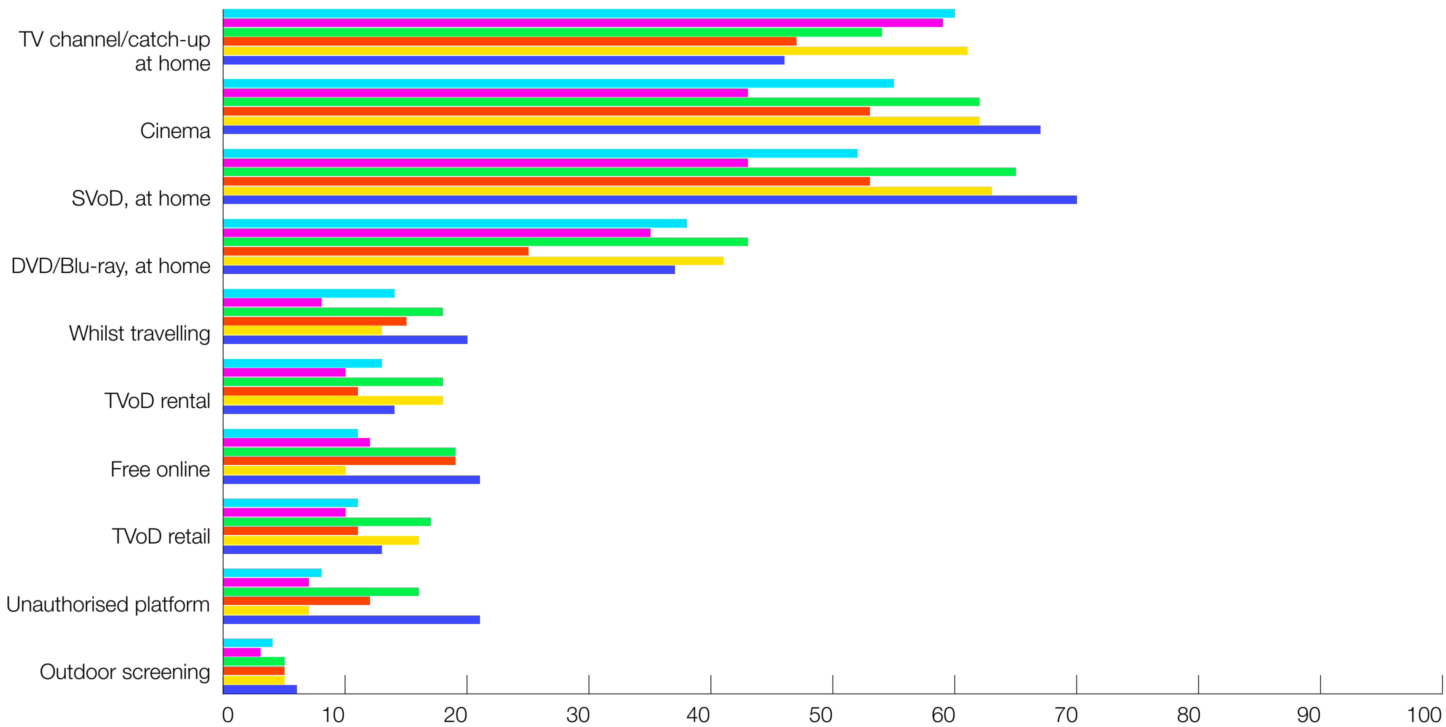
AUDIENCES

AUDIENCES FOR FILM IN THE UK BY PLATFORM

When asked whether they had viewed a film at any location or by any method / platform in the previous 12 months, 90% of the UK adult population (aged 16+) responded positively. The 12 month reach for BAME audiences and adults with a disability was 87%, and 93% for adults with a child under 18. At the specific film viewing location or platform level, the highest reach amongst all adults was for film on broadcast TV channels (60%) (Figure 1). In contrast, for adults aged 16-24, adults with a child under 18, BAME and LGBTQ audiences, the most popular platform used to watch films was subscription video-on-demand services (SVoD). Adults with a disability were less likely to have viewed a film on SVoD (43%) than adults as a whole (52%), and broadcast TV channels achieved the highest reach amongst this group (59%).

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

% of group



	TV channel catch-up, at home	Cinema	SVoD, at home	DVD/Blu-ray, at home	Whilst travelling	TVoD rental	Free online	TVoD retail	Unauthorised platform	Outdoor screening
Adults	60	55	52	38	14	13	11	11	8	4
Disability	59	43	43	35	8	10	12	10	7	3
LGBTQ	49	62	65	43	18	18	19	17	16	5
BAME	48	53	53	25	15	11	19	11	12	5
Adults with child under 18	47	62	63	41	13	18	10	16	7	5
Age 16-24	46	67	70	37	20	14	21	13	21	6

Source: BFI/YouGov Nations & Regions Survey, Oct/Nov 2019, Base: n=12,029 UK adults, 16yrs+

Q. In which of the following venues or ways have you watched a film in the past 12 months? Please select all that apply.

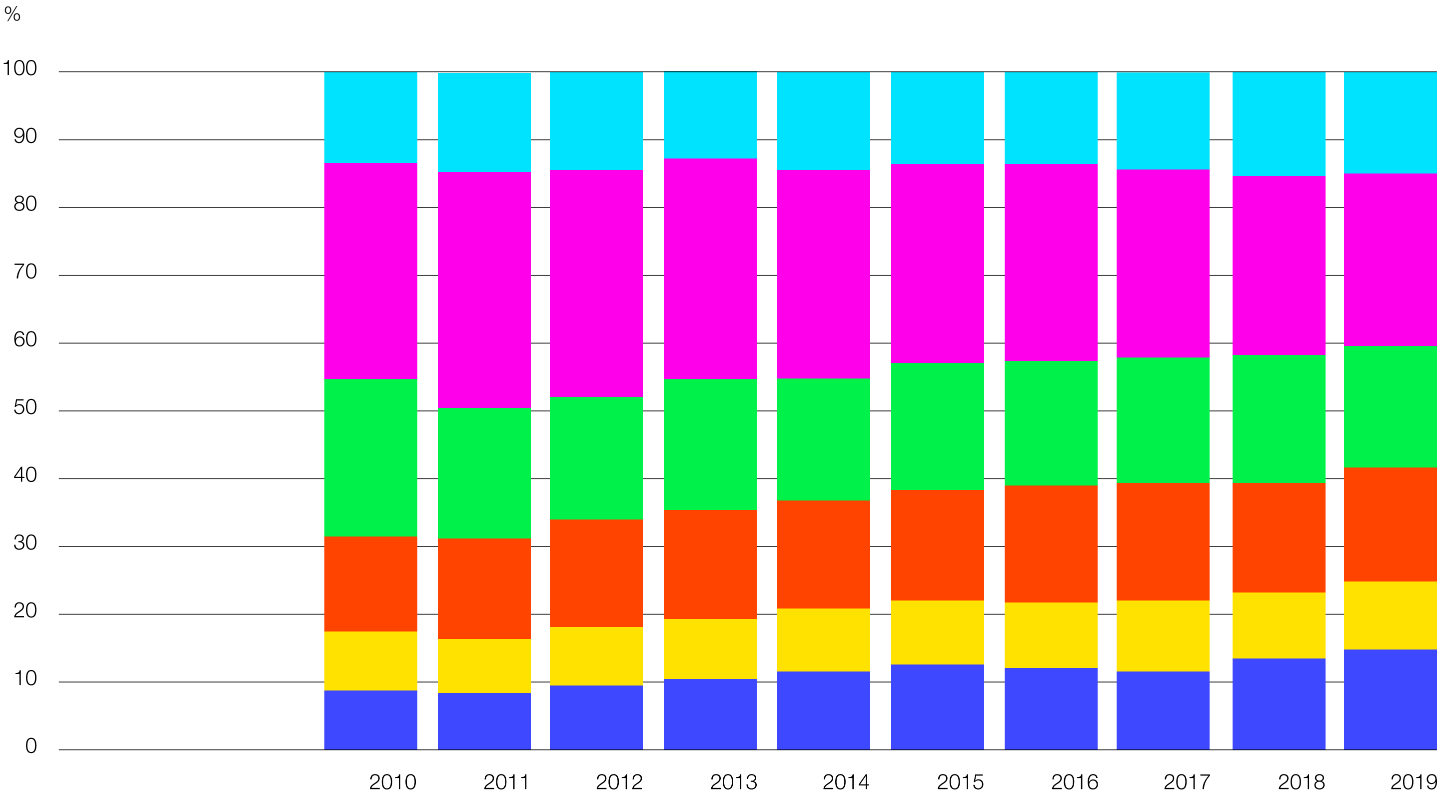
CINEMA AUDIENCE BY AGE

Figure 3 shows the trends by age for cinema admissions between 2010 and 2019. Admissions here are based on weighted averages of the audience profiles for all releases reported by the Cinema Advertising Association (CAA) Film Monitor (in 2019 this covered 84 new theatrical releases).

The relative proportion of admissions for each category has been broadly similar throughout the period, with the exception of audiences aged between 15-24 and those aged 55+. There has been a small, but steady, downward trend in the share of admissions accounted for by 15-24 year olds, which decreased from a high of 35% in 2011 to a low of 26% in 2019, and an increase in the admissions share of cinema-goers aged 55 or over, which rose from a low of 9% in 2010 to a high of 14% in 2019.

Regardless of this change in profile, which represents slightly fewer admissions than in the previous year, the 15-24 year old age group is still the largest demographic in the cinema audience for films released into cinemas in 2019.

Figure 2 Age distribution of cinema audience, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Age 7-14	13.6	14.6	14.4	12.9	14.4	13.6	13.6	14.3	15.4	15.1
Age 15-24	31.8	34.8	33.5	32.5	30.8	29.4	29.1	27.8	26.4	25.5
Age 25-34	23.3	19.3	18.1	19.4	18.0	18.7	18.4	18.5	18.9	17.9
Age 35-44	14.0	14.8	15.8	16.1	15.9	16.3	17.2	17.3	16.1	16.8
Age 45-54	8.7	8.0	8.7	8.8	9.3	9.5	9.7	10.5	9.8	10.1
Age 55+	8.7	8.3	9.4	10.4	11.5	12.5	12.0	11.5	13.4	14.7

Source: Cinema Audience Agency (CAA) Film Monitor, 2010-2019

Notes:

'Cinema audience' in this chart and throughout this chapter refers to gross film-going occasions. That means, if a person went to the cinema to see 10 films in the year, that person would have contributed 10 film-going occasions to the audience figures above, unless otherwise stated. Repeat visits to the same films are not recorded in Cinema Advertising Association (CAA) Film Monitor.

CAA Film Monitor reports the audience profile of 84 film titles (mostly mainstream) of the theatrical releases in 2019. The Film Monitor survey is carried o every fortnightly with an omnibus survey panel of over 1,000 adults and children aged 7+ who had been to the cinema in the previous three months. The survey does not cover Northern Ireland.

Annual cinema going age profiles are based on audiences to films released in that year and reported by the CAA Film Monitor for that year.

CINEMA AUDIENCE BY GENDER AND SOCIO-ECONOMIC STATUS

According to CAA Film Monitor data, whilst the proportion of males to females for all cinema going audiences is equal, Table 1 shows that there are differences by age group. For younger cinema going audiences, the profile skews male (52%) but for audiences aged 35+ or over, women (56%) outweighed men.

The average cinema audience consistently attracts a higher proportion of individuals from the ABC1 socio-economic grades in all age groups compared with the general population. This is most marked amongst the 35+ year old audience, 69% of which was comprised of ABC1 cinema-goers in 2019.

Table 1 Cinema audiences by age and gender/social grade, 2019

	Cinema audiences					UK population
	Age 7-14	Age 15-24	Age 25-44	Age 35+	All 7+	7+
	%	%	%	%	%	%
Males	52	53	52	44	50	49
Females	48	47	48	56	50	51
ABC1	59	59	63	69	63	54
C2DE	41	41	37	31	37	46

Source: CAA Film Monitor, 2019
See notes for Figure 2

CINEMA AUDIENCE FOR UK FILMS

This section looks at the audience profile for UK films as a subset of all film. Of the 84 new releases covered by the CAA Film Monitor in 2019, 35 were UK qualifying productions, of which 20 were UK independent titles (compared with 33 and 15 in 2018).

As Table 2 shows, the audience profile for UK films is slightly different to that for all film. UK films attracted a smaller proportion of cinema goers in the 15-44 year old age range (55%) compared to 60% for all film. UK films skewed slightly more female (52%) than all film (50%), and also had a slightly more upmarket audience profile (65% ABC1) than that for all film (63%)

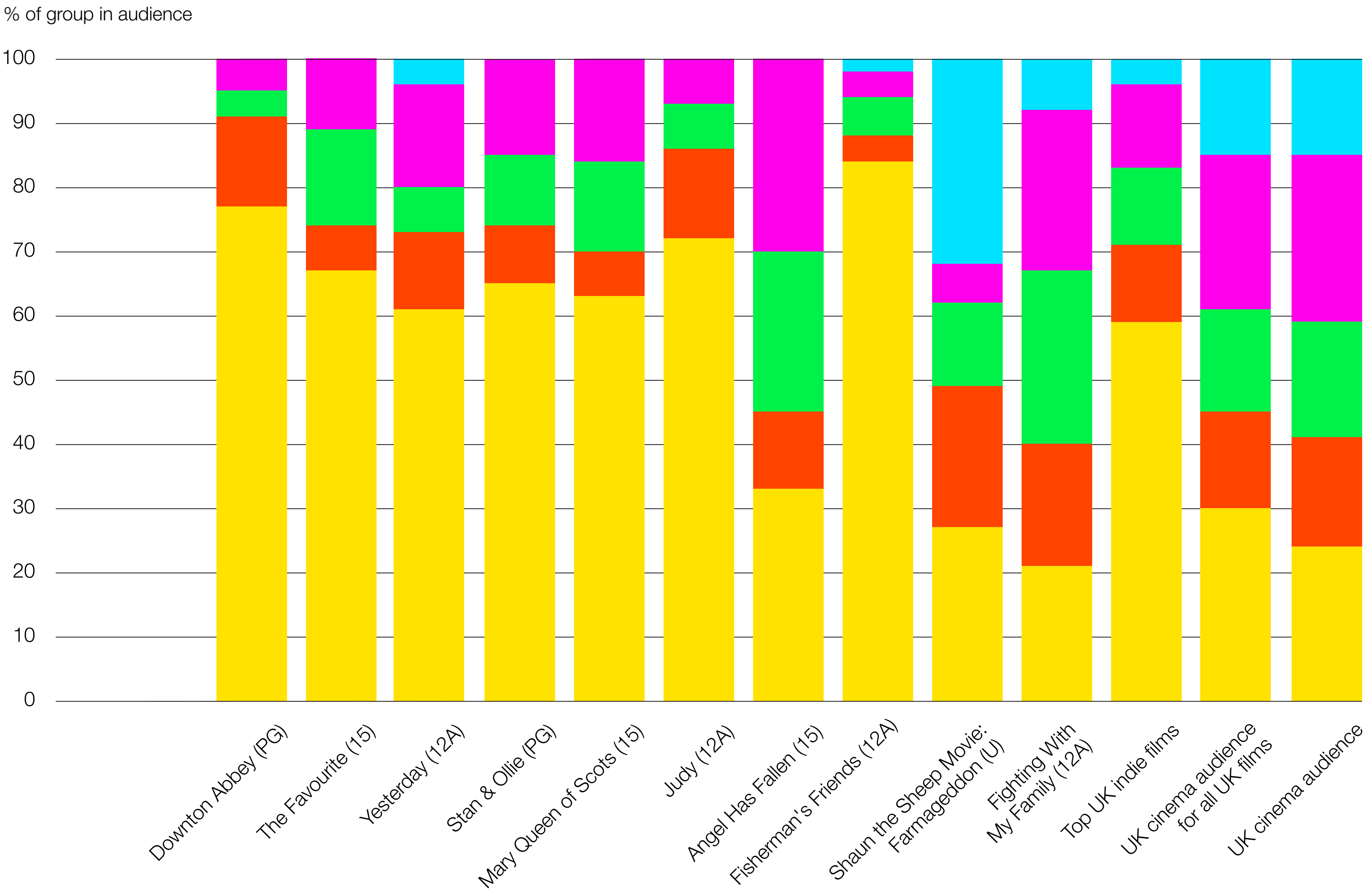
Table 2 Audience profile of UK films compared with all film, 2019

	UK film	All film (including UK film)
	%	%
Age 7-14	15.2	15.2
Age 15-24	24.1	25.8
Age 25-34	16.1	17.8
Age 35-44	15.0	16.8
Age 45-54	10.8	10.0
Age 55+	18.7	14.4
Male	47.9	49.7
Female	52.1	50.3
ABC1	65.3	63.2
C2DE	34.7	36.8
England	84.1	84.1
Scotland	8.0	7.7
Wales	7.9	8.2

Source: CAA Film Monitor, 2019
See notes for Figure 2

The top 10 UK independent films released in 2019 show a skew towards older audiences, with 59% of the overall audience for the top 10 films being in the 45+ year old age group (Figure 3). For seven of the top 10 UK independent films over half the audience was aged over 45yrs; these features were mostly a mix of period films and romantic comedies, with over 80% of the cinema audience for *Fisherman's Friends* being in this older age group. This contrasts with audiences for UK films overall, where just 30% are 45 years or older. The films with younger profiles amongst the top 10 UK independent films are action film *Angel Has Fallen* (67% being in the under 45 year old age group), children's film *Shaun the Sheep Movie: Farmageddon* (73%), and wrestling comedy-drama *Fighting with My Family* (79%).

Figure 3 Cinema audience profile by age for the top 10 UK independent film titles, 2019, ranked by box office performance



Age 7-14	0	0	4	0	0	0	0	3	32	9	4	15	15
Age 15-24	5	11	16	14	16	8	30	4	6	25	13	24	26
Age 25-34	4	15	7	11	14	7	25	6	13	27	12	16	18
Age 35-44	14	7	12	9	7	14	12	4	22	19	12	15	17
Age 45+	77	67	61	65	63	72	33	84	27	21	59	30	24

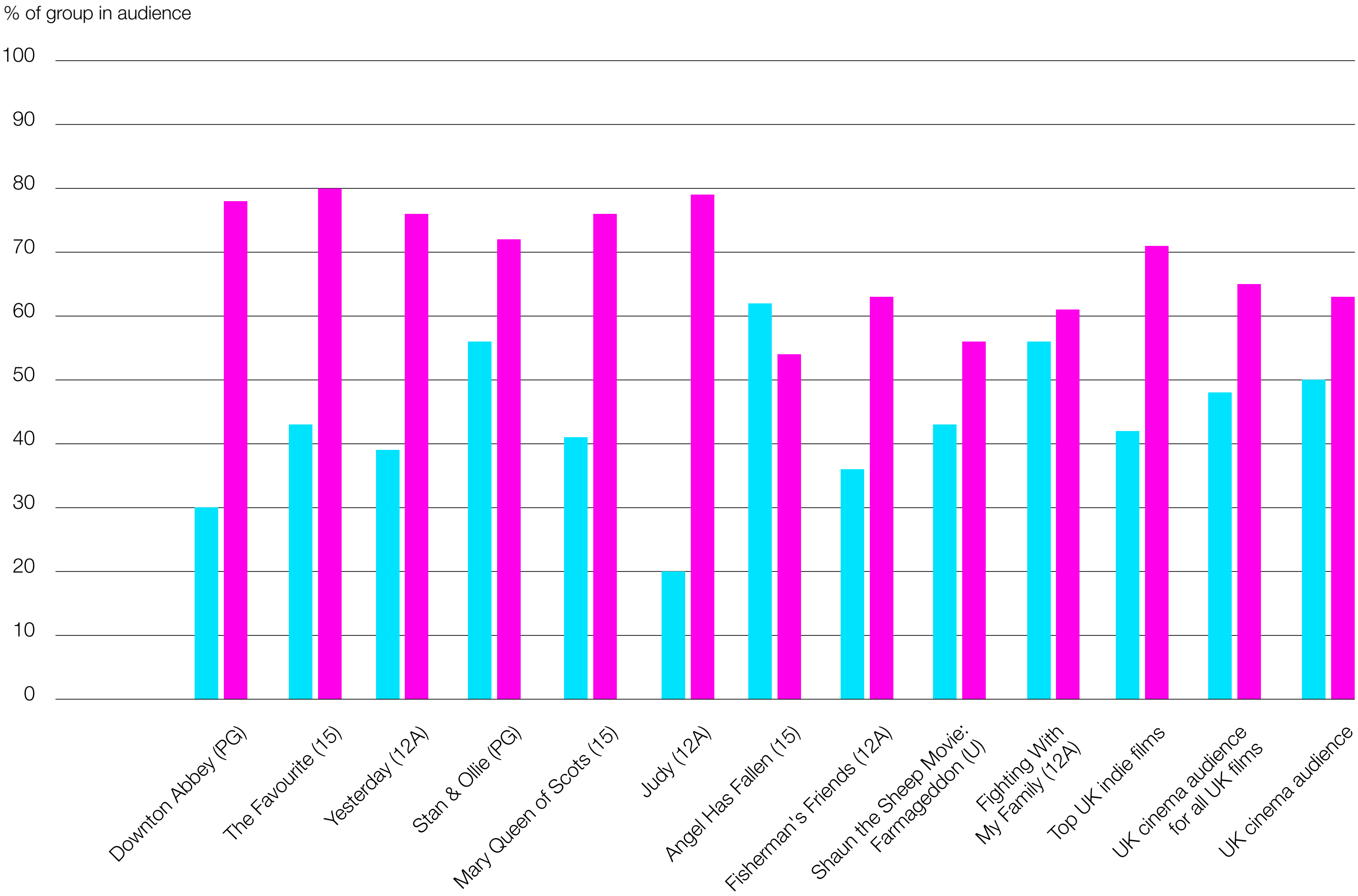
Source: CAA Film Monitor, 2019

See notes for Figure 2

In contrast to 2018 when the top 10 UK independent films attracted a relatively equal gender split (% males: % females), in 2019 58% of the total audience for the top 10 films were female (Figure 4). Seven of the UK independent features had a majority female audience, with profiles that ranged from 57% female for *The Favourite* to 80% for *Judy*. The other three features in the top 10 list attracted a higher proportion of men in the audience: *Angel Has Fallen* (62% male), *Fighting With My Family* and *Stan & Olllie* (both 56%),

As well as attracting a higher proportion of older viewers than cinema films in general, the top 10 UK independent titles in 2019 also achieved a higher share of admissions amongst those in the ABC1 socio-economic group. Overall the profile of the top 10 UK independent films in 2019 was 71% ABC1 and 29% C2DE and unchanged from 2018. This compares to an ABC1 profile of 63% for the overall UK cinema audience, and 61% for the 35 UK qualifying films covered by the CAA Film Monitor. UK independent titles which indexed below the average ABC1 profile and appealed more to audiences in the lower socio-economic categories included *Fighting With My Family* (61%), *Shaun the Sheep: Farmaggedon* (56%) and *Angel Has Fallen* (54%).

Figure 4 Cinema audience profile by gender and socio-economic status for the top 10 UK independent film titles, 2019, ranked by box office performance



	Downton Abbey (PG)	The Favourite (15)	Yesterday (12A)	Stan & Ollie (PG)	Mary Queen of Scots (15)	Judy (12A)	Angel Has Fallen (15)	Fisherman's Friends (12A)	Shaun the Sheep Movie: Farmageddon (U)	Fighting With My Family (12A)	Top UK indie films	UK cinema audience for all UK films	UK cinema audience
Male	30	43	39	56	41	20	62	36	43	56	42	48	50
ABC1	78	80	76	72	76	79	54	63	56	61	71	65	63

Source: CAA Film Monitor, 2019

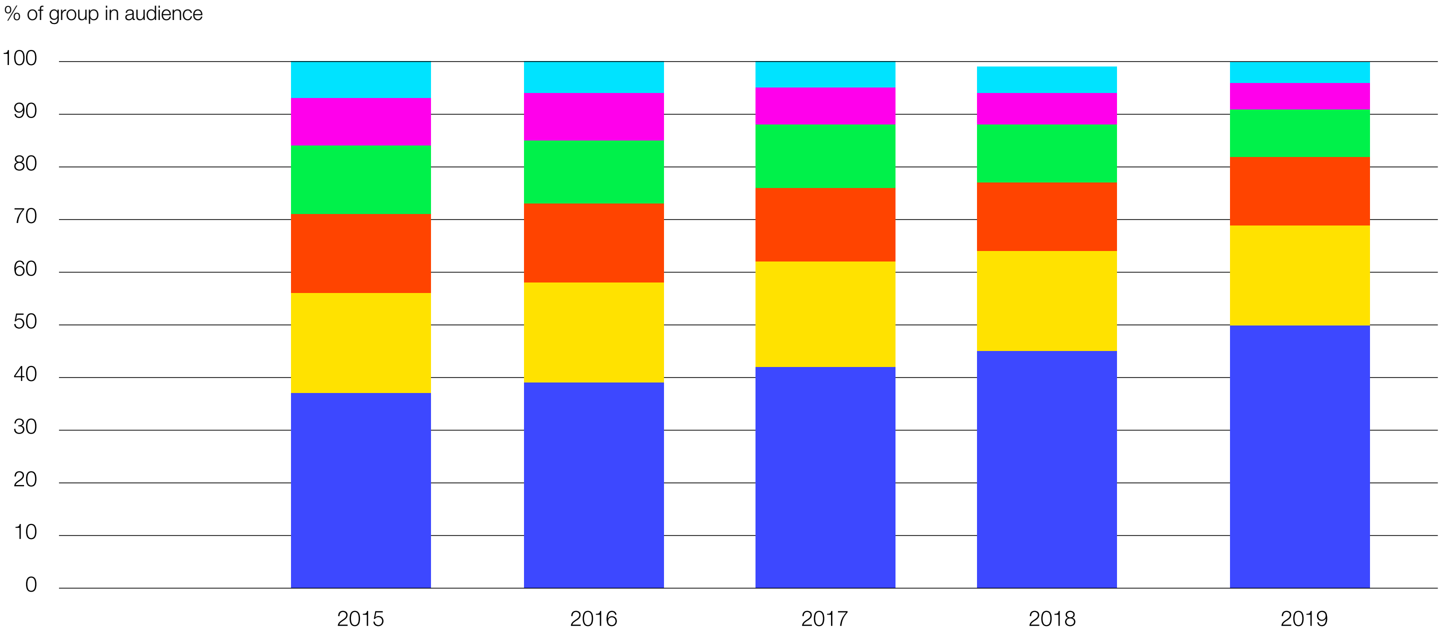
See notes for Figure 2

AUDIENCES FOR FILM ON TELEVISION

The age distribution of audiences for films watched on television continues to differ markedly from that for films shown at the cinema. Overall, individuals who watch films on television tend to be in the older age groups, and for the first time, half of the average television audience for film in 2019 was aged 55 or over. As with cinema-goers, there is evidence that the television audience is growing older through time, both for film and across all broadcast television, and at a faster rate than this group's representation within the UK population as a whole. As Figure 5 shows, the proportion of older (45+) viewers increased by 13 percentage points between 2015 and 2019 (from 56% to 69%), whilst the percentage of 15-24 year olds almost halved during the same period (9.3% to 4.9%).

These changes in the data for television audiences for film are due to overall changes in the way in which film and television content is now consumed in British homes, and much of the change in profile is due to methodology factors in the measurement of television audiences, which has experienced challenges keeping up with the multiple access and behavioural developments occurring over the past few years. These data, by and large, reflect the audience to live and recorded broadcast channels rather than the totality of viewing on the TV set including on demand and streaming services viewed on internet connected TV's. This will be explored further later in the chapter.

Figure 5 Age distribution of television audiences for film, all channels, 2015-2019



	2015	2016	2017	2018	2019
Age 7-14	7	6	5	5	5
Age 15-24	9	9	7	6	5
Age 25-34	13	12	12	11	9
Age 35-44	15	15	14	13	13
Age 45-54	19	19	20	19	19
Age 55+	37	39	42	45	50

Source: BARB/TechEdge, All individuals 7yrs+, Total TV, filtered on 'film' genre

Notes:

Television audience analyses are sourced from BARB data and cover all programmes classified by BARB's genre attribution as 'films'. Figures have been updated for previous years due to a change in genre metadata classification.

FILM PREFERENCE BY AGE

Tables 3-8 show the top 10 films with the strongest profiles for six separate age groups (as a % of all individuals aged 7+), for all films captured in the CAA Film Monitor and released in 2019. This is compared with the equivalent profile ranking for all films transmitted on any broadcast television channel. These tables therefore do not represent the films seen by the largest number of viewers within each age group (% of group in audience) but rather the films whose audience, regardless of size, delivered the highest proportion of its audience from, or had the strongest affinity for, each age group (% of audience in group).

A majority of the top 10 ranking films for the 7-14 year old age group, are those that have been explicitly produced for that age group, with the children's series *Horrible Histories'* big screen outing being the film with the largest proportion of these younger viewers within its audience (Table 3). Both this film and *Arthur Christmas*, which had the strongest 7-14 profile amongst films on broadcast TV, are UK films.

The audience profile for UK crime drama *Blue Story* was primarily driven by the 15-24 year old age group (74%, Table 4), mirroring the age range of the main characters in the film. The other films at the cinema attracting the strongest profiles amongst this age group were either action or horror films, with the exception of *Good Boys* – a coming-of-age comedy. The genre of films on TV attracting the largest percentage of this age group were more varied, and included music/dance dramas *Pitch Perfect, Step Up 3*, and *Step Up 2: The Streets.*

For the 25-34 year old age group it was a TV transmission of the 1997 UK comedy *Bean*, with a 40% 25-34 profile, that had the strongest affinity for this group amongst the top 10 broadcast and cinema films (Table 5). The majority of top 10 films on TV with high proportions of this group in the audience were also millennium-era feature releases. Amongst films at the cinema, *Long Shot*, the Charlize Theron / Seth Rogen rom-com, was the title with the strongest % profile for this age group (31%).

The top 10 highest affinity films for the 35-44 year old age group are split between family-orientated and adult-orientated titles. The diversified list ranges from the 18 certificate *Rambo: Last Blood* and the gross out comedy *There's Something About Mary* to the animated features *Abominable* and *The Lego Movie 2* (Table 6). This breadth of genres suggests that this age group's viewing habits is strongly influenced by the presence or not of younger members of their family.

As previously described the age profile of UK independent films generally skews to older age groups (Figure 3), and this is reflected in the top films at the cinema with the strongest profiles for the 45-54 year old and 55yrs+ age groups. Seven of the top 10 ranking films for 45-54 year olds (Table 7) and eight amongst the 55+ age group were UK independent films, with *Fisherman's Friends, The Good Liar, The Favourite* and *Stan & Ollie* featuring on both lists.

Films with the strongest 55+ age profile tend to include a higher number of older films than the top ranking films for younger age groups. Where the oldest film in the 45-54 age group is *Carry on Camping* (1969), the oldest film in the 55+ age group is *In Which We Serve* (1942).

Table 3 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 7-14 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Horrible Histories The Movie – Rotten Romans (PG)*	43	Arthur Christmas (BBC 1)*	28
Spies In Disguise (PG)	41	Hotel Transylvania 2 (BBC 1)	27
The Kid Who Would Be King (PG)*	39	Antz (BBC 1)	27
The Lego Movie 2 (U)	37	Despicable Me 2 (BBC 1)	27
The Secret Life of Pets 2 (U)	36	Captain Underpants (BBC 1)	26
Angry Birds 2 (U)	36	Captain America: Civil War (BBC 1)	26
Abominable (U)	35	Scooby Doo 2: Monsters Unleashed (CH4)	26
Wonder Park (PG)	35	Home Alone (ITV)	24
The Addams Family (PG)	34	Jack Frost (ITV)	23
Dora and the Lost City of Gold (PG)*	33	Hotel Transylvania (BBC 1)	23
7-14 yrs average profile of all films	15	7-14yrs average profile of all films on TV	5
7-14 yrs in survey population	10	7-14yrs in total TV audience	4

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2

Television audiences are originated from BARB data and cover all films classified by BARB as '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 4 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 15-24 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Blue Story (15)*	74	Pitch Perfect (ITV2)	29
Scary Stories To Tell In the Dark (15)	64	The Polar Express (BBC 2)	28
Us (15)	63	The World's End (ITV2)*	26
It: Chapter Two (15)	58	Bad Neighbours (5STAR)	26
Annabelle Comes Home (15)	52	Step Up 3 (ITV2)	25
Zombieland: Double Tap (15)	49	Now You See Me (ITV2)	25
Good Boys (15)	44	Kung Fu Panda 2 (ITV)	25
Joker (15)	42	Yes Man (5USA)	23
Pet Sematary (15)	41	Step Up 2: The Streets (ITV2)	23
John Wick: Chapter 3 - Parabellum (15)	41	The Hunger Games: Catching Fire (BBC 2)	23
15-24 yrs average profile of all films	26	15-24 yrs average profile of all films on TV	5
15-24 yrs in survey population	14	15-24 yrs in total TV audience	4

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 5 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 25-34 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Long Shot (15)	31	Bean (Channel 5)*	41
Stephen King's Doctor Sleep (15)	29	The Hangover (BBC 2)	40
Ad Astra (12A)	29	How The Grinch Stole Christmas (Channel 5)	38
Cold Pursuit (15)*	29	Titanic (ITV2)	37
Glass (15)	28	American Pie 2 (ITV)	36
Terminator: Dark Fate (15)	28	Fast & Furious 7 (5STAR)	36
Pet Sematary (15)	27	Dodgeball: A True Underdog Story (Film4)	33
Hustlers (15)	27	Identity Thief (ITV2)	32
Fighting With My Family (12A)*	27	The 40 Year Old Virgin (BBC 1)	32
X-Men: Dark Phoenix (12A)	26	Step Up 2: The Streets (ITV2)	32
25-34 yrs average profile of all films	18	25-34 yrs average profile of all films on TV	9
25-34 yrs in survey population	14	25-34 yrs in total TV audience	8

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 6 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 35-44 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Abominable (U)	38	Labyrinth (CH4)*	44.9
Cold Pursuit (15)*	35	Honey I Shrunk The Kids (BBC 2)	39.2
Rambo: Last Blood (18)	27	The Hangover Part II (Channel 5)	39.0
Frozen 2 (U)	26	Beetlejuice (BBC 1)	37.0
Wonder Park (PG)	26	Terminator II: Judgement Day (CH4)	36.4
Missing Link (PG)	26	There's Something About Mary (ITV2)	36.4
Horrible Histories The Movie – Rotten Romans (PG)*	25	Ride Along (ITV)	35.6
How To Train Your Dragon: The Hidden World (PG)	25	Godzilla (ITV2)	35.4
The Lego Movie 2 (U)	24	The Boss (Film4)	35.1
UglyDolls (U)	24	National Treasure (ITV2)	35.1
35-44 yrs average profile of all films	17	35-44 yrs average profile of all films on TV	13
35-44 yrs in survey population	15	35-44 yrs in total TV audience	10

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 7 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 45-54 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Midsommar (18)	21	Jaws (ITV)	46
Stan & Ollie (PG)*	19	Die Hard 2: Die Harder (Film4)	41
Knives Out (12A)	19	Snow White And The Huntsman (CH4)*	39
The Good Liar (15)*	18	The Wolverine (ITV)	38
Yesterday (12A)*	18	The Last Holiday (Film4)	37
Fisherman's Friends (12A)*	16	Carry On Camping (ITV)*	37
Blinded By The Light (12A)*	16	Evan Almighty (Channel 5)	37
Angel Has Fallen (15)*	16	Bridge Of Spies (ITV)	37
Rambo: Last Blood (18)	16	Happy Feet Two (BBC 1)	37
The Favourite (15)*	15	The Rock (Channel 5)	36
45-54 yrs average profile of all films	10	45-54 yrs average profile of all films on TV	19
45-54 yrs in survey population	12	45-54 yrs in total TV audience	17

Source: CAA Film Monitor, 2019, BARB/TechEdge
Notes:
See notes to Figure 2 and Table 3

Table 8 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 55+ age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Fisherman's Friends (12A)*	68	Lawman (Channel 5)	97
Can You Ever Forgive Me (15)	65	El Dorado (ITV)	94
Downton Abbey (PG)*	64	Hondo (ITV2)	94
Wild Rose (15)*	64	The Cruel Sea (Film4)*	93
Judy (12A)*	58	Nevada Smith (BBC 1)	91
The Good Liar (15)*	56	633 Squadron (Sky 1)*	91
The Favourite (15)*	52	Guns Of The Magnificent Seven (ITV4)	91
Mary Queen of Scots (15)*	50	Half A Sixpence (Film4)*	90
Little Women (U)	50	In Which We Serve (ITV4)*	89
Stan & Ollie (PG)*	46	Fire Down Below (Film4)	89
55 yrs+ average profile of all films	14	55 yrs+ average profile of all films on TV	50
55 yrs+ in survey population	35	55 yrs+ in total TV audience	57

Source: CAA Film Monitor, 2019, BARB/TechEdge
Notes:
See notes to Figure 2 and Table 3

FILM PREFERENCES BY GENDER

Tables 9 and 10 show the top 10 films with the highest audience profile by gender for films in the cinema and on TV during 2019. There is a close-to-even split between males and females in the overall cinema audience, but whilst females make up 55% of the overall TV audience, they only account for 50% of the audience for films on TV.

The films with the largest proportion of females in their audience, both at the cinema and on TV, typically have some mix of female-led narratives, strong romantic or dramatic elements and often highly identifiable female protagonists. At the cinema six of the top 10 skewing female films were UK films.

By contrast, the top 10 male skewing films includes only three UK titles. Films with majority male audiences were generally action-orientated genre films with male-led narratives. Westerns dominated the list of the most male skewing films broadcast on TV.

Table 9 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of female viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Judy (12A)*	80	Love Again (ITV2)	87
Wild Rose (15)*	77	Woman On The Edge (ITV2)	83
What Men Want (15)	76	Step Up 3 (ITV2)	81
Cats (U)*	74	The Fault In Our Stars (Channel 5)	80
Last Christmas (12A)*	74	Family Secrets (Film4)	80
Little Women (U)	73	Never Been Kissed (Film4)	80
Frozen 2 (U)	72	27 Dresses (ITV4)	79
Hustlers (15)	70	Locked Away (ITV)	79
Downton Abbey (PG)*	70	My Big Fat Greek Wedding 2 (ITV2)	79
Aladdin (PG)*	69	Magic Mike XXL (ITV2)	79
Females (7yrs+) average profile of all films	50	Females (7yrs+) average profile of all films on TV	50
Females (7yrs+) in survey population	51	Females (7yrs+) in total TV audience	55

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 10 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of male viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
John Wick: Chapter 3 - Parabellum (15)	74	Lawman (Channel 5)	84
Le Mans ‘66 (12A)	74	Get Carter (BBC 2)*	78
Hellboy (15)*	72	The Mechanic (Film4)	77
Cold Pursuit (15)*	71	The Outlaw Josey Wales (ITV2)	76
Zombieland: Double Tap (15)	70	El Dorado (ITV)	76
Rambo: Last Blood (18)	69	Behind Enemy Lines (5Spike)	75
Star Wars: The Rise of Skywalker (12A)*	68	Unforgiven (ITV4)	75
Terminator: Dark Fate (15)	67	Guns Of The Magnificent Seven (ITV4)	74
Alita: Battle Angel (12A)	67	For A Few Dollars More (Film4)	73
Midsommar (18)	66	Enter The Dragon (E4)	73
Males (7yrs+) average profile of all films	50	Males (7yrs+) average profile of all films on TV	50
Males (7yrs+) in survey population	49	Males (7yrs+) in total TV audience	45

Source: CAA Film Monitor, 2019, BARB/TechEdge
Notes:
See notes to Figure 2 and Table 3

FILM PREFERENCES BY SOCIO-ECONOMIC GROUP

Tables 11 and 12 show the top 10 films with the highest audience profile by the two primary socio-economic groups for films in the cinema and on TV during 2019. There is a marked difference in the socio-economic profile of cinema audiences compared to audiences for films on broadcast TV; at the cinema audiences are 63% ABC1, whilst the viewing audience for films broadcast on television is just 43% ABC1.

Films with the strongest C2DE profile tend to be from action-orientated genres like horror (*Annabelle Comes Home*), action (*Bad Boys for Life*), thriller (*Cold Pursuit*) and westerns (*The Outlaw Josey Wales*). Films with a majority ABC1 audience, whilst still having some examples of male-led action genre films like *Drive Angry*, have more of a focus on dramas (e.g. *Knives Out*, *The Favourite* and *Love And Friendship*).

Table 11 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of ABC1 viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Knives Out (12A)	82	Love And Friendship (BBC 2)	76
Once Upon A Time In… Hollywood (18)	82	La La Land (Film4)	74
Blinded By The Light (12A)*	81	Borg Vs McEnroe (Channel 5)	73
Vice (15)	80	Johnny English Reborn (ITV3)*	71
The Favourite (15)*	80	Sliding Doors (ITV)	71
Judy (12A)*	79	Despicable Me 2 (CH4)	70
The Good Liar (15)*	78	Dodgeball: A True Underdog Story (ITV)	69
Downton Abbey (PG)*	78	2001: A Space Odyssey (Film4)	69
Can You Ever Forgive Me (15)	77	Drive Angry (BBC 2)	69
Ad Astra (12A)	77	A United Kingdom (ITV2)*	68
ABC1 (7yrs+) average profile of all films	63	ABC1 (7yrs+) average profile of all films on TV	43
ABC1 (7yrs+) in survey population	54	ABC1 (7yrs+) in total TV audience	46

Source: CAA Film Monitor, 2019, BARB/TechEdge
Notes:
See notes to Figure 2 and Table 3

Table 12 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of C2DE viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Annabelle Comes Home (15)	60	Police Academy 4: Citizens On Patrol (Film4)	88
Bad Boys For Life (15)	58	The Outlaw Josey Wales (ITV2)	85
UglyDolls (U)	57	The Searchers (Film4)	83
Blue Story (15)*	52	Bend Of The River (Film4)	83
Wonder Park (PG)	51	Hummingbird (5STAR)	82
Long Shot (15)	51	Enter The Dragon (E4)	82
Rambo: Last Blood (18)	50	Cahill, U.S. Marshal (Film4)	81
Terminator: Dark Fate (15)	50	Robin Hood Prince Of Thieves (CH4)*	81
Cold Pursuit (15)*	49	Dead Man's Shoes (Film4)*	81
Fast & Furious: Hobbs & Shaw (12A)*	49	El Dorado (ITV)	81
C2DE (7yrs+) average profile of all films	37	C2DE (7yrs+) average profile of all films on TV	57
C2DE (7yrs+) in survey population	46	C2DE (7yrs+) in total TV audience	54

Source: CAA Film Monitor, 2019, BARB/TechEdge
Notes:
See notes to Figure 2 and Table 3

FILM PREFERENCES BY NATION

Tables 13 through 15 show the top 10 films with the highest % profile by three nations for films in the cinema and on TV during 2019. Note that Northern Ireland is not included as the UK CAA Film Monitor survey does not cover Northern Ireland. No nation substantially over- or under-indexes as having a heavy or light film viewing population compared to the other nations, e.g. English residents make up 84% of the overall population, 84% of the overall cinema audience, 84% of the audience of films on TV, and 83% of the overall TV audience.

Across the top 10 rankings all three nations feature a mix of genre types but there is evidence of nations seeking films which represent / depict themselves on screen. This is most notable in Scotland where the two films at the cinema with the heaviest Scottish profile were also set locally (*Wild Rose* and *Mary Queen of Scots*), along with another TV showing for The Proclaimers jukebox musical *Sunshine on Leith*, which makes the list for the third year running.

As mentioned above, Northern Ireland is not included in these tables but the films on TV with the strongest Northern Irish profile were *The Equalizer* (Film4, 12%), *Uncle Buck* (Channel 5, 11%), *Paddington* (CH4, 10%), *Herbie: Fully Loaded* (Channel 5, 10%) and *The Other Woman* (ITV2, 9%).

Table 13 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of English viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
The Aeronauts (PG)*	92	Guardians Of The Galaxy (Film4)*	99
The Hustle (12A)	91	Pirates Of The Caribbean: On Stranger Tides (Film4)*	98
Wonder Park (PG)	91	Robot And Frank (Film4)	98
Glass (15)	90	Pan (Film4)*	97
Charlie's Angels (12A)	90	Having You (ITV2)*	97
Terminator: Dark Fate (15)	90	Spooks: The Greater Good (ITV4)*	97
Stan & Ollie (PG)*	90	The Full Monty (Channel 5)*	96
Bad Boys For Life (15)	89	Mary Shelley's Frankenstein (ITV)*	96
Shazam! (12A)	89	Fast & Furious 6 (Channel 5)*	96
Avengers: Endgame (12A)*	88	What A Girl Wants (ITV2)*	96
England (7yrs+) average profile of all films	84	England (7yrs+) average profile of all films on TV	83
England (7yrs+) in survey population	84	England (7yrs+) in total TV audience	84

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 14 Films with significant above-average audience profile amongst Scottish viewers (7yrs+), 2019 top films in cinema and on television

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Wild Rose (15)*	18	Gremlins (Channel 5)	29
Mary Queen of Scots (15)*	15	Hotel Transylvania (ITV2)	27
Spies In Disguise (PG)	13	Behind Enemy Lines (5Spike)	25
Yesterday (12A)*	13	Sunshine On Leith (ITV4)*	23
Knives Out (12A)	12	Shawshank Redemption (ITV2)	22
Green Book (12A)	12	Philomena (Film4)*	22
Dora and the Lost City of Gold (PG)*	12	The Rock (5USA)	21
Maleficent: Mistress of Evil (PG)*	11	The Heat (ITV2)	21
The Kid Who Would Be King (PG)*	11	The Golden Compass (CH4)*	21
Men in Black: International (12A)*	11	Jurassic Park III (CH4)	21
Scotland (7yrs+) average profile of all films	8	Scotland (7yrs+) average profile of all films on TV	8
Scotland (7yrs+) in survey population	8	Scotland (7yrs+) in total TV audience	9

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 15 Films with significant above-average audience profile amongst Welsh viewers (7yrs+), 2019 top films in cinema and on television

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Can You Ever Forgive Me (15)	15	Carry On Abroad (Film4) *	19
Gemini Man (12A)	14	The Dressmaker (ITV4)	18
Dora and the Lost City of Gold (PG)*	14	The Iceman (BBC 2)	17
Ad Astra (12A)	14	Black Beauty (BBC 2) *	16
UglyDolls (U)	14	The Heat (ITV2)	15
Knives Out (12A)	14	The Last Stand (E4)	15
Stephen King's Doctor Sleep (15)	13	The Love Punch (Film4)	15
Horrible Histories The Movie – Rotten Romans (PG)*	13	John Wick (Film4)	14
Annabelle Comes Home (15)	13	The Love Punch (Film4)	14
Hustlers (15)	13	Need For Speed (Film4)	14
Wales (7yrs+) average profile of all films	8	Wales (7yrs+) average profile of all films on TV	5
Wales (7yrs+) in survey population	8	Wales (7yrs+) in total TV audience	5

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

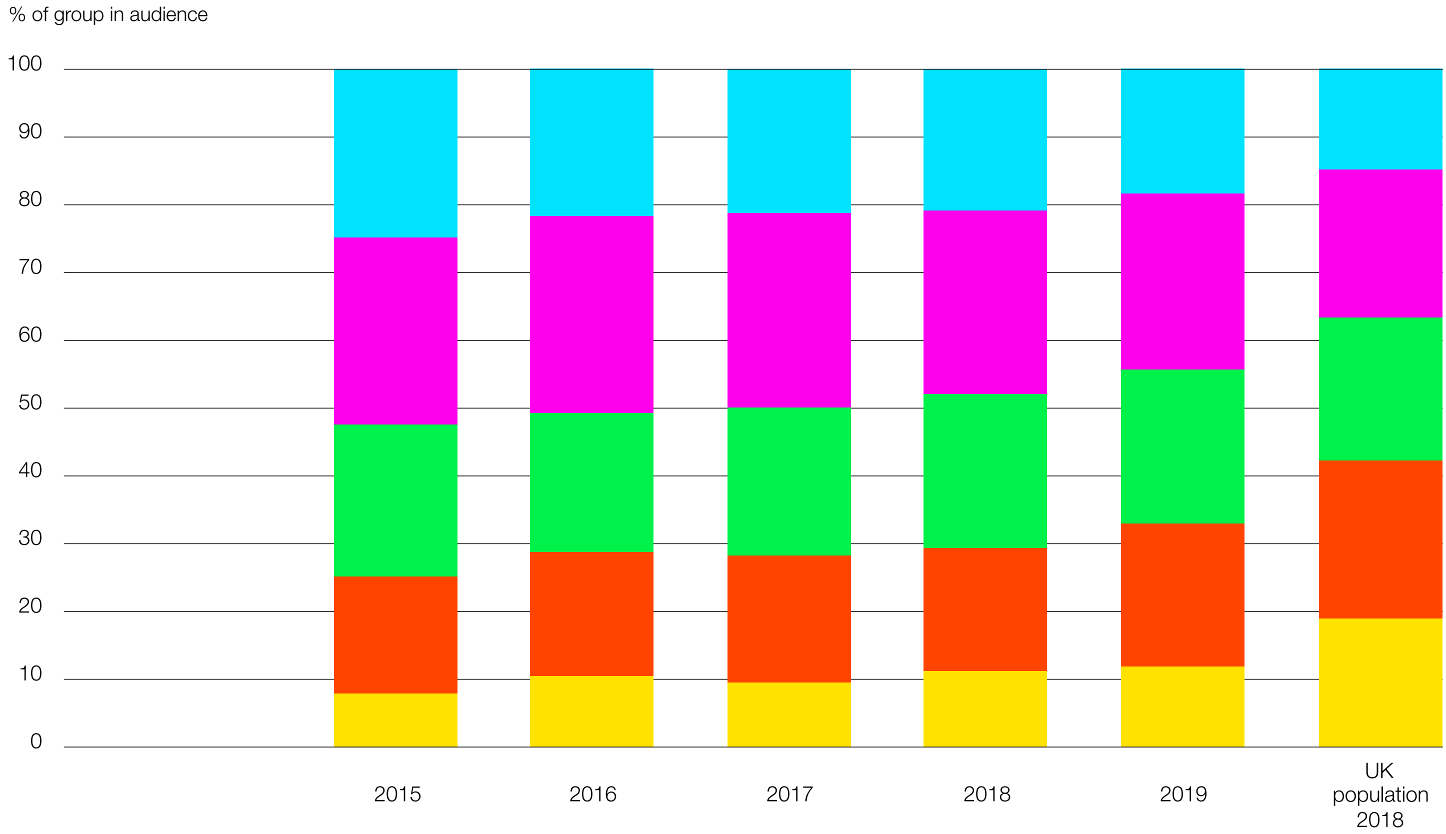
See notes to Figure 2 and Table 3

SUBSCRIPTION VIDEO ON DEMAND

There has been rapid take-up of SVoD services in the UK in recent years, with over 14 million households having access to one or more these services in 2019 (see the Film On Digital Video chapter). Figure 7 demonstrates that whilst the age profile of SVoD users has gradually moved to be more representative of the UK population, users still skew young in comparison with the general population. In 2019, users aged 18-34 made up 44% of the SVoD audience compared with 37% for the UK population as a whole, but this difference is gradually diminishing as penetration increases.

In terms of socio-economic status, the overall SVoD audience skews slightly more ABC1 than the general population, but this difference has also been decreasing with growing take-up, with only a 3% point difference between the 2019 SVoD ABC1 profile and the UK population. The gender balance has been close to evenly split since 2015, with males making up 49.5% of the audience in 2019, relatively unchanged from the previous year.

Figure 7 UK SVoD audience profile by age, 2015-2019



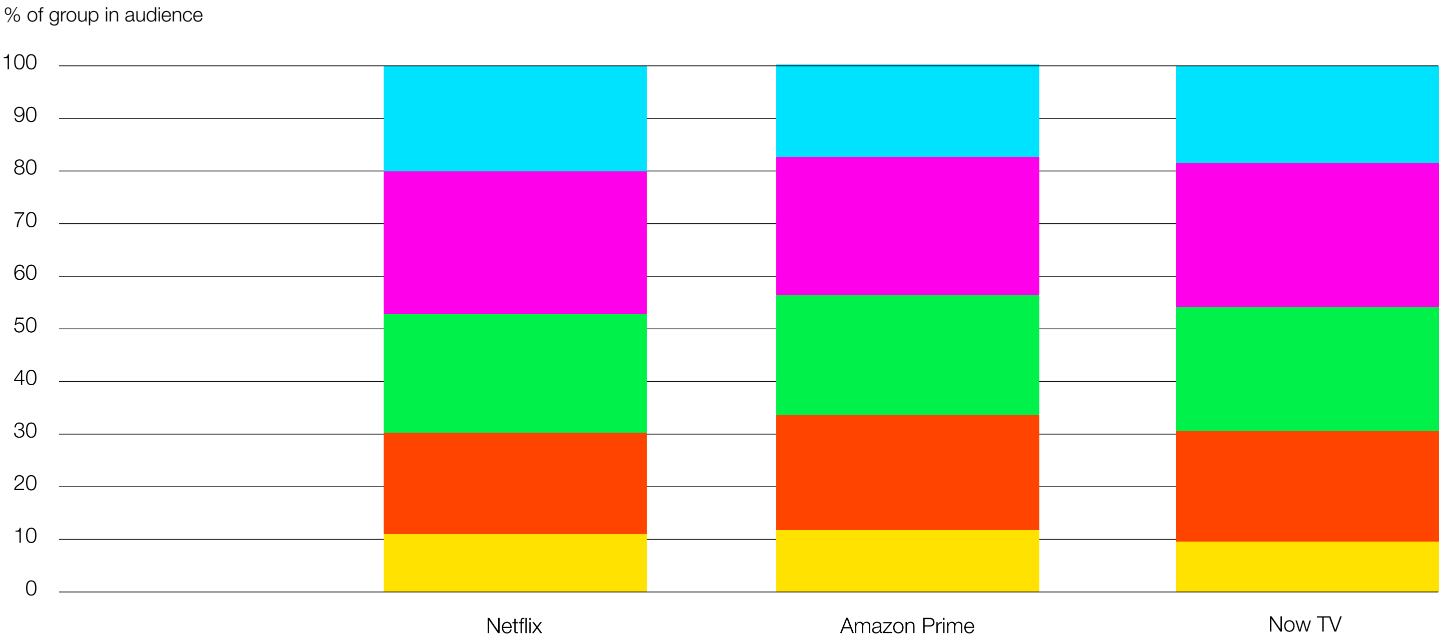
	2015	2016	2017	2018	2019	UK population 2018
Age 18-24	24.8	21.7	21.2	20.8	18.4	14.9
Age 25-34	27.6	29.1	28.7	27.1	26.0	21.8
Age 35-44	22.4	20.5	21.8	22.7	22.7	21.1
Age 45-54	17.3	18.3	18.8	18.2	21.1	23.3
Age 55-64	7.9	10.5	9.5	11.2	11.9	19.0
Male	53.0	49.9	51.4	50.1	49.5	49.9
ABC1	59.4	62.6	61.0	59.7	57.5	54.4

Source: Ampere Analysis, Consumer Surveys 2015-2019, UK adults (18-64). Base: 2015 (330), 2016 (794), 2017 (2,188), 2018 (2,474), 2019 (2,909)
Notes:
This profile is for 'all users' and includes those that also watch television programmes as well as the films available on these services.
* UK population based on sample breakdown weighted to represent 18-64 year olds.

USER PROFILE FOR SELECTED SVOD SERVICES

Whilst there is a growing number of subscription on-demand and streaming services available to UK audiences, in 2019 the three main providers continued to be Netflix, Amazon Prime Video and Now TV. (Information on reach for these services is shown in the Film On Digital Video chapter.) The audience profile of users is broadly similar for all three services: all three have a slightly more female user profile, and all over-index for the ABC1 socio-economic group (the average ABC1 profile for the three platforms is 60% compared to 54% of the UK population) (Figure 8).

Figure 8 User profile of selected SVoD services in the UK by age, 2019



	Netflix	Amazon Prime	Now TV
Age 18-24	20.1	17.5	18.4
Age 25-34	27.2	26.3	27.5
Age 35-44	22.5	22.8	23.5
Age 45-54	19.3	21.8	21
Age 55-64	10.9	11.7	9.6
Male	47.5	48.2	48.5
ABC1	60.5	60.6	57.4

Source: Ampere Analysis, Consumer Surveys 2019, UK adults (18-64).

Notes:

This profile is for 'all users' and includes those that also watch television programmes as well as the films available on these services.

FILM PREFERENCES ON SVOD PLATFORMS

Tables 16-20 show the top 10 titles with the highest profile by age group and gender (as % of all adults 18yrs +) for films available to stream on Netflix, Amazon Prime and Now TV in 2019. Note these tables do not represent the films seen by the largest number of viewers within the gender or age group, but rather the films whose audience, regardless of size, delivered the highest proportion as a % of all adults (18yrs +) by each demographic sub-group.

Differences in preference by gender for films streamed through SVoD platforms mirror those of audiences for films shown at the cinema or on television (Tables 16 and 17). Female viewers over-index in the audience for films with strong female characters, romances and family friendly films, while male viewers over-index in the audience for action-driven titles.

As expected from the overall SVoD user profiles described above, younger age groups make up the largest proportion of the audience for film on SVoD, with the 18-34 year old age group accounting for 44% of the total time spent watching film on SVoD. In 2019 *Shrek* was the film title with the highest proportion of its audience from this group (83%). Other family favourites like *Hotel Translyvania* and *How the Grinch Stole Christmas* also made their top 10 list.

Table 16 Top 10 films by highest % profile of women on SVoD platforms, 2019

	% of audience who are women
To All the Boys I Loved Before	97
The Holiday	93
Hotel Transylvania	92
A Simple Favour	92
How the Grinch Stole Christmas	91
Isn't It Romantic	91
Pitch Perfect	91
Mamma Mia!	89
A Christmas Prince	88
The Christmas Chronicles	88
Total film on SVoD	50

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 17 Top 10 films by highest % profile of men on SVoD platforms, 2019

	% of audience who are men
Rogue One: A Star Wars Story	87
Avengers: Age of Ultron	76
Triple Frontier	75
Polar	75
The Irishman	74
Fast & Furious 8	72
The Ballad of Buster Scruggs	71
Shaft (2000)	70
Mission: Impossible - Ghost Protocol	70
The Lord of the Rings: The Two Towers	69
Total film on SVoD	50

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 18 Top 10 films by highest % profile of viewers aged 18-34 on SVoD platforms, 2019

	% of audience who are 18-34
Shrek	83
Hotel Transylvania	79
To All the Boys I Loved Before	79
Pitch Perfect	76
The Knight Before Christmas	75
Twilight (2008)	73
How the Grinch Stole Christmas	72
Pokemon the Movie: I Choose You!	71
The Hangover	70
Despicable Me 3	68
Total film on SVoD	44

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 19 Top 10 films by highest % profile of viewers aged 35-54 on SVoD platforms, 2019

	% of audience who are 35-54
The Commuter	65
Guardians of the Galaxy Vol. 2	57
Matilda	55
Cloudy with a Chance of Meatballs 2	54
Triple Frontier	54
The Lord of the Rings: The Two Towers	53
The Boy in the Striped Pajamas	51
Jack Ryan: Shadow Recruit	50
Dumplin	50
Wine Country	48
Total film on SVoD	37

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 20 Top 10 films by highest % profile of viewers aged 55+ on SVoD platforms, 2019

	% of audience who are 55+
The Equalizer	49
The Ballad of Buster Scruggs	49
The House with a Clock in Its Walls	46
Star Trek Into Darkness	36
The King	35
Jack Ryan: Shadow Recruit	34
The Boy in the Striped Pajamas	34
In the Tall Grass	34
Mamma Mia!	33
The Mummy (2017)	33
Total film on SVoD	19

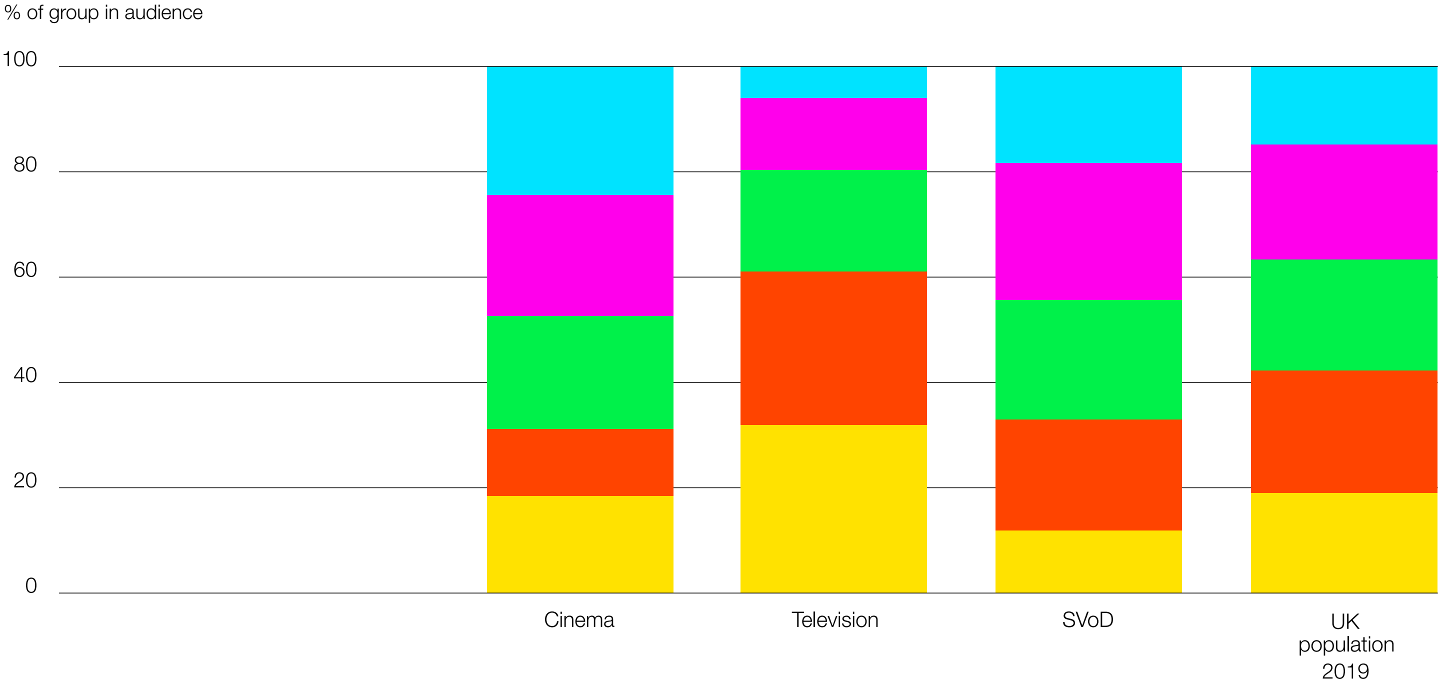
Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

AUDIENCE PROFILE COMPARATIVE ANALYSIS

This chapter has focused on comparing demographic profiles and preferences of the audience for the three most used platforms that show film. However, due to the different methodologies used to collect the data and the different sampling criteria, it is difficult to draw reliable and accurate comparisons between them. Figure 9 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 the SVoD services includes all content watched on these platforms, television series and non-feature documentaries, so is not exclusively based on a 'film-only' audience.

There are points of similarity between the audiences for cinema and SVoD. Compared to the overall population profile both have younger audiences (47% are aged 18-34 years old in the cinema audience, and 44% in SVoD), and a higher socio-economic profile (65% are ABC1 in the cinema audience, 58% in SVoD). In contrast to cinema and SVoD audiences, television audiences have an older profile with 61% being in the 45-64 year old age group, and are more C2DE in socio-economic terms, with 56% being C2DE.

Figure 9 Comparative UK audience profiles: cinema, television and SVoD, 2019



	Cinema	Television	SVoD	UK population 2019
Age 18-24	24.4	5.9	18.4	14.9
Age 25-34	22.9	13.7	26.0	21.8
Age 35-44	21.5	19.3	22.7	21.1
Age 45-54	12.8	29.2	21.1	23.3
Age 55-64	18.4	31.9	11.9	19.0
Male*	49.3	49.9	49.5	49.9
ABC1*	64.8	44.5	57.5	54.4

Source: CAA, BARB/TechEdge, Ampere Analysis, BFI analysis

Notes:

CAA data based on all films released in 2019 and captured in the CAA's Film Monitor research. Titles (88), Base (14,106).

BARB/TechEdge data filtered on all titles transmitted on all BARB subscribed channels in 2019.

Ampere Analysis Consumer Survey 2019, Audience profile for all UK SVoD services. UK adults (18-64), Base (2,909).

* Based on adults aged 18-64.

SCREEN SECTOR CERTIFICATION

FACTS IN FOCUS

In 2019, 897 projects with a total production value of £6.9 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 £4.2 billion.

- A total of 375 feature films received final certification as British in 2019, an increase from 347 in 2018. Of these, 363 were films which passed the cultural test and 12 were official co-productions.
- The combined production budget of cultural test films with final certification was £3.7 billion (£3.3 billion in 2018); the combined budget of co-productions with final certification was £46 million (£59 million in 2018).
- Forty cultural test films had budgets of £10 million or over, up from 35 in 2018; 271 cultural test films had budgets of under £2 million, up from 255 in 2018.
- The median budget for cultural test films in 2019 was £0.3 million; the median budget for co-productions was £2.5 million.
- A total of 132 high-end television (HETV) programmes received final certification as British under the cultural test (99 in 2018), with a combined budget of £1.7 billion (£1.4 billion in 2018).
- A total of 59 animation programmes received final certification under the cultural test (57 in 2018), with a combined budget of £124.5 million (£76 million in 2018).
- A total of 81 children's television programmes received final certification under the cultural test (87 in 2018), with a combined budget of £84 million (£89 million in 2018).
- A total of 247 video games received final certification (195 in 2018), with a combined budget of £1.2 billion (£264 million in 2018).

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 have to receive a requisite number of points based on UK or European Economic Area (EEA) cultural elements for content, contribution, hubs and practitioners. A wide range of films qualified as British under the cultural test in 2019, including *Avengers: Endgame, Mary Queen of Scots* and *Men in Black: International.*

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 2019, the UK had 12 active bilateral treaties in place, with Australia, Brazil, Canada, China, France, India, Israel, Jamaica, Morocco, New Zealand, the Occupied Palestinian Territories and South Africa. Official UK co-productions can also be certified under the European Convention on Cinematographic Co-production which allows for both bilateral and multilateral film co-productions. Films which received final co-production certification in 2019 included *The Keeper, Vita & Virginia* and *Yuli: The Carlos Acosta Story.*

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 agreements which allow television co-production. At the end of 2019, these were with Australia, Brazil, Canada, China, Israel, New Zealand, the Occupied Palestinian Territories and South Africa.

HETV programmes receiving final certification in 2019 included *Beecham House* (six episodes), *Four Weddings and a Funeral* (10 episodes) and *Years and Years* (six episodes). Animation and children's television programmes qualifying as officially British included *The Amazing World of Gumball* – Series 6 (44 episodes), *Stwnsh Sadwrn* (seven episodes) and *The Worst Witch* – Series 3 (13 episodes).

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 2019 included *Football Manager 2019 Touch*, *The Grand Tour Game* and *Total War: Warhammer II.*

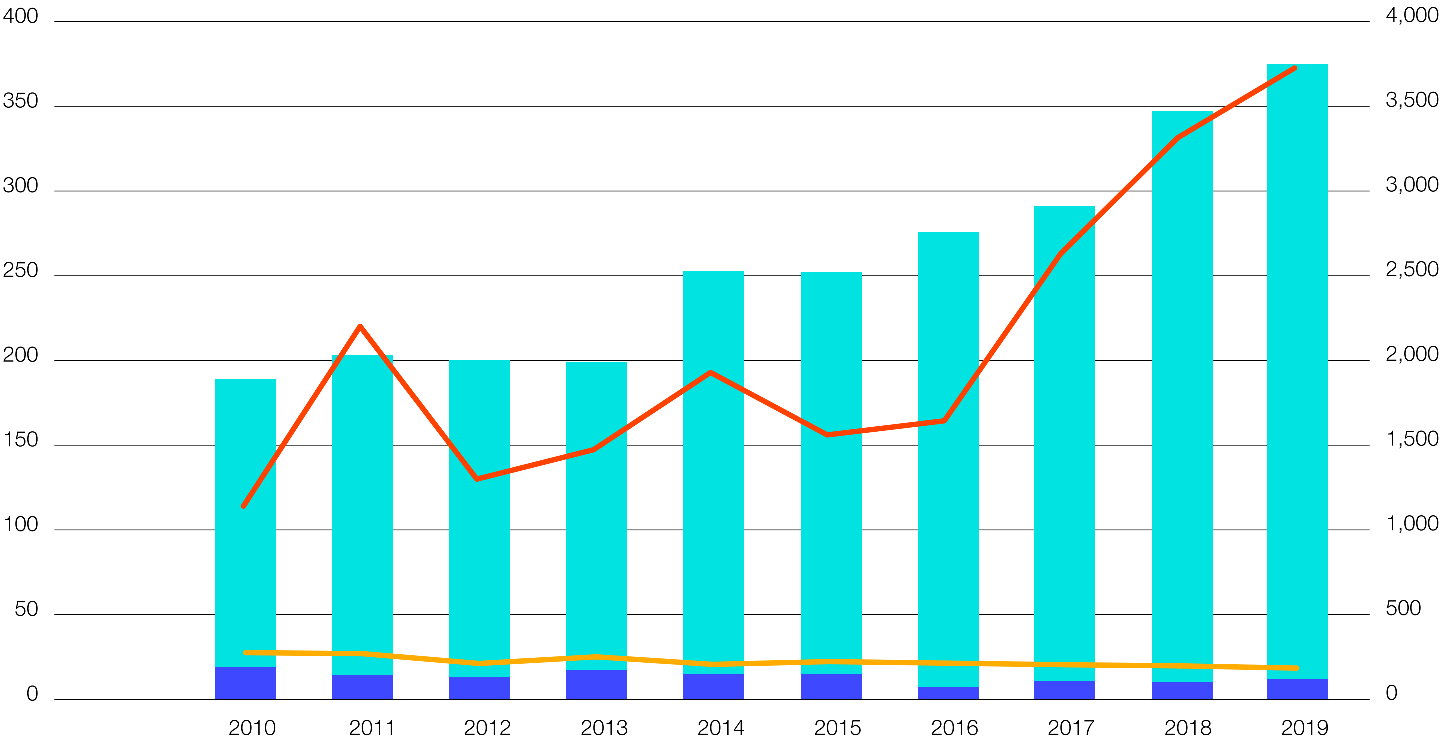
The data for individual years in this chapter are not analogous with the statistics in the Production chapter which cover all film production and UK qualifying television and video games production activity by year of production start. This chapter covers only UK qualifying screen sector productions.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

FILMS WITH FINAL CERTIFICATION, 2010-2019

The number of UK films receiving final certification increased substantially between 2010 and 2019. As Figure 1 shows, the number of finally certified films in 2019 (375) was almost double the total in 2010 (189). There was also a significant upward trend in the overall production value associated with these films, which rose from £1.1 billion in 2010 to £3.8 billion in 2019. This increase, particularly from 2017 onwards, 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, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of final certifications										
Cultural test	170	189	187	182	238	237	269	280	337	363
Co-production	19	14	13	17	15	15	7	11	10	12
Total	**189**	**203**	**200**	**199**	**253**	**252**	**276**	**291**	**347**	**375**
Production budget (£ million)										
Cultural test	1,001.7	2,118.3	1,169.7	1,353.4	1,832.6	1,444.0	1,532.8	2,573.4	3,291.4	3,724.7
Co-production	137.4	131.4	73.5	112.7	68.2	84.6	75.4	66.2	59.4	46.2
Total	**1,139.1**	**2,249.7**	**1,243.2**	**1,466.1**	**1,900.8**	**1,528.6**	**1,608.2**	**2,639.6**	**3,350.8**	**3,770.9**

Source: DCMS, BFI

Notes:

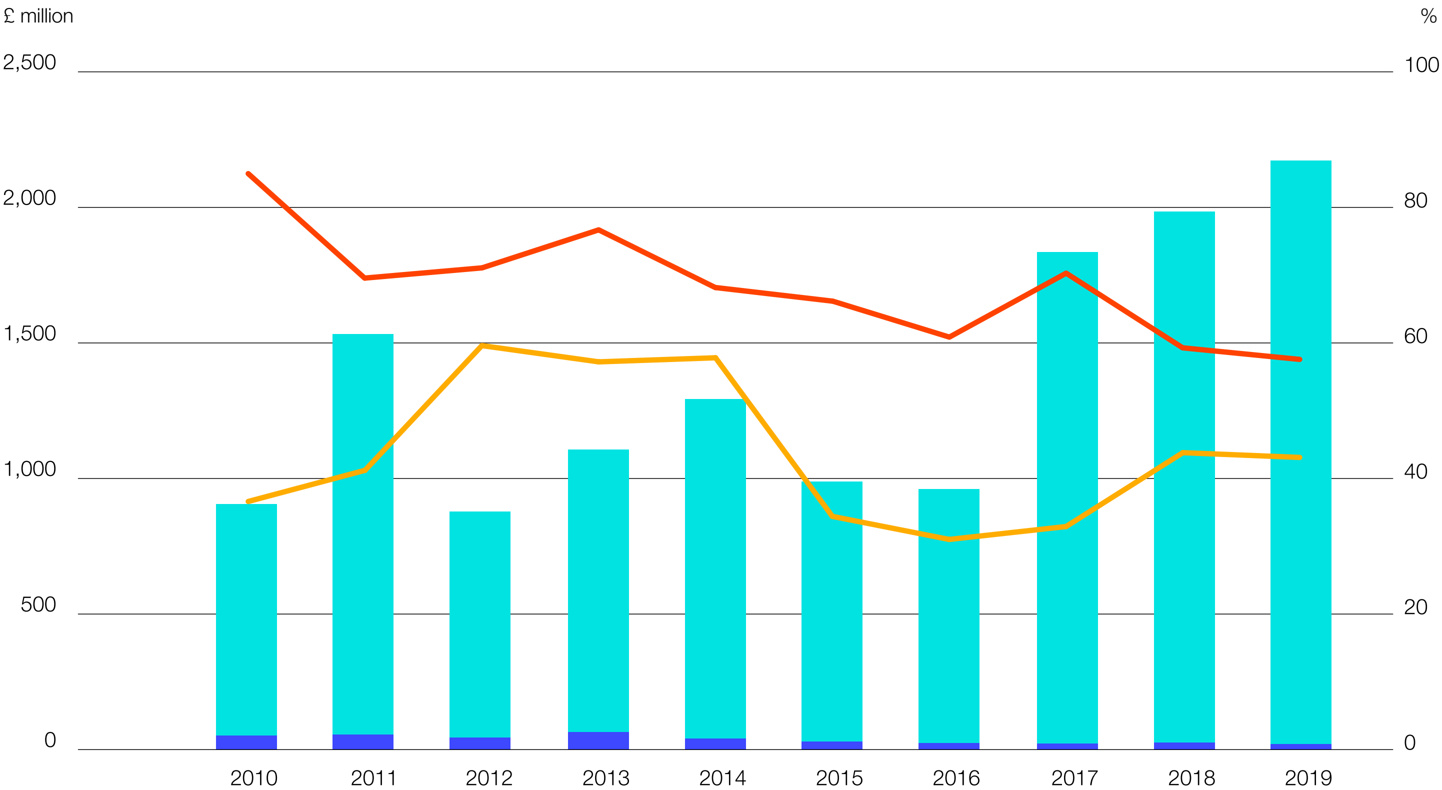
Total production budget is the sum of production activity in the UK and production activity outside the UK for cultural test films and total investment for co-productions.

Data updated since publication of the 2019 Statistical Yearbook.

Figure 2 shows the levels of UK spend associated with films receiving final certification between 2010 and 2019. (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. The rise in overall UK production value is mainly due to the increase in the number of big budget films being certified under the cultural test. In 2019, the UK spend of certified films reached a record high of £2.2 billion.

As a share of total production budget, the UK spend of cultural test films has seen an overall downward trend from a high of 85% in 2010 to a low of 58% in 2019. The trends for co-productions are more unpredictable due to the small numbers of productions. In 2019, co-productions accounted for only 1% of the overall UK spend of films with final certification, compared with 6% in 2010.

Figure 2 UK spend of films with final certification and UK spend as % of total budget, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK spend (£ million)										
Cultural test	853.8	1,478.5	834.2	1,041.2	1,252.8	959.0	936.3	1,813.6	1,958.1	2,151.9
Co-production	51.3	55.0	44.3	65.3	40.0	29.7	23.9	22.2	26.4	20.2
Total	**905.1**	**1,533.5**	**878.5**	**1,106.4**	**1,292.8**	**988.7**	**960.2**	**1,835.8**	**1,984.6**	**2,172.1**
UK spend as % of total production budget										
Cultural test	85.2	69.8	71.3	76.9	68.4	66.4	61.1	70.5	59.5	57.8
Co-production	37.3	41.9	60.3	57.9	58.5	35.1	31.7	33.6	44.5	43.8

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 2019 Statistical Yearbook.

BUDGET DISTRIBUTION OF FILMS WITH FINAL CERTIFICATION, 2010-2019

Table 1 shows the median budgets of films receiving final certification between 2010 and 2019. Median budgets for cultural test films have been fairly consistent over the period, ranging each year between £300,000 and £500,000. The median budget for co-productions has been more varied, peaking in 2017 at £5.7 million and with a low of £2.5 million in 2019. This fluctuation is a result of the relatively small volume of co-production activity, as with low numbers the median is more susceptible to the effects of individual budgets.

Table 1 Median budgets of films with final certification, 2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cultural test (£ million)	0.4	0.5	0.4	0.4	0.4	0.4	0.3	0.3	0.3	0.3
Co-production (£ million)	4.4	3.8	2.8	3.7	4.0	3.8	4.8	5.7	4.1	2.5

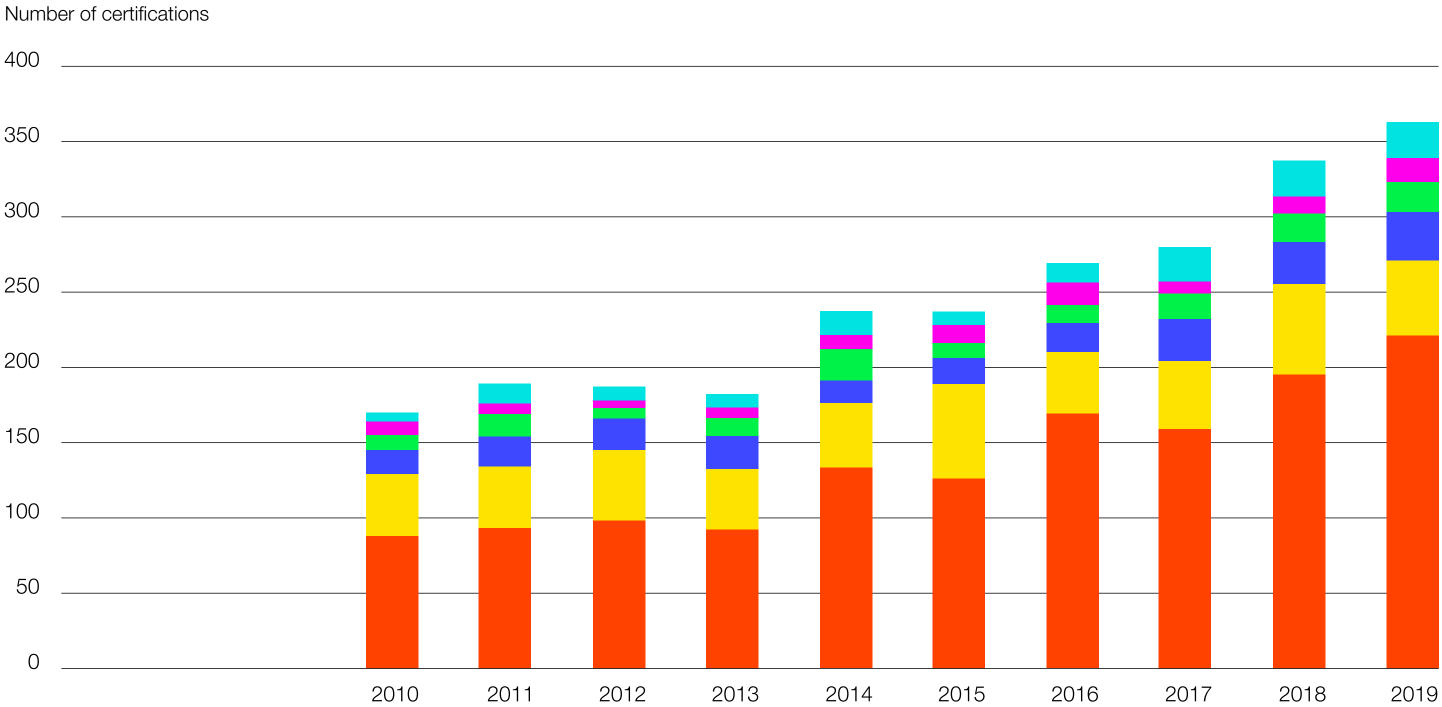
Source: DCMS, BFI

See note to Figure 1.

Figure 3 shows the breakdown of films receiving final cultural test certification by budget band. While the number of certifications for cultural test films rose across all budget bands over the period, the greatest increases are seen in films at the highest and lowest ends of the budget scale. Certifications for films with budgets of £30 million or over increased by 300% between 2010 and 2019, rising from six to 24, while certifications for films with budgets of less than £500,000 increased from 88 to 221, a rise of 151%.

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, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
≥£30 million	6	13	9	9	16	9	13	23	24	24
£10-£29.9 million	9	7	5	7	9	12	15	8	11	16
£5-£9.9 million	10	15	7	12	21	10	12	17	19	20
£2-£4.9 million	16	20	21	22	15	17	19	28	28	32
£0.5-£1.9 million	41	41	47	40	43	63	41	45	60	50
<£0.5 million	88	93	98	92	133	126	169	159	195	221
Total	**170**	**189**	**187**	**182**	**237**	**237**	**269**	**280**	**337**	**363**

Source: DCMS, BFI

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 80% of the aggregate budget, while the 75% of films with budgets of* under £2 million accounted for only 3% of the aggregate budget.

Table 2 Films with final cultural test certification, distribution by budget band, 2010-2019

Budget band	Number	% number	Total budget (£ million)	% budget
≥£30 million	146	6.0	16,072.0	80.2
£10-£29.9 million	99	4.0	1,556.0	7.8
£5-£9.9 million	143	5.8	1,031.6	5.1
£2-£4.9 million	218	8.9	703.9	3.5
£0.5-£1.9 million	471	19.2	467.2	2.3
<£0.5 million	1,374	56.1	211.2	1.1
Total	**2,451**	**100.0**	**20,041.9**	**100.0**

Source: DCMS, BFI

The budgets for co-productions with final certifications between 2010 and 2019 are more evenly distributed than for cultural test films (Table 3). The majority of the aggregate budget (65%) is associated with films in the £5-£29.9 million range, whereas films budgeted at £30 million or over account for only 14% of the total budget, compared with 80% for cultural test films. The table also highlights the small proportion of films with budgets of less than £500,000 (9%) compared with cultural test films (56%).

Table 3 Films with final co-production certification, distribution by budget band, 2010-2019

Budget band	Number	% number	Total budget (£ million)	% budget
≥£30 million	3	2.3	120.1	14.1
£10-£29.9 million	21	15.8	337.2	39.5
£5-£9.9 million	30	22.6	218.1	25.5
£2-£4.9 million	42	31.6	146.6	17.1
£0.5-£1.9 million	25	18.8	29.7	3.5
<£0.5 million	12	9.0	3.1	0.4
Total	**133**	**100.0**	**854.8**	**100.0**

Source: DCMS, BFI

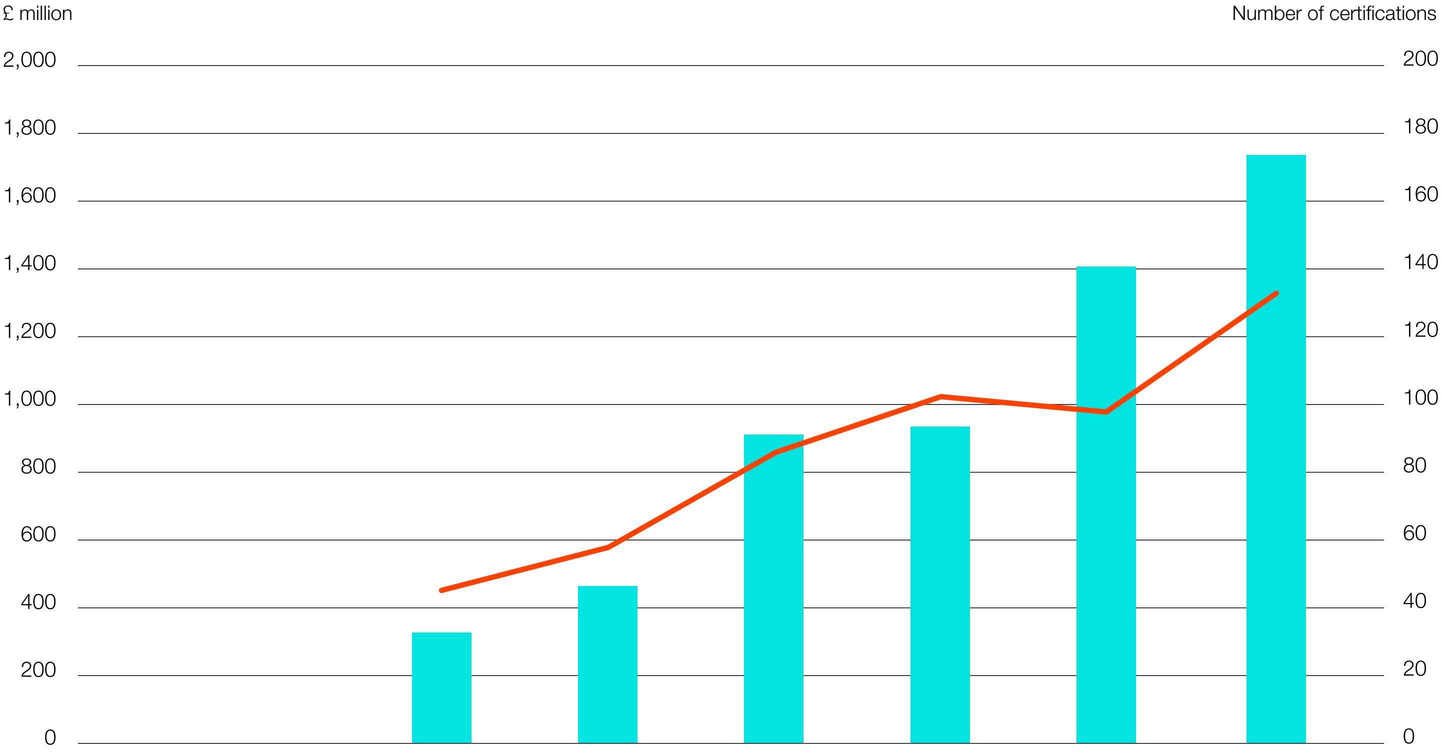
Note: Figures/percentages may not sum to totals due to rounding.

HIGH-END TELEVISION (HETV) PROGRAMME FINAL CERTIFICATIONS, 2014-2019

The number of HETV productions receiving final certification as British under the cultural test increased each year between 2014 and 2019 with the exception of 2018 which saw a slight fall on the previous year (Figure 4). In 2019, a record 132 qualifying HETV productions received final certification, up from 99 projects in 2018. The total production budget associated with these projects increased from £1.4 billion in 2018 to £1.7 billion, also a record high for the period.

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, 2014-2019



	2014	2015	2016	2017	2018	2019
Production budget (£ million)	326.9	464.7	911.5	935.1	1,406.3	1,736.1
Number of final certifications	44	58	83	103	99	132

DCMS, BFI

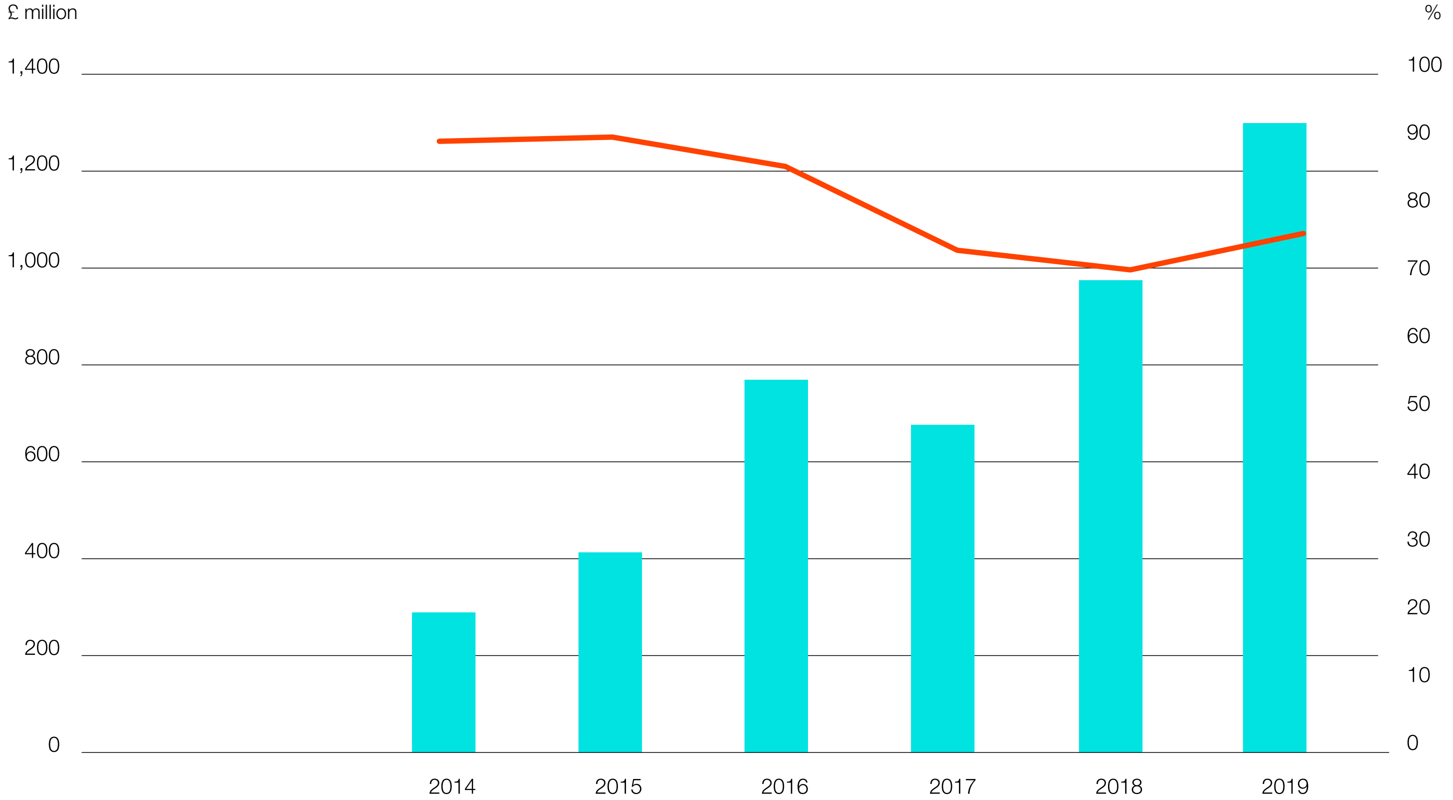
Notes:

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

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.

Figure 5 shows the total annual UK spend associated with HETV projects certified under the cultural test between 2014 and 2019. There has been an overall upward trend in the level of spend, with an increase from £288 million in 2014 to a record £1.3 billion in 2019. As a percentage of total budget, UK spend decreased from a high of 89% in 2015 to 75% in 2019, 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, 2014-2019



	2014	2015	2016	2017	2018	2019
UK spend (£ million)	288.2	412.7	768.9	675.5	974.7	1,299.1
UK spend as % of total budget	88.2	88.8	84.4	72.2	69.3	74.8

Source: DCMS, BFI

Note: A production can be a single programme or a television series.

Image: *Years and Years* courtesy of Red Production Company/BBC/HBO

For the majority of the period (2014-2017), the average median budget per minute of HETV productions receiving final certification under the cultural test was around £22,000 (Table 4). In both 2018 and 2019, however, the median budget per minute increased to over £25,000.

Table 4 Median budgets of HETV productions with final cultural test certification, 2014-2019

Year	Median budget per minute (£)
2014	21,757
2015	21,203
2016	22,818
2017	22,764
2018	25,721
2019	25,027

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.

ANIMATION TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2014-2019

As Table 5 shows, 59 animation television productions received final certification as British under the cultural test in 2019, up slightly up from 57 projects in 2018, and the highest number of the period, 2014-2019. The total production budget for animations certified under the cultural test also reached a high in 2019 at £124.5 million (up from £76 million in 2018), while the associated UK production value increased from £52.5 million in 2018 to a high of £89 million. In 2019, the UK spend for these projects as a percentage of total budget was 71%, the third lowest share of the period.

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 2019, the median budget per minute was £7,270.

Table 5 Animation television productions with final cultural test certifications, 2014-2019

	2014	2015	2016	2017	2018	2019
Number	14	51	38	39	57	59
Total budget (£ million)	21.5	86.4	62.2	50.2	76.0	124.5
UK spend (£ million)	10.6	62.2	44.5	42.8	52.5	88.6
UK spend as % of total budget	49.0	72.0	71.6	85.4	69.1	71.2
Median budget per minute (£)	7,327	7,000	8,548	3,836	7,426	7,270

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.

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.

CHILDREN'S TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2016-2019

The volume and value of children's television productions with final cultural test certification increased substantially between 2016 and 2018, but fell slightly in 2019 (Table 6). The number of certifications decreased from 87 in 2018 to 81 in 2019, while the total production budget associated with these projects decreased from £89 million to £84 million. The decline in UK production value was less steep, falling from £86 million to £83 million. 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 2019 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 the other production categories. In 2019, the median budget per minute was £2,336.

Table 6 Children's television productions with final cultural test certifications, 2016-2019

	2016	2017	2018	2019
Number	36	65	87	81
Production budget (£ million)	25.4	49.9	89.1	83.7
UK spend (£ million)	25.0	46.2	86.2	82.6
UK spend as % of total budget	98.5	92.6	96.8	98.7
Median budget per minute (£)	1,952	1,793	2,028	2,336

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.

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.

VIDEO GAME FINAL CERTIFICATIONS, 2015-2019

A record 247 video game projects received final certification as British in 2019, up from 195 in 2018 and more than double the number in 2015 (Table 7). The total budget for these projects was £1.2 billion, up from £264 million in 2018, while the associated UK spend was £583 million, up from £202 million in 2018. The large increase in the value of these projects in 2019 is partly down to a small number of very high budget international projects receiving certification in the year. The UK spend as a percentage of total budget for qualifying video games projects was 50% in 2019, down from 76.5% in 2018.

The median budget for video games with final certification in 2019 was £148,725.

Table 7 Video games with final certification, 2015-2019

	2015	2016	2017	2018	2019
Number	116	189	212	195	247
UK spend (£ million)	180.9	202.2	248.7	202.0	582.6
Total budget (£ million)	265.6	224.4	277.5	263.9	1,161.6
UK spend as % of total budget	68.1	90.1	89.6	76.5	50.2
Median budget	110,902	171,584	142,425	180,490	148,725

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.

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.

SCREEN SECTOR PRODUCTION

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.

Cover image: *Louis Wain* courtesy of StudioCanal

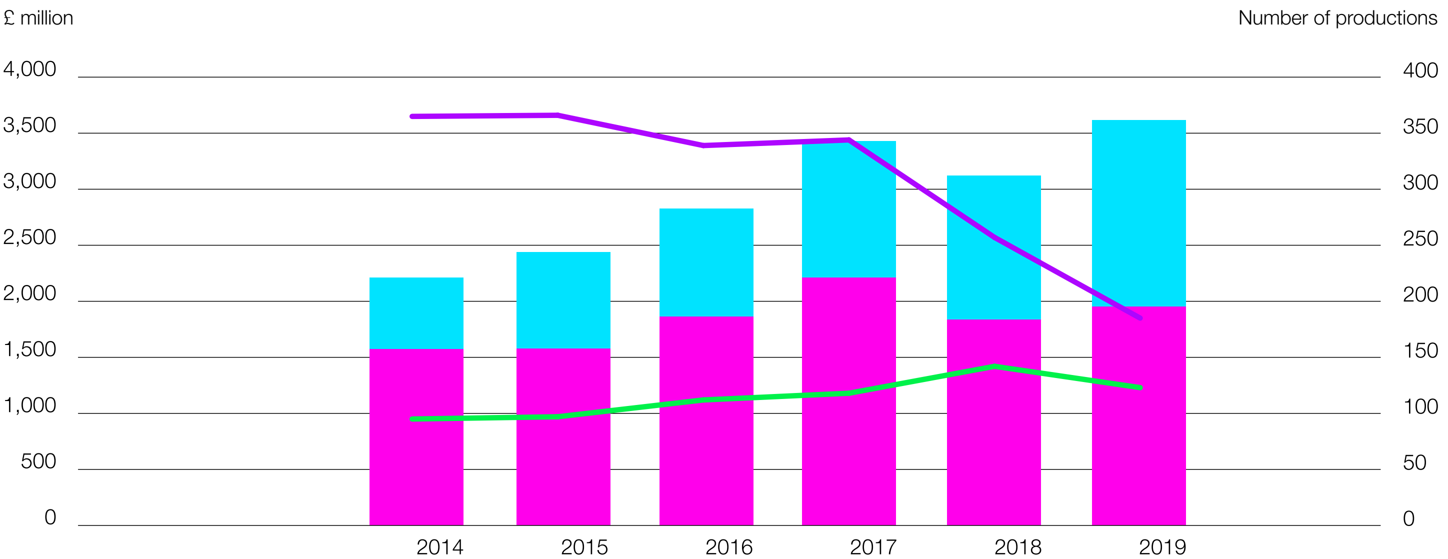
SCREEN SECTOR PRODUCTION

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

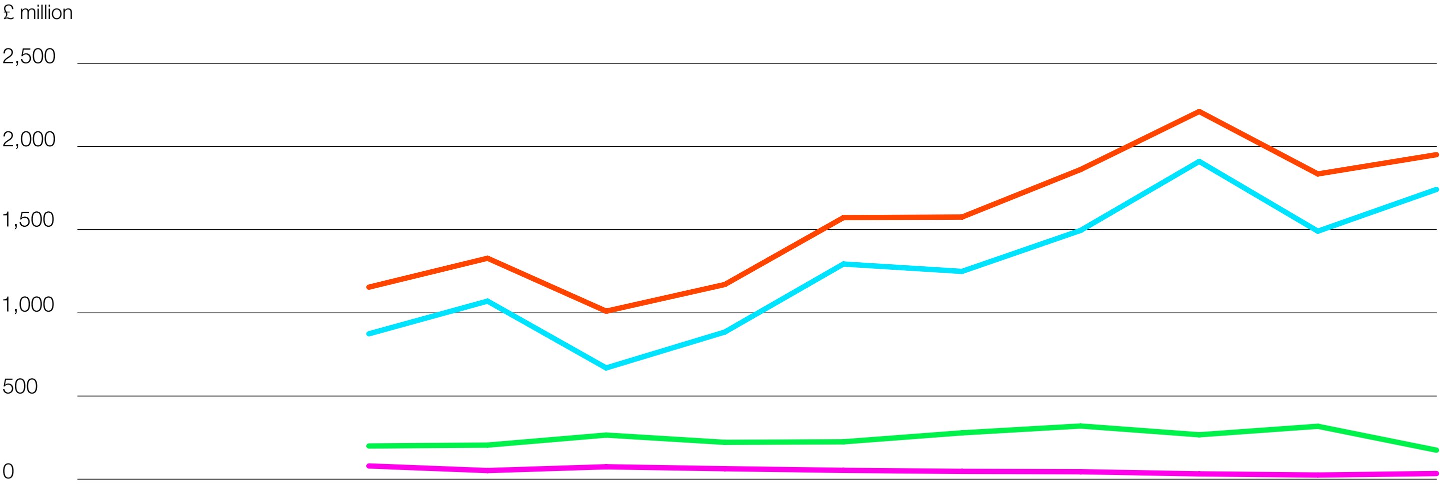
As Figure 2 shows, the aggregate UK spend of feature films that commenced principal photography in 2019 was £1.95 billion, up 6% on 2018 and second only to the high of £2.21 billion achieved in 2017. This was the sixth consecutive year to see record or near-record values for UK film production activity. 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.

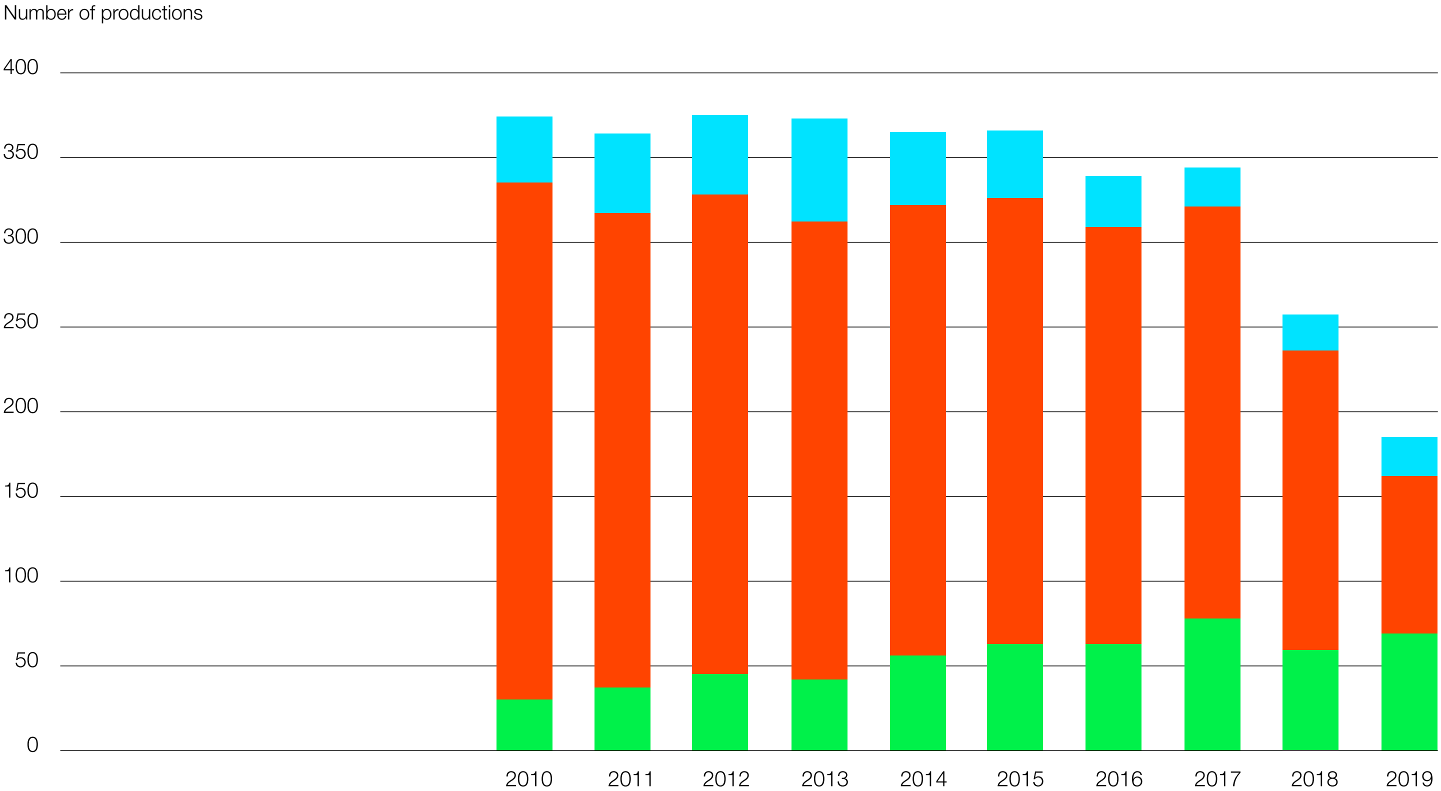
Data updated since publication of the 2019 Statistical Yearbook.

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**

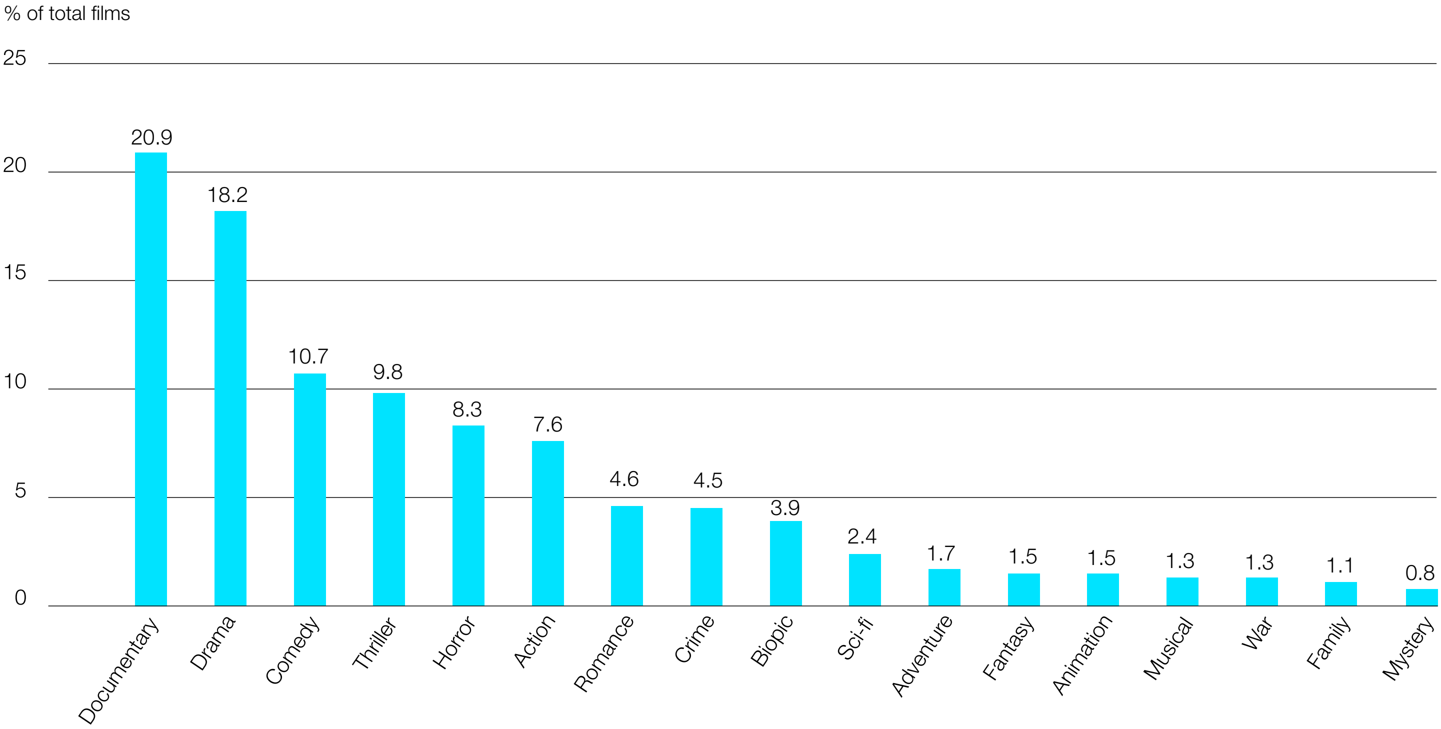
Source: BFI

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

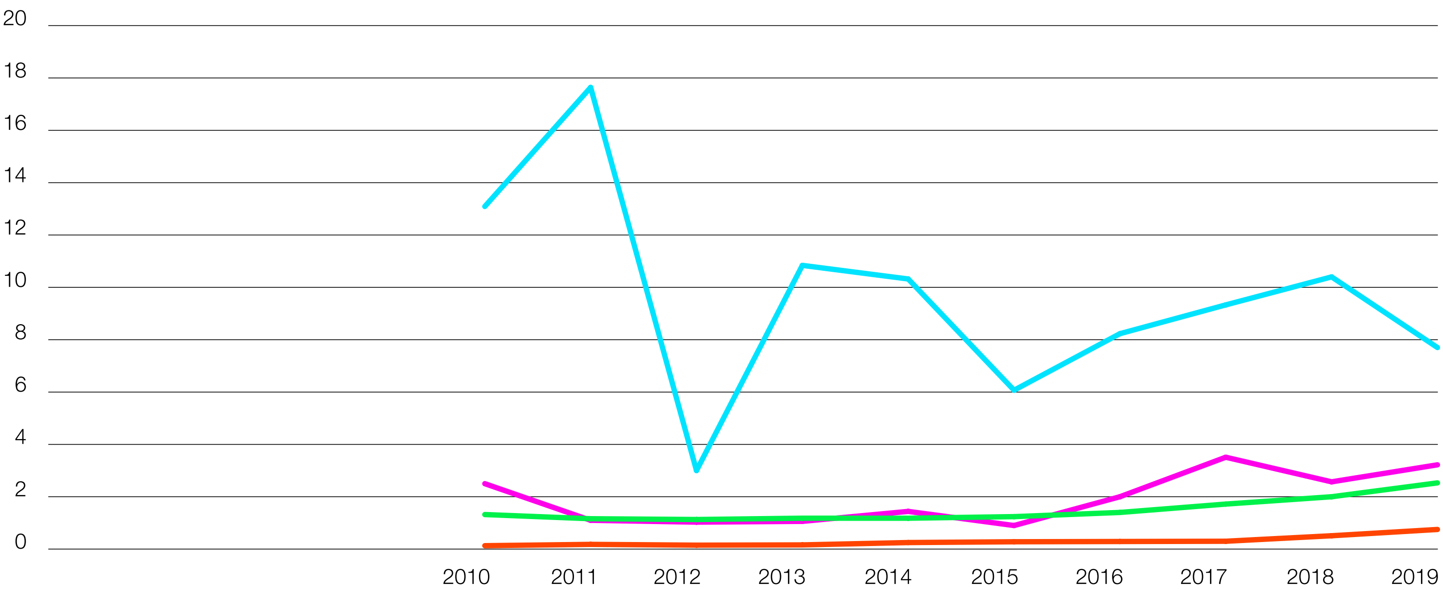
Figure 5 shows the median budget for inward investment films, co-productions and domestic UK features between 2010 and 2019. It also includes data on median budgets for domestic UK films excluding those with budgets of less than £500,000.

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

Budget band	Number of films	Total budget in band (£ million)	% of total budget
≥£5 million	6	39.6	49.8
£2-£4.9 million	12	40.3	41.5
£0.5-£1.9 million	5	3.8	7.5
<£0.5 million		0.6	1.2
Total	**23**	**84.3**	**100.0**

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

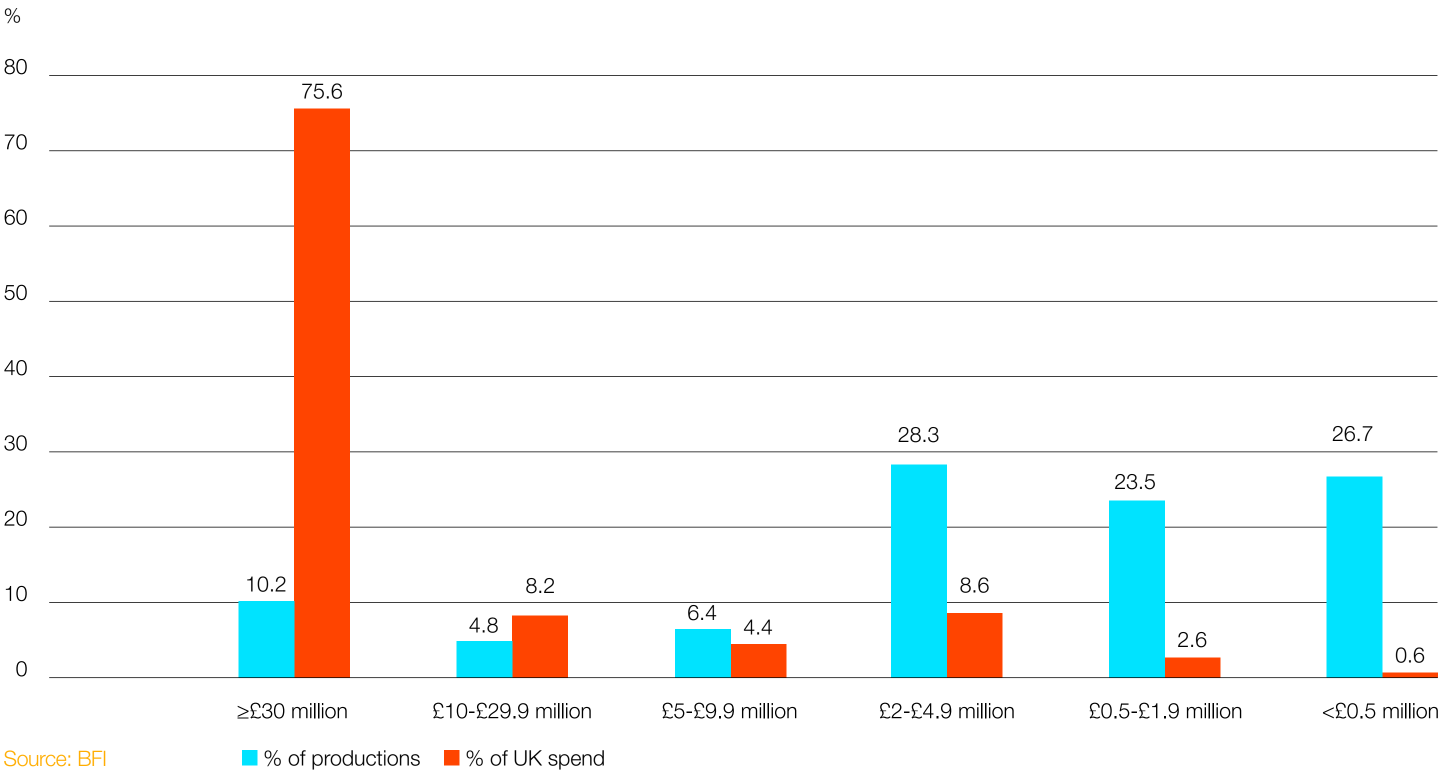
	Inward investment	Domestic UK	Co-production
2010	71.9	89.9	42.1
2011	55.9	86.7	36.0
2012	64.0	88.8	46.0
2013	68.9	85.6	45.2
2014	57.2	78.5	34.1
2015	60.0	89.4	40.2
2016	61.1	79.8	33.5
2017	52.2	86.4	38.6
2018	65.7	87.1	35.8
2019	73.1	91.4	40.5

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

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.

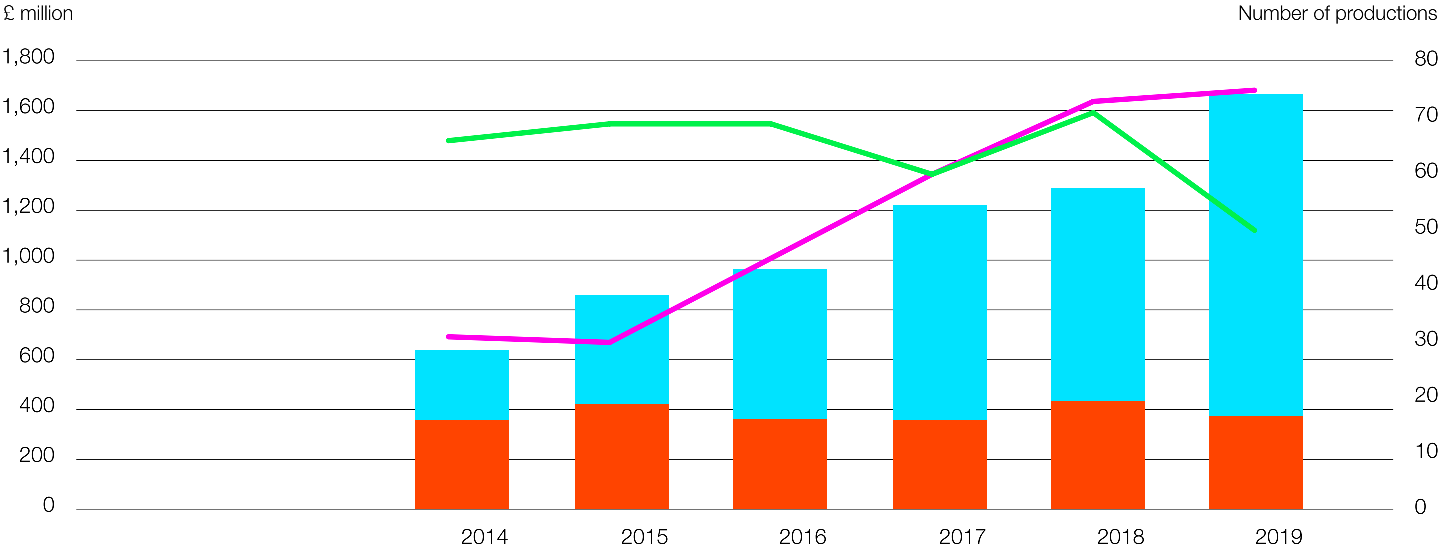
THE VALUE AND VOLUME OF HETV PRODUCTION, 2014-2019

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.

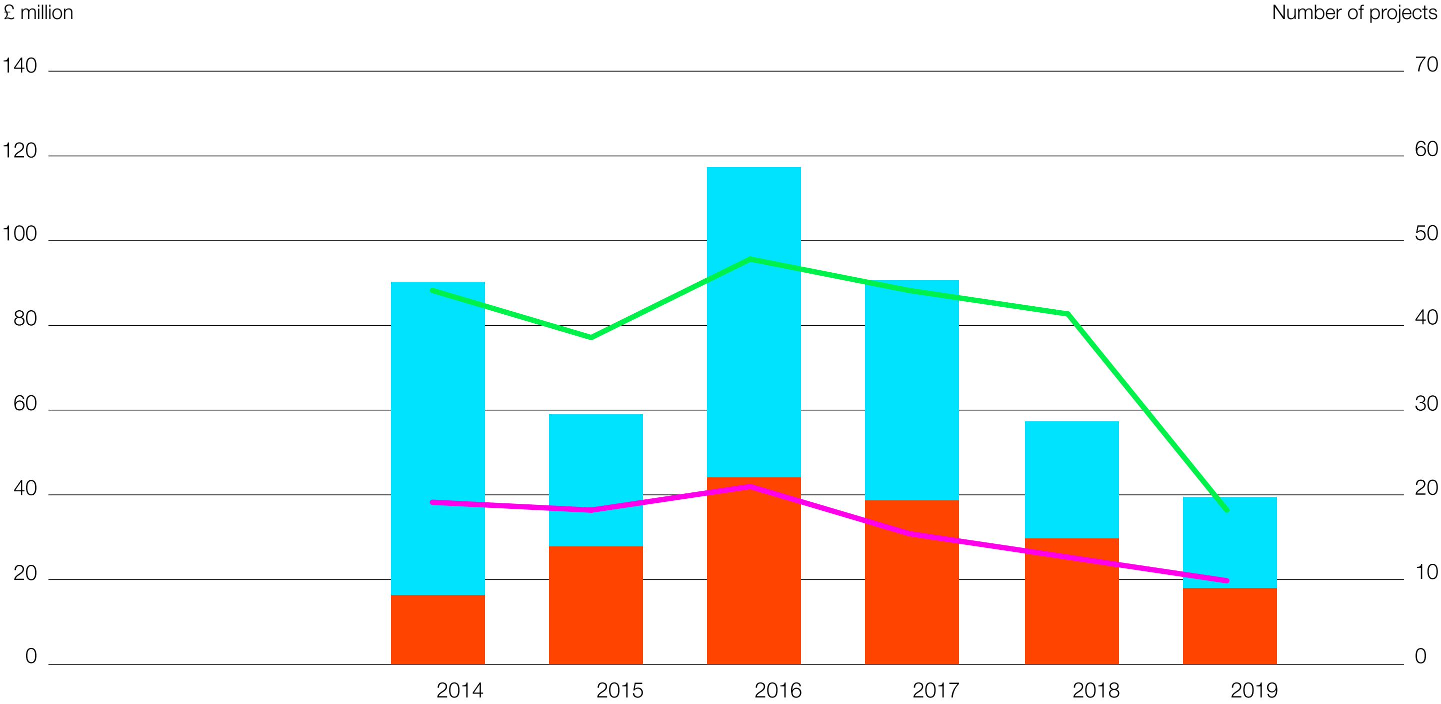
THE VALUE AND VOLUME OF ANIMATED TELEVISION PRODUCTION, 2014-2019

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.

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 2018/19 were the film tax relief, the National Lottery and government grant-in-aid.

- Total estimated public funding available for film in the UK in 2018/19 was £762 million, up 20% from £634 million in 2017/18. (This increase is largely due to a corresponding increase in UK film production tax relief (up 27% from £469 million in 2017/18 to £595 million in 2018/19).
- The principal sources of public funding were the film tax relief (78%), the National Lottery (7%) and grant-in-aid (3%) from the Department for Digital, Culture, Media and Sport (DCMS).
- The European Union contributed £4.1 million to film in the UK in calendar year 2018 (through the structural funds and the Creative Europe MEDIA sub-programme), and a further £1.5 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 83% (£680 million) of total public investment in 2018/19, followed by distribution and exhibition with 8% (£67 million).

Cover image: *The Personal History of David Copperfield* courtesy of Lionsgate Films.

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 from 2016/17 to 2018/19. (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 2018/19 is estimated to have been £762 million, up from £634 million in 2017/18. The largest single source of public funding in the year was the UK film tax relief, which provided £595 million (78% of the total). This was followed by the National Lottery (£51.5 million; 7% of the total) and grant-in-aid from the Department for Digital, Culture, Media and Sport (DCMS) to the BFI and the National Film and Television School (£25 million; 3% of the total). Funding from DCMS in 2018/19 was lower than in both 2016/17 and 2017/18, which accords with a broader decrease in UK government grant-in-aid investment.

Publicly owned national broadcasters and their film arms also made substantial investments: Film4/Channel 4 provided funding of over £23 million for UK film in 2018/19, while BBC Films/BBC provided funding of £11.5 million.

Investment from Arts Council England (ACE) in 2018/19 was over £16 million, a substantial increase from funding of £8 million in the previous financial year. 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. (Changes to the range of organisations in the ACE National Portfolio has increased the level of investment into organisations involved in artists' engagement with the moving image.)

The European Union (EU) provided investment of £4.1 million for UK film activity, of which £3.5 million came from Creative Europe's MEDIA sub-programme in 2018 (see note to Table 1) and £0.6 million was via the structural funds in 2018/19. Investment from these funds, which include the European Regional Development Fund and European Social Fund, decreased compared with 2017/18 (£1 million), and reflects a general decline in investment from EU structural funds across the UK.

Investment from the Scottish Government into film (via Creative Scotland) increased substantially from £4 million in 2017/18 to £10 million in 2018/19. This reflects the growing commitment from the Scottish Government to the screen sector, and marks the creation of Screen Scotland, a dedicated unit for film and television based within Creative Scotland.

Table 1 Public funding for film in the UK by source, 2016/17-2018/19 (ranked by 2018/19 spend)

	2016/17		2017/18		2018/19	
Agency	£ million	%	£ million	%	£ million	%
National Lottery Distribution Fund[1]	59.6	10.3	60.7	9.6	51.5	6.8
DCMS grant-in-aid	28.5	4.9	26.1	4.1	25.4	3.3
Film4/Channel 4[2]	25.7	4.4	25.4	4.0	23.3	3.1
Arts Council England[3]	13.1	2.3	8.0	1.3	16.3	2.1
Northern Ireland Executive	11.4	2.0	13.7	2.2	14.8	1.9
BBC Films/BBC[4]	10.4	1.8	11.3	1.8	11.5	1.5
Scottish Government	3.9	0.7	3.9	0.6	10.4	1.4
Creative Europe MEDIA sub-programme[5]	4.0	0.7	4.4	0.7	3.5	0.5
Higher education funding[6]	2.7	0.5	2.7	0.4	2.7	0.4
Local government[7]	2.1	0.4	2.4	0.4	2.4	0.3
Welsh Assembly Government	3.2	0.6	3.5	0.6	2.0	0.3
Department for Education	-	-	-	-	1.0	0.1
Foreign and Commonwealth Office	1.3	0.2	1.1	0.2	0.9	0.1
Other EU[8]	0.5	0.1	1.0	0.2	0.6	0.1
Department for International Trade	0.2	<0.1	0.2	<0.1	0.2	<0.1
National/regional development agencies	0.1	<0.1	0.1	<0.1	0.1	<0.1
Other public sector[9]	<0.1	<0.1	<0.1	<0.1	<0.1	<0.1
Department for Business, Energy and Industrial Strategy	<0.1	<0.1	<0.1	<0.1	-	-
Total public sector selective investment[10]	**166.7**	**28.7**	**164.7**	**26.0**	**166.6**	**21.9**
UK film production tax relief	414.9	71.3	469.0	74.0	595.0	78.1
Total public sector selective and automatic	**581.6**	**100.0**	**633.7**	**100.0**	**761.7**	**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's production investment and Channel 4 investment in the National Film and Television School (NFTS).

[3] Includes ACE National Lottery investments (e.g. from Grants for the Arts) into moving image projects, plus National Portfolio Organisation investments attributable to film and the moving image, based upon ACE calculations.

[4] Includes BBC Films' production investment and BBC investment in the NFTS and film production schemes.

[5] The figures are for calendar years 2016-2018 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: 2016 €1= £0.88; 2017 €1=£0.89; 2018 €1=£0.88.

[6] 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.

[7] Investment by local authorities in regional film archives, Creative England, and English regional screen agencies.

[8] European Social Fund, European Regional Development Fund.

[9] Very small awards (under £10,000) from a range of public sector agencies primarily made to national screen agencies.

[10] Does not include transfers to and from reserves or earned/self-generated income.

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 2018/19 (£595 million for film tax relief), followed by the BFI (£94 million), Film4/Channel 4 (£25 million), the National Film and Television School (£16 million; this figure includes capital expenditure and income from student grants) and the Scottish agencies (£16 million).

Table 2 Net film spend by agency, 2018/19[1]

	£ million	%
HM Revenue	595.0	72.4
BFI	94.2	11.5
Film4/Channel 4	25.0	3.0
National Film and Television School	16.4	2.0
Scottish agencies[2]	16.4	2.0
Arts Council England[3]	16.3	2.0
NI Screen	15.7	1.9
BBC Films/BBC	11.0	1.3
Into Film	6.2	0.8
Film London	5.3	0.6
Creative Europe MEDIA sub-programme[4]	5.0	0.6
Welsh agencies[5]	5.0	0.6
ScreenSkills	3.0	0.4
Creative England	2.4	0.3
English regional film archives[6]	1.8	0.2
Other English agencies[7]	1.7	0.2
British Council	0.9	0.1
Heritage Lottery Fund	0.1	0.0
Total public agencies[8]	**821.4**	**100.0**

Source: Named funding sources, Creative Cultural Associates analysis

Notes:

[1] 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.

[2] Includes film expenditure on the part of Creative Scotland/Screen Scotland and the National Library of Scotland Moving Image Archive.

[3] Includes ACE National Lottery investments (e.g. from Grants for the Arts) into moving image projects, plus National Portfolio Organisation investments attributable to film and the moving image, based upon ACE calculations.

[4] Investment for the calendar year 2018. Includes £1.5 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.

[5] Welsh agencies means 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] Includes East Anglian Film Archive, Media Archive for Central England (MACE), North West Film Archive, Screen Archive South East and South West Film and Television Archive. Due to staff furloughs data was not available for Yorkshire Film Archive.

[7] Includes film expenditure on the part of Northern Film + Media, Screen South and Screen Yorkshire.

[8] 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 spending by agencies (£821.4 million) is higher than total public funding for film in the 2018/19 year (£761.7 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 2016/17 and 2018/19. 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 2018/19, film production accounted for £680 million (83% of the total). In the same financial year, distribution and exhibition benefited from the second largest share of public spending at 8% (£67 million) while training and skills activity received 3% of total public spend (£28 million).

As the table shows, public spending in 2018/19 was higher in all areas compared with 2016/17 with the exception of export and inward investment promotion, film archives and heritage, and administration costs. The decrease in support for film archives and heritage may partly be attributable to the BFI re-categorising some of its investment in this area as funding for education.

Table 3 Activities supported by public spend on film, 2016/17-2018/19 (ranked by 2018/19 spend)

	2016/17		2017/18		2018/19	
	£ million	%	£ million	%	£ million	%
Production[1]	489.8	77.2	548.1	79.0	680.0	82.8
Distribution and exhibition	55.2	8.7	69.7	10.0	67.1	8.2
Training and skills[2]	24.0	3.8	26.2	3.8	28.3	3.4
Development	8.9	1.4	6.1	0.9	11.5	1.4
Education, young people and lifelong learning	9.8	1.5	8.7	1.3	10.7	1.3
Export and inward investment promotion[3]	10.9	1.7	12.5	1.8	7.0	0.8
Business support[4]	4.9	0.8	3.0	0.4	6.2	0.8
Film archives and heritage[5]	19.5	3.1	8.4	1.2	5.3	0.6
Administration and services to the public	11.6	1.8	10.7	1.5	5.3	0.6
Total[6]	**634.7**	**100.0**	**693.7**	**100.0**	**821.4**	**100.0**

Source: Creative Cultural Associates

Notes:

[1] Non-tax break production spend in 2018/19 was £85.5 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] National/regional screen agency investment: primary beneficiaries are independent production companies.

[5] BFI National Film and Television Archive, national/regional screen archives, Heritage Lottery Fund investments.

[6] 2018/19 total expenditure (£821.4 million) was greater than total public funding (£761.7 million, Table 1) as expenditure was supplemented by earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves.

Data for 2017/18 updated since publication of the 2019 Statistical Yearbook.

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

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/Screen Scotland and Northern Ireland Screen). Table 4 shows the level of investment dedicated to each of the UK nations in 2018/19. In cash terms, England received the greatest level of funding with £27 million. In per capita terms, however, the level of investment in Northern Ireland was the highest at £8.25 per person, between two and three times the level in Scotland, which had the next highest spend per person at £3.05.

Table 4 Investment in film in the UK nations 2018/19 (ranked by total dedicated investment)

	Total dedicated investment (£ million)	Population (million)	£ per capita
England[1]	27.4	55.3	0.50
Scotland[2]	16.4	5.4	3.05
Northern Ireland[3]	15.7	1.9	8.25
Wales[4]	5.0	3.1	1.60

Source: Creative Cultural Associates, ONS

[1] Includes Creative England, English regional screen agencies, English regional screen archives and Arts Council England.

[2] Includes Creative Scotland/Screen Scotland, Scottish Screen Archive.

[3] Northern Ireland Screen.

[4] Includes Ffilm Cymru Wales, Wales Film Archive and Welsh Assembly Government direct expenditure.

Image: *Lynn + Lucy* courtesy of BFI Distribution

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.

Creative Europe's MEDIA sub-programme supports European film and other audiovisual industries by funding the development, promotion and distribution of European works. In 2018, the MEDIA sub-programme invested £3.5 million in UK-based film activity; over 70% of this (£2.5 million) supported film distribution schemes (Table 5).

Table 5 Creative Europe MEDIA sub-programme investment in film in the UK, 2018

Activity area	MEDIA scheme(s)	£ million	%
Distribution	Selective, automatic, sales agents and online	2.5	71.4
Development	Single project and slate	0.6	17.1
Training and skills	Training	0.3	8.6
Exhibition	Film festivals, Europa Cinemas	0.1	2.9
Total		**3.5**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis
Notes:
Data are for calendar year 2018.
Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.88.

In addition to this, £1.5 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 British titles.

The MEDIA sub-programme also supports UK television and new media. UK video games development benefited from £300,000 in 2018, while £500,000 was invested in television production (Table 6).

Table 6 Creative Europe MEDIA sub-programme investment in television and new media in the UK, 2018

Activity area	MEDIA scheme(s)	£ million	%
Development: new media	Video games	0.3	37.5
TV Production	TV programming	0.5	62.5
Total		**0.8**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis
Notes:
Data are for calendar year 2018.
Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.88.

BFI LOTTERY AWARDS 2019

Table 7 shows the Lottery awards made by the BFI in 2019. There were 415 awards in total (up from 302 in 2018) with a combined value of £32 million.

Table 7 BFI Lottery awards, 2019 (ranked by total value)

Fund	Number of awards	Total value (£ million)
Film Fund - Production	33	12.6
Film Fund - Audiences	84	10.1
Film Fund - Talent development	147	3.1
Film Fund - Development	110	2.2
Film Fund - Heritage	1	2.1
Film Fund - International	40	1.7
Total	**415**	**31.8**

Source: BFI

Note: BFI awards data are for calendar year 2019.

A total of 12 films were awarded project funding of £250,000 or over from the BFI in 2019 (Table 8). Two films received funding of over £1 million. (The value of awards listed in the table includes all funding for individual projects in 2019, and may comprise separate awards for development, pre-production, production and distribution).

Table 8 Large awards (£250,000+) for film made by the BFI, 2019, ranked by total value of awards

Project	Total value of awards (£)
Ammonite	1,360,000
Ali & Ava	1,010,000
The Souvenir: Part II	955,000
A Gaza Weekend	930,300
Martyrs Lane	843,000
Surge	840,000
The Power	840,000
Pretty Red Dress	779,500
Supernova	770,000
Censor	727,000
After Love	645,000
Herself	570,862

Source: BFI

Note: BFI awards data are for calendar year 2019.

LEADING PUBLIC INVESTORS IN BRITISH FILM PRODUCTION, 2017-2019

Table 9 shows the leading providers of public agency and public service broadcaster investment in British films for the calendar years 2017-2019. The public investor involved with the greatest number of films over the period was the BFI with 70 projects (combined budget £202 million) whilst projects backed by Film4/Channel 4 had the highest combined budget (£226 million). 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, 2017-2019, ranked by number of films

Public funder	Number	Estimated budget (£ million)	Selected titles
BFI	70	202	Ammonite; Lynn + Lucy; The Souvenir: Part II
BBC Films/BBC	65	161	Blue Story; Horrible Histories: The Movie - Rotten Romans; Mogul Mowgli
European agencies/Creative Europe*	41	123	Love Wedding Repeat; Pinocchio; The White Crow
Film4/Channel 4	34	226	Everybody's Talking About Jamie; Last Night in Soho; The Personal History of David Copperfield
Creative Scotland/Screen Scotland	31	57	The Last Bus; Tell It to the Bees; Wise Blood
Welsh agencies/S4C/Welsh Assembly Government	23	60	Dream Horse; Men Who Sing; Ray & Liz
English regional screen agencies	15	25	Hope Gap; Official Secrets; Sweetheart
Screen Ireland/Broadcasting Authority of Ireland**	15	38	Boys from County Hell; Herself; Vita & Virginia
Creative England	13	13	After Love; Days of the Bagnold Summer; Surge
Northern Ireland Screen	11	32	Here Before; Nowhere Special; Wildfire

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

FACTS IN FOCUS

Over 63,000 students were entered for secondary school and further education level screen and media related qualifications in 2019/20, while in 2018/19 almost 24,000 students were entered for higher education screen and media related courses. In 2019, 84,000 people were employed in the film industry, the third highest figure since 2010.

- In 2019/20, over 260,000 children and young people across the UK participated in the film club initiative supported by Into Film, and almost 850 talented 16-19 year olds gained filmmaking experience through the BFI Film Academy programme.
- In 2019/20, 38,400 students were entered for GCSE Media/Film/TV Studies and Moving Image Arts, down 4.5% from 40,200 in 2018/19.
- In 2019/20, 1,800 students were entered for Scottish National Level 4/5 Media Studies, down 2% from 1,900 in 2018/19.
- In 2019/20, 21,900 students were entered for GCE A Level Media/Film/TV Studies and Moving Image Arts, down 1% from 22,250 in 2018/19.
- In 2019/20, 900 students were entered for Scottish Higher Media Studies, down 9% from 1,000 in 2018/19.
- In 2018/19 (the last year for which data are available) 23,800 students were entered for higher education courses in Media/Film Studies and Film Production, up 1% from 23,600 in 2017/18.
- In 2019, around 84,000 people worked in the UK film industry, of whom 66,000 worked in film and video production.
- In 2019, over half (54%) of people working in film and video production were self-employed compared with 18% of the total UK workforce.
- Women made up 23.5% of screenwriters of UK films released in the UK and Republic or Ireland in 2019 and 16% of directors.
- In 2019, 70% 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.

Cover image: *Official Secrets* courtesy of Entertainment One UK

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 the BFI and a range of other funders, Into Film's core role is to make film an integrated part of education for 5-19 year olds. 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.)

According to Into Film, in 2019/20 there were over 16,100 registered film clubs in the UK, an increase of 24% compared with 2018/19. Over 260,000 children and young people participated in some form of film club activity and over 5,100 teaching professionals and youth leaders received training to work with film across the curriculum (including Film Studies). It is estimated that around 105,000 sets of educational resources were downloaded during the year. Resources ranged from curriculum-linked worksheets, lesson plans and presentations to film discussion guides, supported by a catalogue of selected films primarily available for use within film clubs.

Table 1 National/regional distribution of registered film clubs, 2018/19 and 2019/20 (ranked by number of clubs registered in 2019/20)

	2018/19		2019/20	
Nation/region	**Number of film clubs**	**% of film clubs**	**Number of film clubs**	**% of film clubs**
England	10,028	77.0	12,611	78.2
London	1,786	13.7	2,276	14.1
South East	1,529	11.7	1,889	11.7
North West	1,148	8.8	1,775	11.0
South West	1,155	8.9	1,389	8.6
West Midlands	1,121	8.6	1,325	8.2
East of England	991	7.6	1,219	7.6
Yorkshire and The Humber	898	6.9	1,098	6.8
East Midlands	906	7.0	1,058	6.6
North East	494	3.8	582	3.6
Scotland	1,246	9.6	1,479	9.2
Wales	862	6.6	1,046	6.5
Northern Ireland	894	6.9	989	6.1
Total	**13,030**	**100.0**	**16,125**	**100.0**

Source: Into Film

Notes:

The data presented here include active film clubs only.

Percentages may not sum to 100 due to rounding.

One of Into Film's flagship events is the annual Into Film Festival, a UK-wide programme of free film screenings and related activities for children and young people. The festival aims to build on the success of National Schools Film Week previously run by the charity Film Education which closed in April 2013. As Table 2 shows, just under 425,000 children and young people (in addition to almost 79,000 education professionals) attended the festival in 2019, a rise of 14% compared with 2018.

Table 2 Attendances at the Into Film Festival, 2015-2019

	2015	2016	2017	2018	2019
Into Film Festival	353,416	407,058	411,466	371,164	424,818

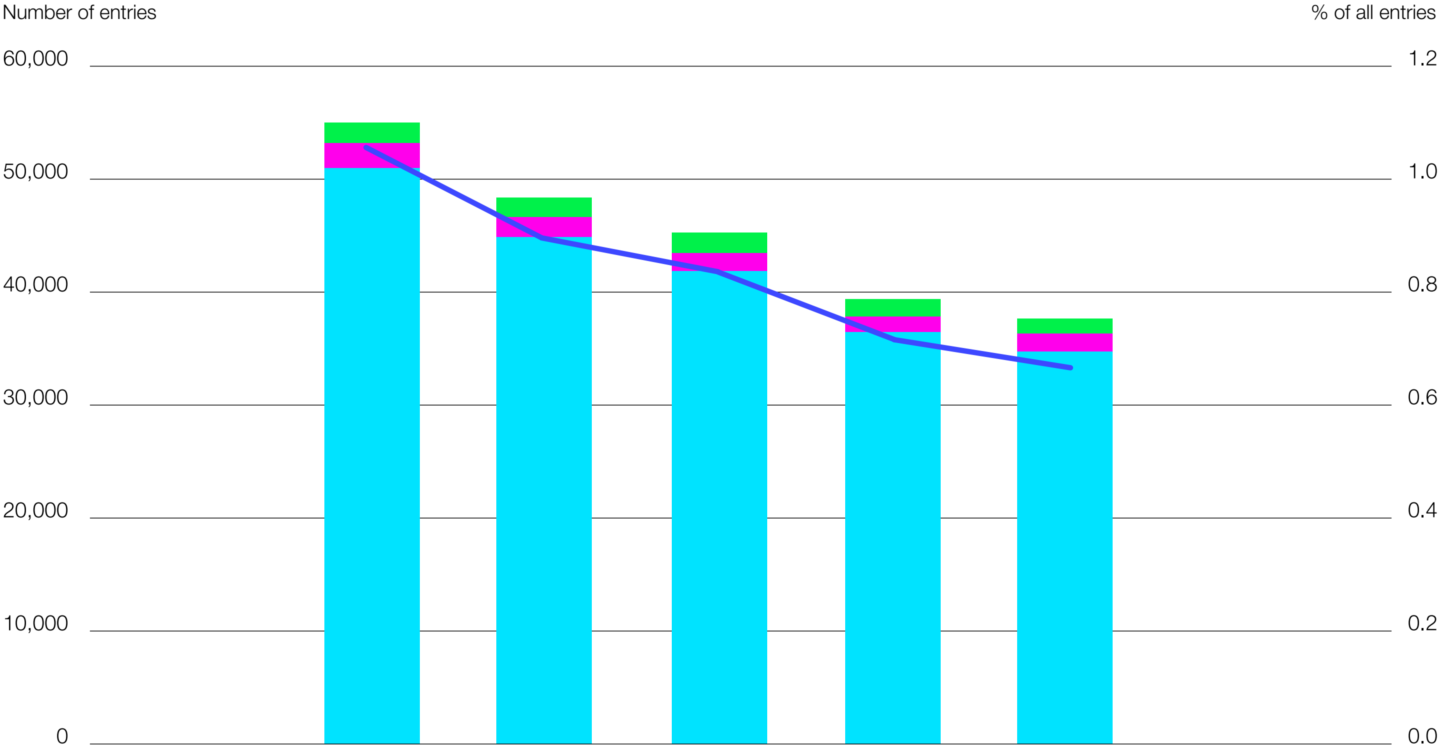
Source: Into Film

Note: Figures are for attendances by children and young people only; they do not include education professionals or other adult attendees.

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 2015/16 and 2019/20.

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 32% decrease in the total number of students entering GCSE Media, Film or TV Studies in England, Wales and Northern Ireland since 2015/16, compared with a 9% increase in overall GCSE entries. Total Media, Film or TV Studies entries in 2019/20 were just under 37,700, which equates to less than 0.7% 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, 2015/16-2019/20



	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 2019/20
Northern Ireland	1,771	1,717	1,789	1,529	1,366	-10.7	-22.9
Wales	2,248	1,780	1,663	1,416	1,594	12.6	-29.1
England	50,957	44,865	41,832	36,437	34,711	-4.7	-31.9
Total	**54,976**	**48,362**	**45,284**	**39,382**	**37,671**	**-4.3**	**-31.5**
All GCSE entries	5,240,796	5,443,072	5,470,076	5,547,447	5,692,464	2.6	8.6
Media/Film/TV Studies as % of all entries	1.05	0.89	0.83	0.71	0.66	-	-

Source: Joint Council for Qualifications (JCQ)

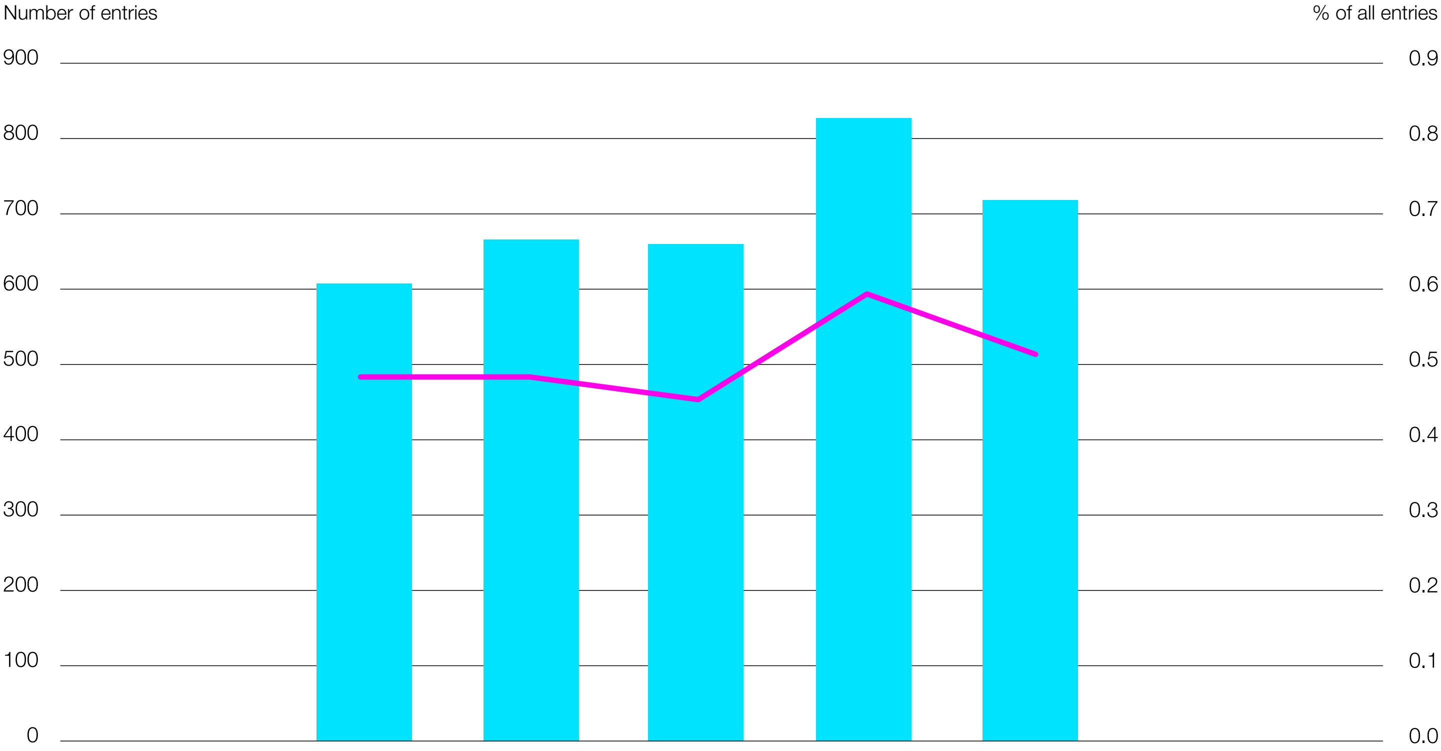
Notes:

GCSE entries as % of total entries are shown to two decimal places to better chart the decline in share over the period.

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. While entries for the qualification fell from 827 in 2018/19 to 718 in 2019/20, this figure is still the second highest of the period.

Figure 2 Entries for GCSE Moving Image Arts in Northern Ireland, 2015/16-2019/20



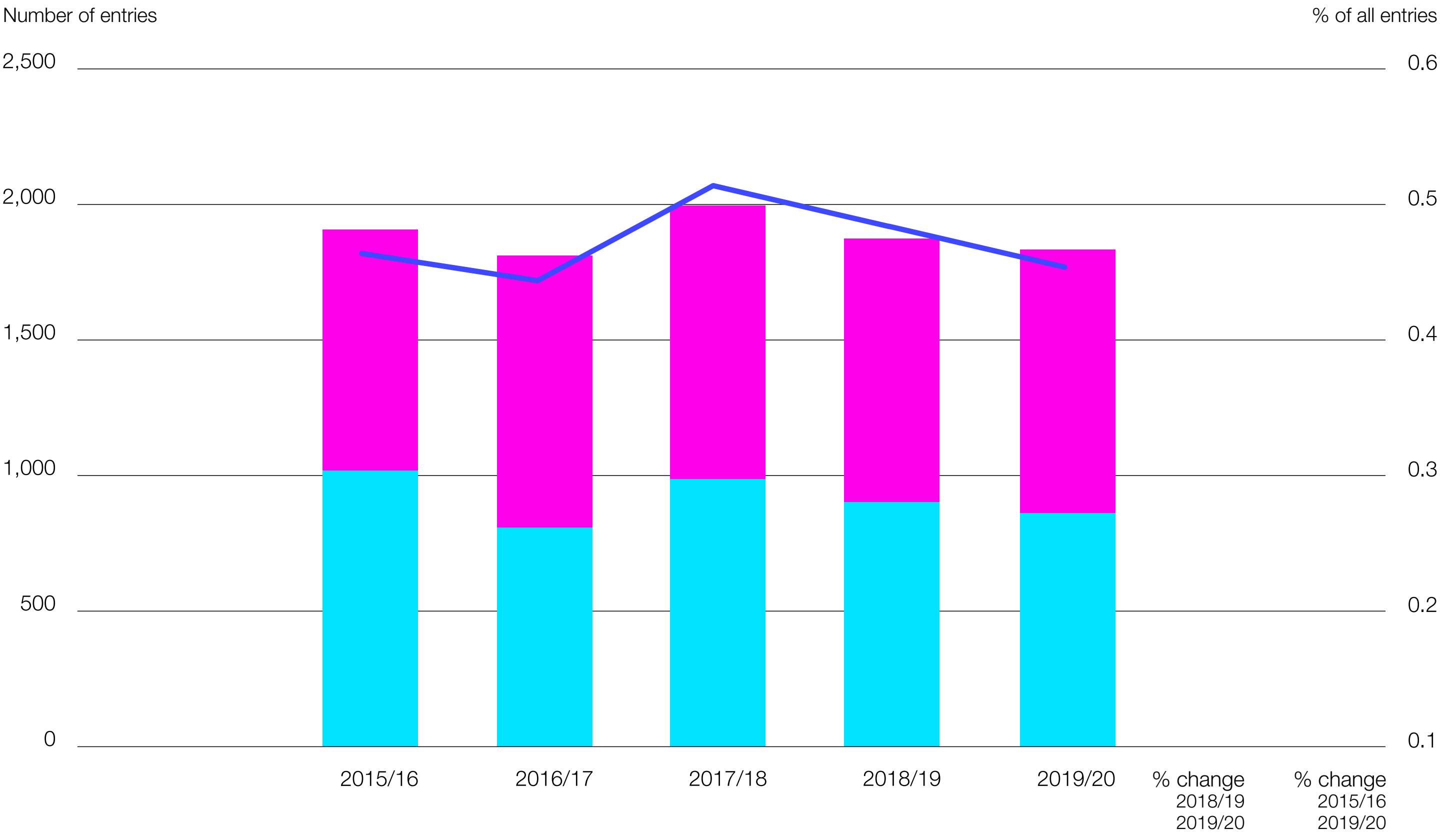
	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 2019/20
GCSE Moving Image Arts entries	607	666	660	827	718	-13.2	18.3
All GCSE entries in Northern Ireland	126,964	137,486	146,451	140,734	141,039	0.2	11.1
Moving Image Arts as % of all entries	0.48	0.48	0.45	0.59	0.51	-	-

Source: Council for the Curriculum, Examinations and Assessment (CCEA)

Note: Data for 2015/16 include entries for a limited scheme in Scotland but percentages apply to Northern Ireland only.

In total, there were 1,833 entries for Scottish National Levels 4 and 5 Media Studies in 2019/20, down 2% compared with 2018/19, and a decrease of 8% compared with the five-year high (1,994) reported for 2017/18 (Figure 3). 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 Entries for Scottish National Level 4/5 Media Studies, 2015/16-2019/20

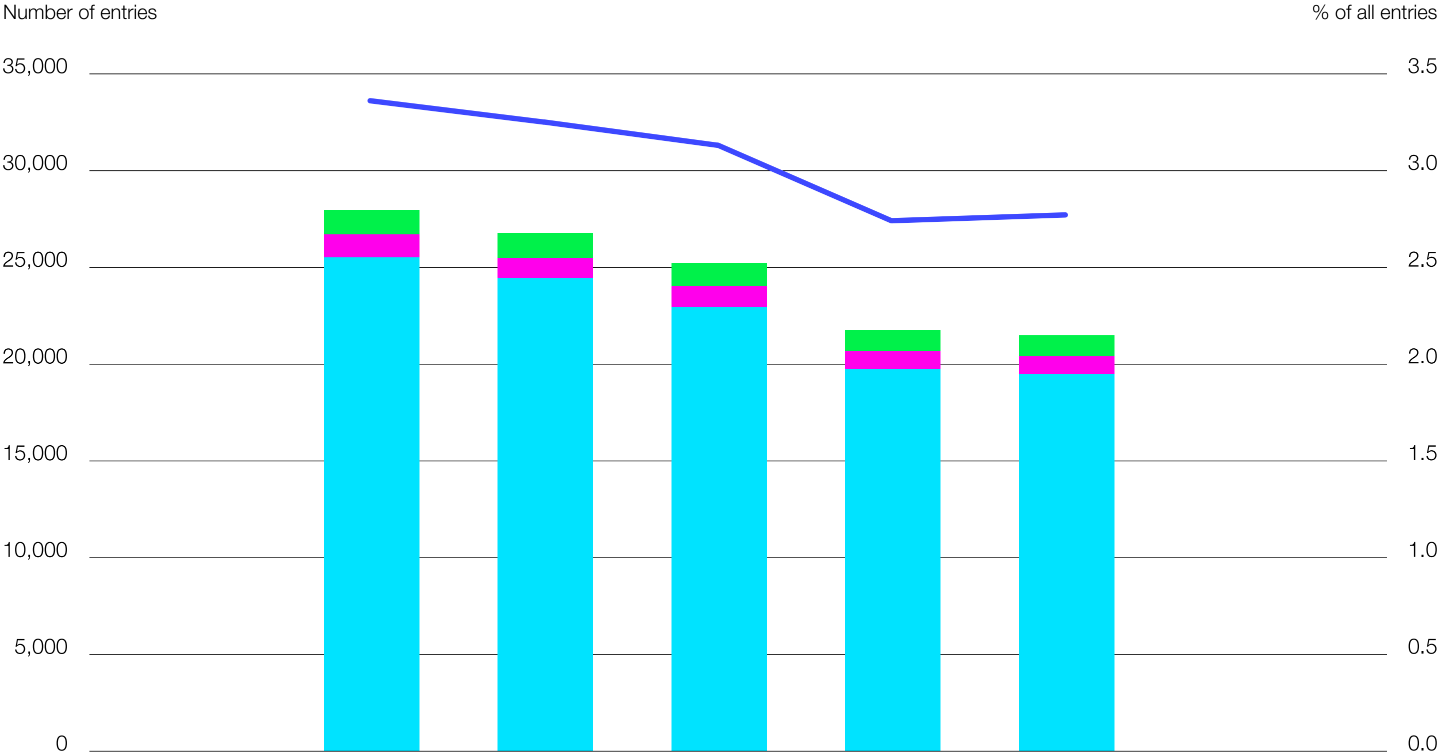


	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 2019/20
National Level 5 Media Studies entries	889	1,003	1,007	972	971	-0.1	9.2
National Level 4 Media Studies entries	1,018	808	987	902	862	-4.4	-15.3
Total	**1,907**	**1,811**	**1,994**	**1,874**	**1,833**	**-2.2**	**-3.9**
National Level 5 entries	295,083	293,220	281,785	288,552	300,639	4.2	1.9
National Level 4 entries	122,961	116,032	106,033	104,866	103,596	-1.2	-15.7
Total all entries	**418,044**	**409,252**	**387,818**	**393,418**	**404,235**	**2.7**	**-3.3**
Media Studies as % of all entries	0.46	0.44	0.51	0.48	0.45	-	-

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 2015/16 (28,000 entries) and 2019/20 (21,500 entries), compared with a fall of 7% in all equivalent entries (Figure 4). As a percentage of entries for all GCE A Levels, entries for Media, Film or TV Studies in 2019/20 were up very slightly compared with 2018/19, but lower than any other year in the period.

Figure 4 Entries for GCE A Level Media/Film/TV Studies in England, Wales and Northern Ireland, 2015/16-2019/20



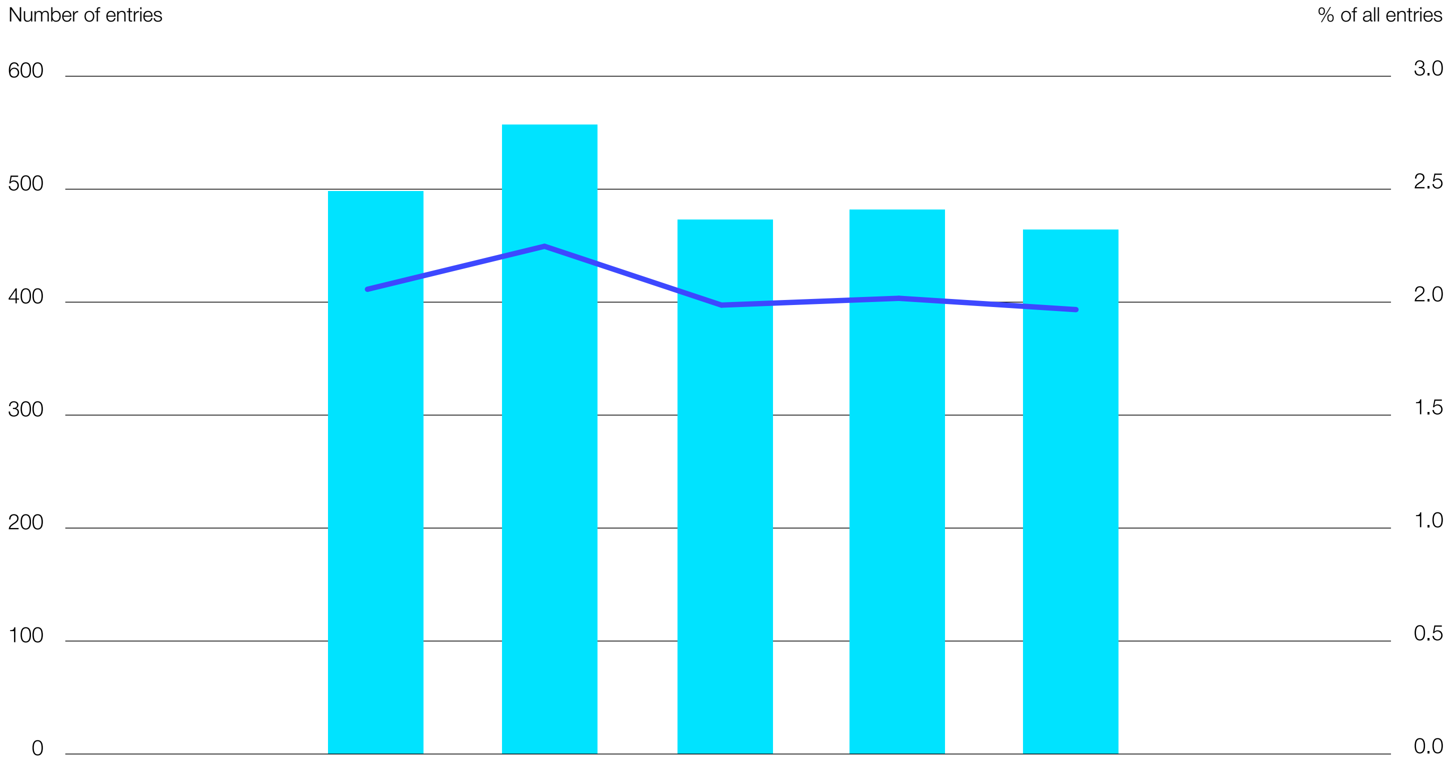
	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 2019/20
Northern Ireland	1,250	1,275	1,207	1,091	1,067	-2.2	-14.6
Wales	1,197	1,048	1,065	919	894	-2.7	-25.3
England	25,516	24,450	22,968	19,765	19,517	-1.3	-23.5
Total	**27,963**	**26,773**	**25,240**	**21,775**	**21,478**	**-1.4**	**-23.2**
All GCE A Level entries	836,705	828,355	811,776	801,002	781,029	-2.5	-6.7
Media/Film/TV Studies as % of all entries	3.34	3.23	3.11	2.72	2.75	-	-

Source: Joint Council for Qualifications (JCQ)

Note: Scotland is not included because of its separate examinations system.

As Figure 5 shows, while entries for the GCE A Level in Moving Image Arts in Northern Ireland as a percentage of all A Level entries in Northern Ireland remained fairly constant between 2015/16 and 2019/20, there was an overall decline in the volume of entries, with numbers down 7% over the period.

Figure 5 Entries for GCE A Level Moving Image Arts in Northern Ireland, 2015/16-2019/20

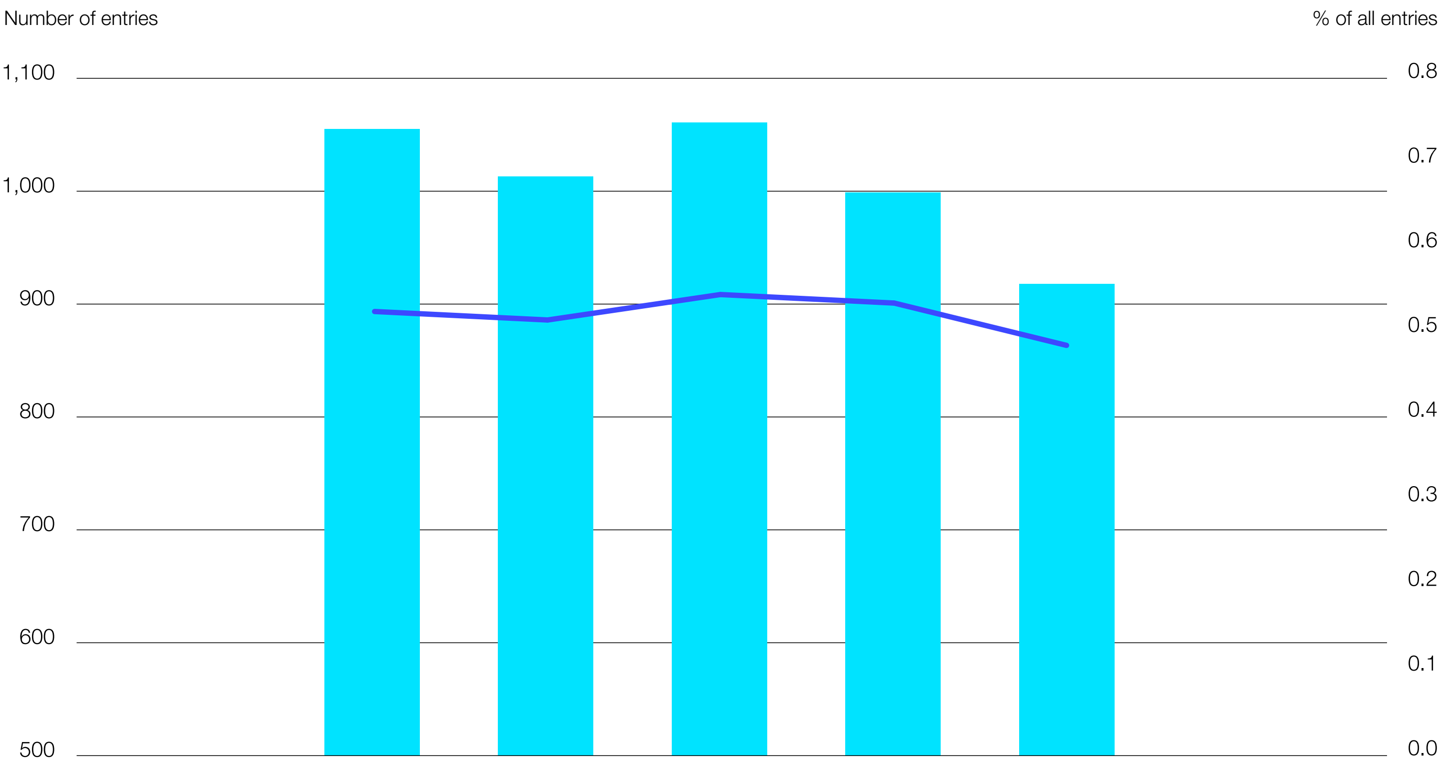


	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 2019/20
GCE A Level Moving Image Arts entries	498	557	473	482	464	-3.7	-6.8
All GCE A Level entries in Northern Ireland	24,165	24,726	23,737	23,867	23,583	-1.2	-2.4
Moving Image Arts as % of all entries	2.06	2.25	1.99	2.02	1.97	-	-

Source: Council for the Curriculum, Examinations and Assessment (CCEA)

The number of entries for Scottish Higher Level Media Studies has seen a slight downward trend overall since 2015/16 (Figure 6). However, as a percentage of all equivalent entries, Media Studies entries have remained fairly constant at around 0.5%.

Figure 6 Entries for Scottish Higher Media Studies, 2015/16-2019/20

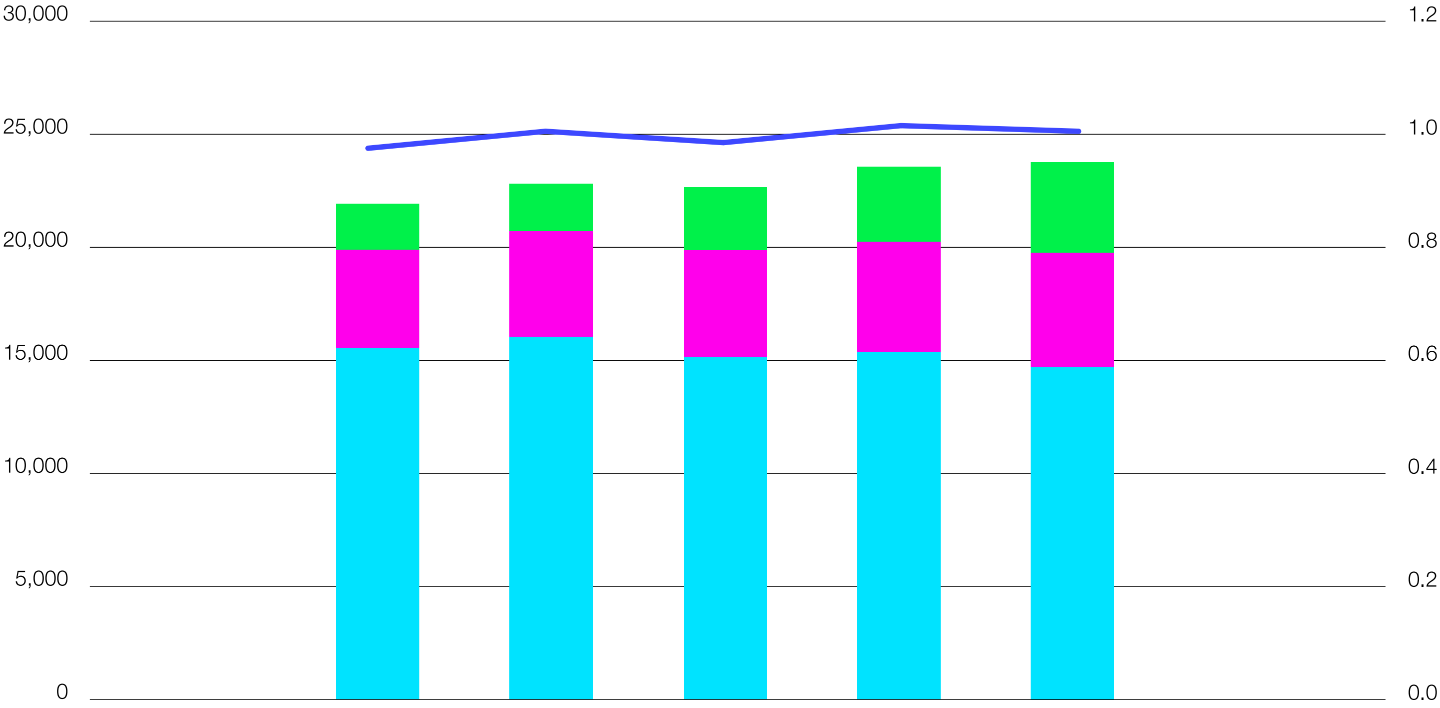


	2015/16	2016/17	2017/18	2018/19	2019/20	% change 2018/19 2019/20	% change 2015/16 2019/20
Higher Level Media Studies entries	1,055	1,013	1,061	999	918	-8.8	-14.9
All Higher Level entries	197,774	194,813	191,951	185,914	186,214	0.2	-6.2
Media Studies entries as % of total entries	0.53	0.52	0.55	0.54	0.49	-	-

Source: Scottish Qualifications Authority (SQA)

Study of the moving image and allied creative industries at a higher education level shows a different trajectory than the majority of the previous qualifications. As Figure 7 shows, there was an overall upward curve in the number of entries between 2014/15 and 2018/19 (the latest year for which data are available). Just under 23,800 students were enrolled on such courses in 2018/19, the highest figure of the five-year period. While these courses have collectively counted for around 1% of overall enrolment in higher education, Media Studies entries decreased by 6% over the period, entries for Film Studies increased by 15% and entries for Film Production increased by 49%.

Figure 7 Higher education entries in film and media, 2014/15-2018/19



	2014/15	2015/16	2016/17	2017/18	2018/19	% change 2017/18 2018/19	% change 2014/15 2018/19
Film Production	2,035	2,090	2,810	3,335	3,995	16.5	49.1
Film Studies	4,335	4,680	4,725	4,890	5,080	3.7	14.7
Media Studies	15,550	16,035	15,130	15,340	14,705	-4.3	-5.7
Total	**21,920**	**22,800**	**22,665**	**23,565**	**23,780**	**0.9**	**7.8**
All higher education entries	2,266,075	2,280,830	2,317,880	2,343,095	2,383,970	1.7	4.9
% of all entries	0.97	1.00	0.98	1.01	1.00	-	-

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 is only currently available up to 2018/19.

Many of the film and media related further and higher education courses are accredited by ScreenSkills (formerly Creative Skillset), the UK-wide strategic skills body for the screen-based creative industries. In 2019, ScreenSkills replaced its previous 'Tick' quality mark with the ScreenSkills Select endorsement which aims to signpost prospective students to the courses that will provide industry-relevant skills and strong links with industry professionals and potential employers.

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. In 2019/20 the Academy worked with 40 delivery partners reaching 847 young people from across the UK (Table 3). Of these students, 130 attended residential courses over the year.

Following a successful pilot in 2017, 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. In 2019, in partnership with Walt Disney and EON Productions, the scheme enabled 33 young people, the majority of whom were Academy graduates, to work as paid trainees in a variety of craft and technical roles on the production of *Black Widow*, *Cruella* or *No Time to Die*.

Across all Academy programme activity in 2019/20, 53% of the participants were female, 25% were from black and minority ethnic backgrounds, 19% received free school meals, and 16% were disabled.

Table 3 BFI Film Academy participants, 2015/16-2019/20 (ranked by 2019/20 enrolment)

Nation/region	2015/16	2016/17	2017/18	2018/19	2019/20
England	679	715	700	694	657
London	146	150	146	162	135
South West	97	110	101	98	98
South East	88	109	81	80	89
Yorkshire and The Humber	78	82	73	75	78
East of England	71	71	83	75	71
North West	52	54	69	56	56
West Midlands	60	55	60	60	53
North East	47	44	46	48	40
East Midlands	40	40	41	40	37
Northern Ireland	80	80	84	82	74
Scotland	74	86	79	60	72
Wales	32	46	30	56	44
Total	**865**	**927**	**893**	**892**	**847**

Source BFI

OTHER FILM 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 2019/20 included: the Cinemagic Film and Television Festival's 'Home' Project, which provided an opportunity for 24 young people from Northern Ireland aged 16-18 to develop filmmaking skills on the production of two short films; a second round of CISP Multimedia's Welsh-language project Ein Stori Ni! which gives primary school children across south Wales hand-on experience of storyboarding, filming and editing their own films; a third round of the Independent Cinema Office's UK-wide leadership programme aimed at women already working as senior managers in the exhibition sector; and the 2020 outing of Bectu Vision's Producer Development Programme which aimed to develop the skills and connections of Scottish-based film producers to enable them to broaden their careers to include television drama production.

The BFI continues to run programmes for learners of all ages at BFI Southbank and as part of its festival outreach. Film education for children and young people is provided through events, study days and INSETs for primary and secondary school pupils and further education students, while families can learn about film together through creative workshops and activity days. For adult learners (including higher education students), the BFI runs an annual series of one-off and sustained learning experiences including library talks, courses, introduced screenings and discussion events.

In 2019/20, there were 43,400 admissions to education events run by BFI Southbank and BFI festivals, down from 47,000 in 2018/19 (Table 4). There was an increase, however, in the number of visits to the BFI Reuben Library, which rose from 72,500 in 2018/19 to 73,500 in 2019/20. (Visits to the Library increased substantially between 2011/12 and 2012/13 following its relocation from the BFI head office to BFI Southbank.)

Table 4 BFI education attendances, 2010/11-2019/20

	BFI Southbank and festivals education event admissions	BFI Reuben Library visits
2010/11	43,532	10,983
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
% change 2018/19-2019/20	-7.7	1.4
% change 2010/11-2019/20	-0.4	569.2

Source: BFI

EMPLOYMENT IN THE FILM INDUSTRY

The film industry employs substantial numbers of highly skilled workers. Employment levels, however, are 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 2019 an estimated 84,000 people worked in film and video production, film and video distribution and film exhibition (Table 5). The figures include full- and part-time workers.

Table 5 Film industry workforce, 2019

Sector	Number in employment
Film and video production	66,000
Film and video distribution	3,000
Film exhibition	15,000
Total	**84,000**

Source: Office for National Statistics, Annual Population Survey

Notes:

Numbers in employment are taken from the Annual Population Survey for the period January-December 2019.

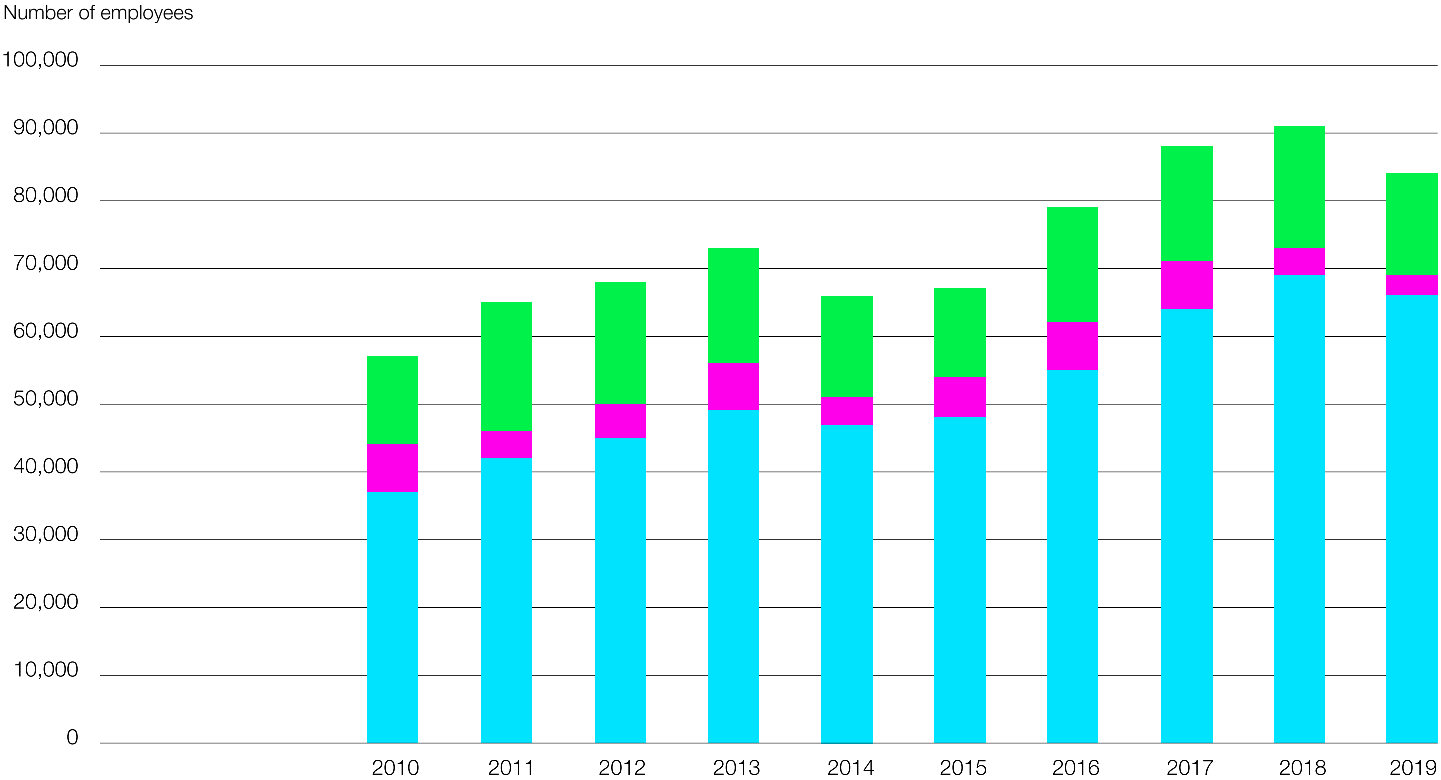
Figures are shown to the nearest 1,000.

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, growth in the size of the film workforce between 2010 and 2019 was driven primarily by increases in the number of employees in film and video production. Despite contractions in 2014 and 2019, the production sector workforce increased by 78% over the decade, rising from 37,000 in 2010 to 66,000 in 2019. Employment levels in the industry's other main sectors have fluctuated over the period but within relatively narrow ranges: the number of workers in film and video distribution has ranged from 3,000-7,000, while the number of workers in film exhibition has ranged from 13,000-19,000.

Figure 8 Size of the film workforce, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Film exhibition	13,000	19,000	18,000	17,000	15,000	13,000	17,000	17,000	18,000	15,000
Film and video distribution	7,000	4,000	5,000	7,000	4,000	6,000	7,000	7,000	4,000	3,000
Film and video production	37,000	42,000	45,000	49,000	47,000	48,000	55,000	64,000	69,000	66,000
Total	**57,000**	**65,000**	**68,000**	**73,000**	**66,000**	**67,000**	**79,000**	**88,000**	**91,000**	**84,000**

Source: Office for National Statistics, Annual Population Survey

See notes to Table 5.

The production sector has traditionally employed a high proportion of freelance workers. In 2019, 54% of those engaged in film and video production, a total of more than 36,000 people, were self-employed (Table 6). In comparison, only 18% of the total UK workforce was self-employed in 2019.

Table 6 Film and video production workforce, 2010-2019

Year	Total in employment	Self-employed	Self-employed as % of total
2010	37,000	20,000	54
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

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 5.

THE GENDER OF WRITERS AND DIRECTORS OF UK FILMS

In 2019, of the 264 identified writers of UK films released during the year 62 (23.5%) were women (Table 7). This was the third consecutive year to see the proportion of female writers of UK films surpass 20%. (These are the only years to exceed this threshold since we began to track the under-representation of women among screenwriters and directors of UK films in 2005.)

Female writers associated with UK films released in the year include Henrietta Ashworth and Jessica Ashworth (*Tell It to the Bees*), Katrin Benedikt (*Angel Has Fallen*), Sara Bernstein (*Official Secrets*), Deborah Davis (*The Favourite*), Meg Leonard (*Fisherman's Friends*), Sacha Polak and Susanne Farrell (*Dirty God*), Nicole Taylor (*Wild Rose*), Emma Thompson and Bryony Kimmings (*Last Christmas*) and Anna Waterhouse (*The Aftermath*).

Table 7 Gender of writers of UK films released in the UK, 2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of UK films released in the UK	119	127	162	139	154	209	176	159	197	191
Number of writers associated with these films	143	159	187	155	211	285	233	209	276	264
Number of male writers	126	129	162	133	181	244	195	165	211	202
Number of female writers	17	30	25	22	30	41	38	44	65	62
% male	88.1	81.1	86.6	85.8	85.8	85.6	83.7	78.9	76.4	76.5
% female	11.9	18.9	13.4	14.2	14.2	14.4	16.3	21.1	23.6	23.5

Source: BFI

At 16%, the proportion of female directors associated with UK films released in 2019 was the highest of the 10-year period 2010-2019 (Table 8). Of the 208 identified directors of UK film releases, 34 were women (the highest number for any year since 2005).

Female directors associated with UK films released in the year include Lisa Barros D'Sa (*Ordinary Love*), Annabel Jankel (*Tell It to the Bees*) and Josie Rourke (*Mary Queen of Scots*). Directors who also wrote or co-wrote the scripts for their films include Amma Asante (*Where Hands Touch*), Gurinder Chadha (*Blinded by the Light*), Joanna Hogg (*The Souvenir*), Georgia Parris (*Mari*), Sacha Polak (*Dirty God*) and Sadia Saeed (*Arifa*).

Table 8 Gender of directors of UK films released in the UK, 2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of UK films released in the UK	119	127	162	139	154	209	176	159	197	191
Number of directors associated with these films	133	140	179	149	165	224	188	178	212	208
Number of male directors	116	119	165	128	148	203	163	150	183	174
Number of female directors	17	21	14	21	17	21	25	28	29	34
% male	87.2	85.0	92.2	85.9	89.7	90.6	86.7	84.3	86.3	83.7
% female	12.8	15.0	7.8	14.1	10.3	9.4	13.3	15.7	13.7	16.3

Source: BFI

THE WORKPLACE LOCATION

In 2019, 70% 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 9).

Table 9 London and South East employment as percentage of total, 2019

Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	27,300,000	9,500,000	29.7
Film and video production	66,000	46,000	69.9

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 2019.

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.

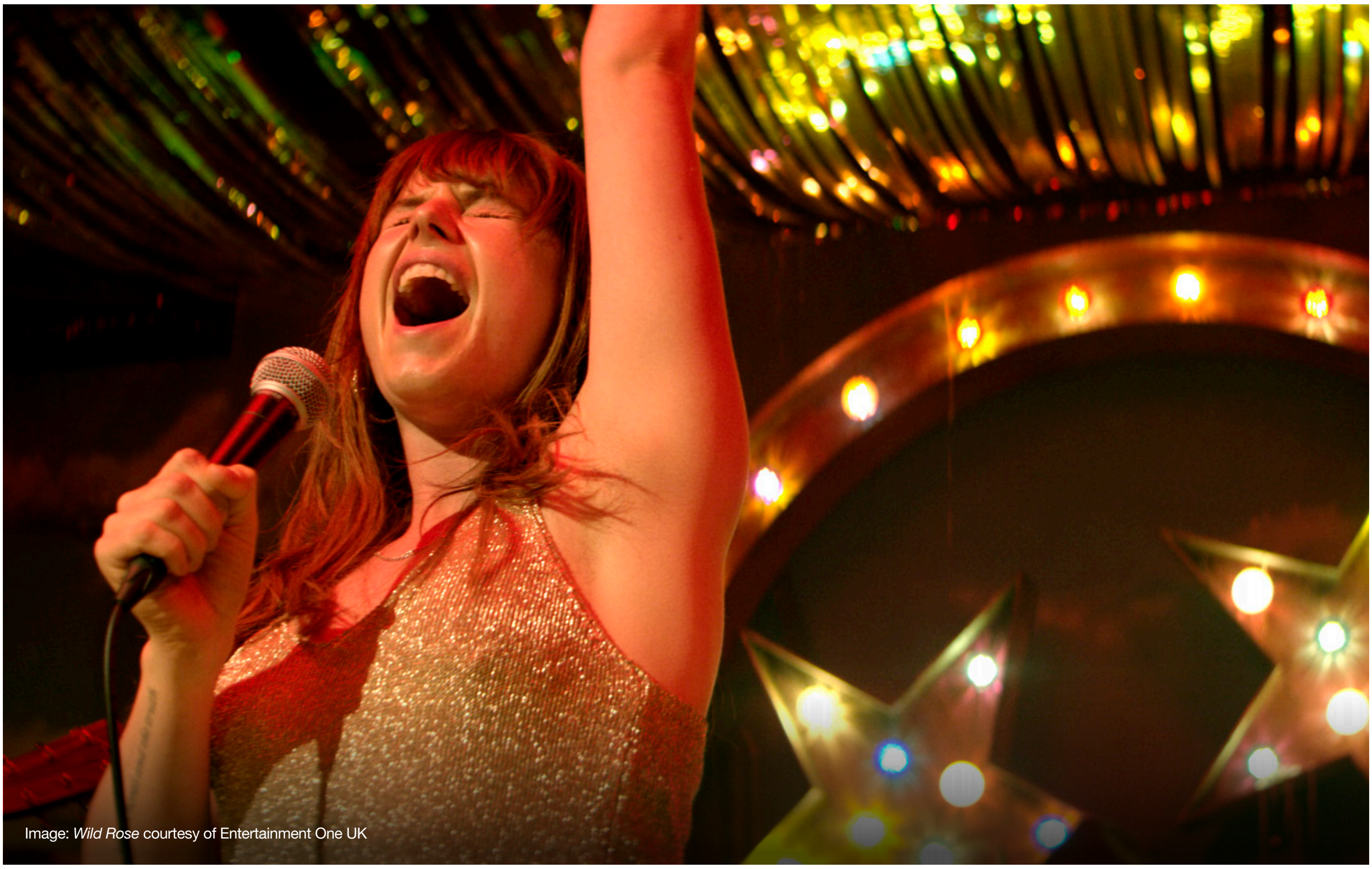
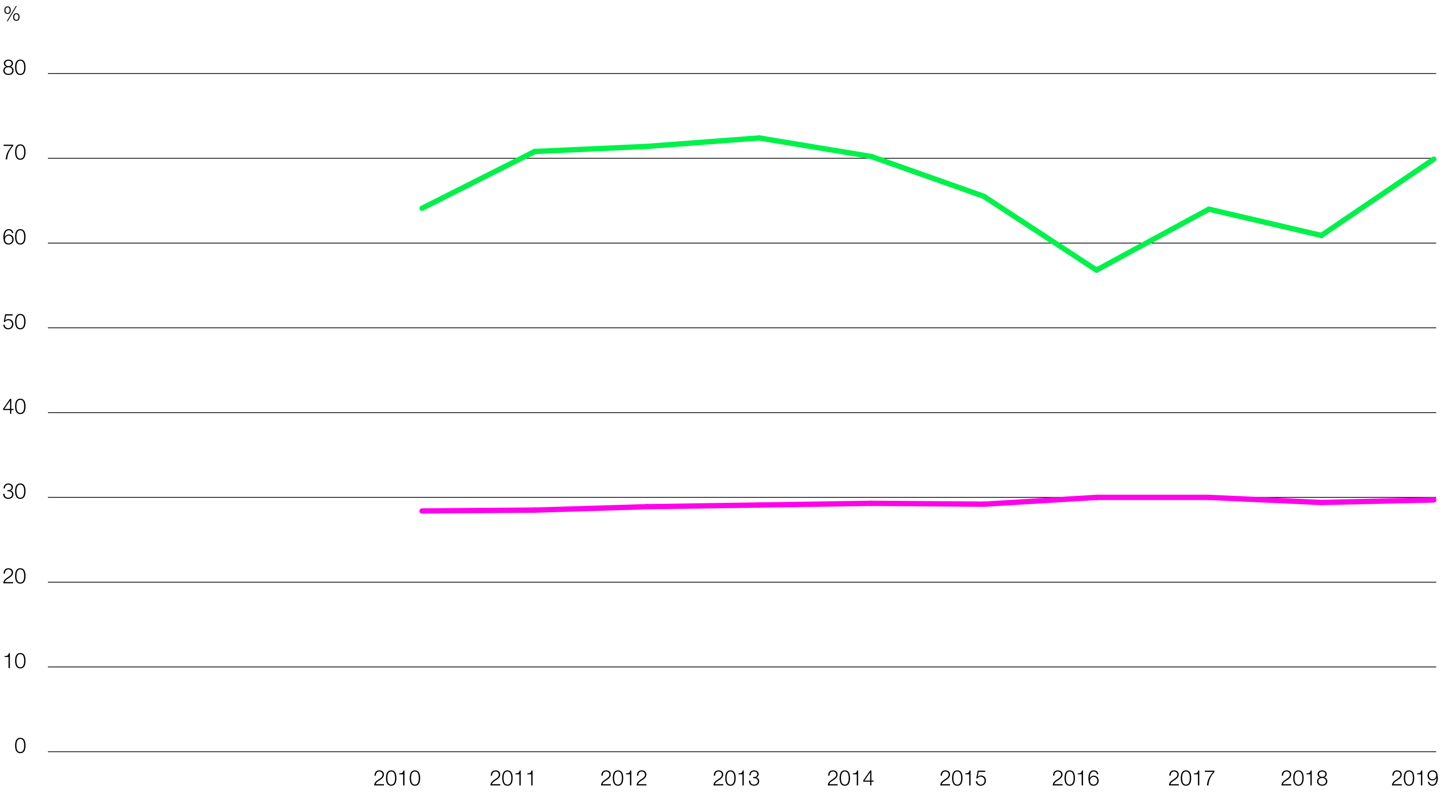


Image: *Wild Rose* courtesy of Entertainment One UK

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 28%-30%.

Figure 9 London and South East percentage share of the film and video production and total workforce, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Film and video production	64.1	70.8	71.4	72.4	70.2	65.5	56.8	64.0	60.9	69.9
UK all industries	28.4	28.5	28.9	29.1	29.3	29.2	30.0	30.0	29.4	29.7

Source: Office for National Statistics, Annual Population Survey
See notes to Table 9.

THE SCALE OF THE WORKPLACE

Tables 10 to 12 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 10 to 12 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 2019 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 2019, the film and video production sector had a very large number of workplaces with low numbers of employees (Table 10). Workplaces with 10 employees or fewer accounted for 97% of all workplaces in the sector and over half of its total workforce (54%). At the other end of the scale, there were a small number of workplaces with high numbers of employees. The 85 workplaces with 50 or more workers accounted for just over 11,500 employees, an average of 136 each.

Table 10 Numbers of employees in film and video production by size of workplace for the UK, 2019

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	85	0.6	11,529	27.6
11-49	295	2.1	7,750	18.6
1-10	13,730	97.3	22,439	53.8
Total	**14,110**	**100.0**	**41,718**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

As Table 11 shows, employment in the film and video distribution sector in 2019 was less concentrated in small workplaces than the production sector, with 82% of workers based in workplaces with 11 or more employees and 67% of workers based in workplaces with 50 or more employees.

Table 11 Numbers of employees in film and video distribution by size of workplace for the UK, 2019

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	20	3.8	3,890	66.9
11-49	40	7.6	872	15.0
1-10	465	88.6	1,056	18.2
Total	**525**	**100.0**	**5,818**	**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 94% of workers based in workplaces with 11 or more employees (Table 12). Unlike the film and video distribution sector, however, the majority (56%) of workers were based in workplaces with 11-49 employees.

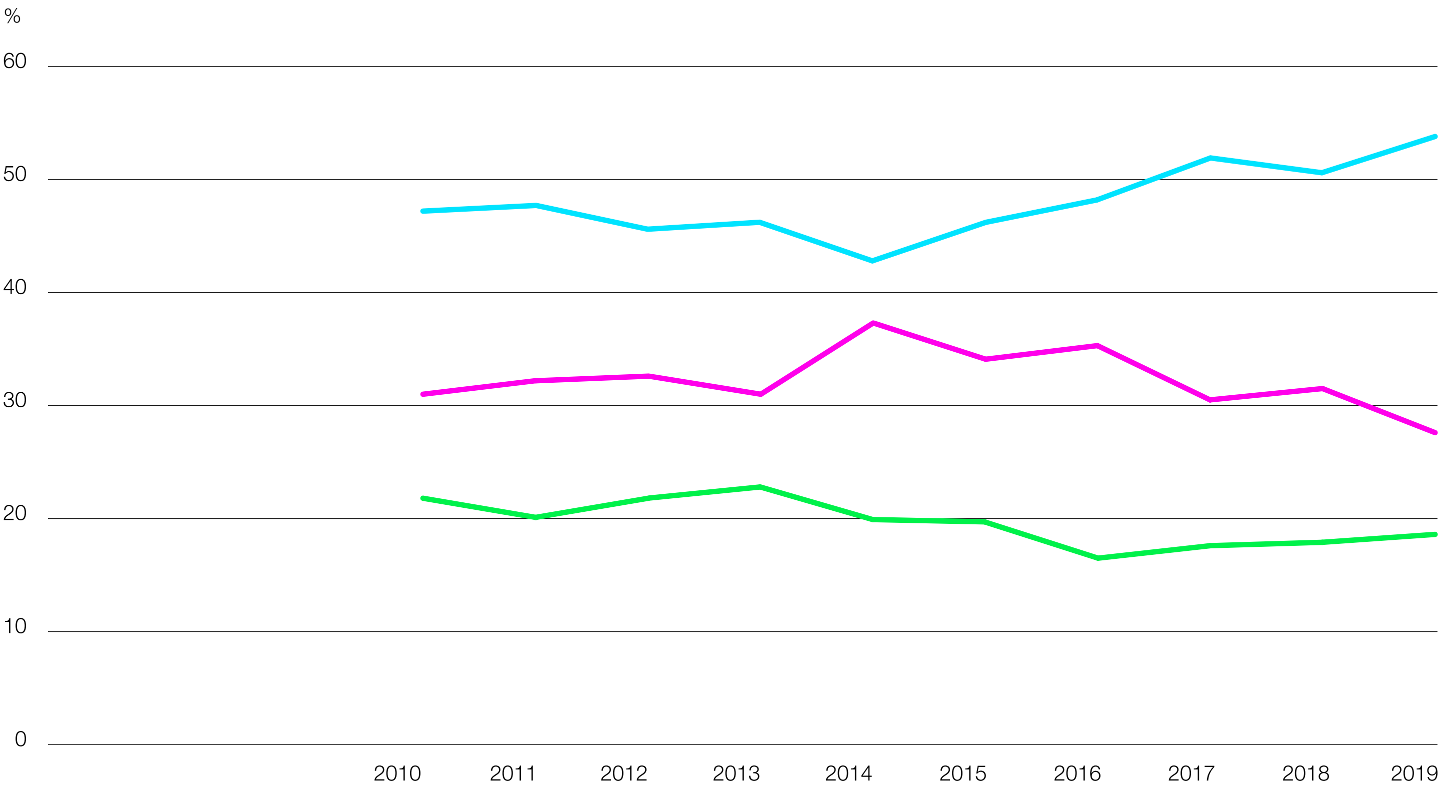
Table 12 Numbers of employees in film exhibition by size of workplace for the UK, 2019

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	115	13.7	7,892	38.0
11-49	430	51.2	11,651	56.1
1-10	295	35.1	1,240	6.0
Total	**840**	**100.0**	**20,783**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register
Note: Percentages may not sum to 100 due to rounding.

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 2010 to 2019. From 2014 the share of workplaces with 1-10 employees has been on a mostly upward trend, increasing from a 10-year low of 43% to 54% in 2019, while the share of workplaces with 50+ employees decreased from a 10-year high of 37% to 28% in 2019.

Figure 10 Film and video production employees by workplace size band, percentage of total, 2010-2019

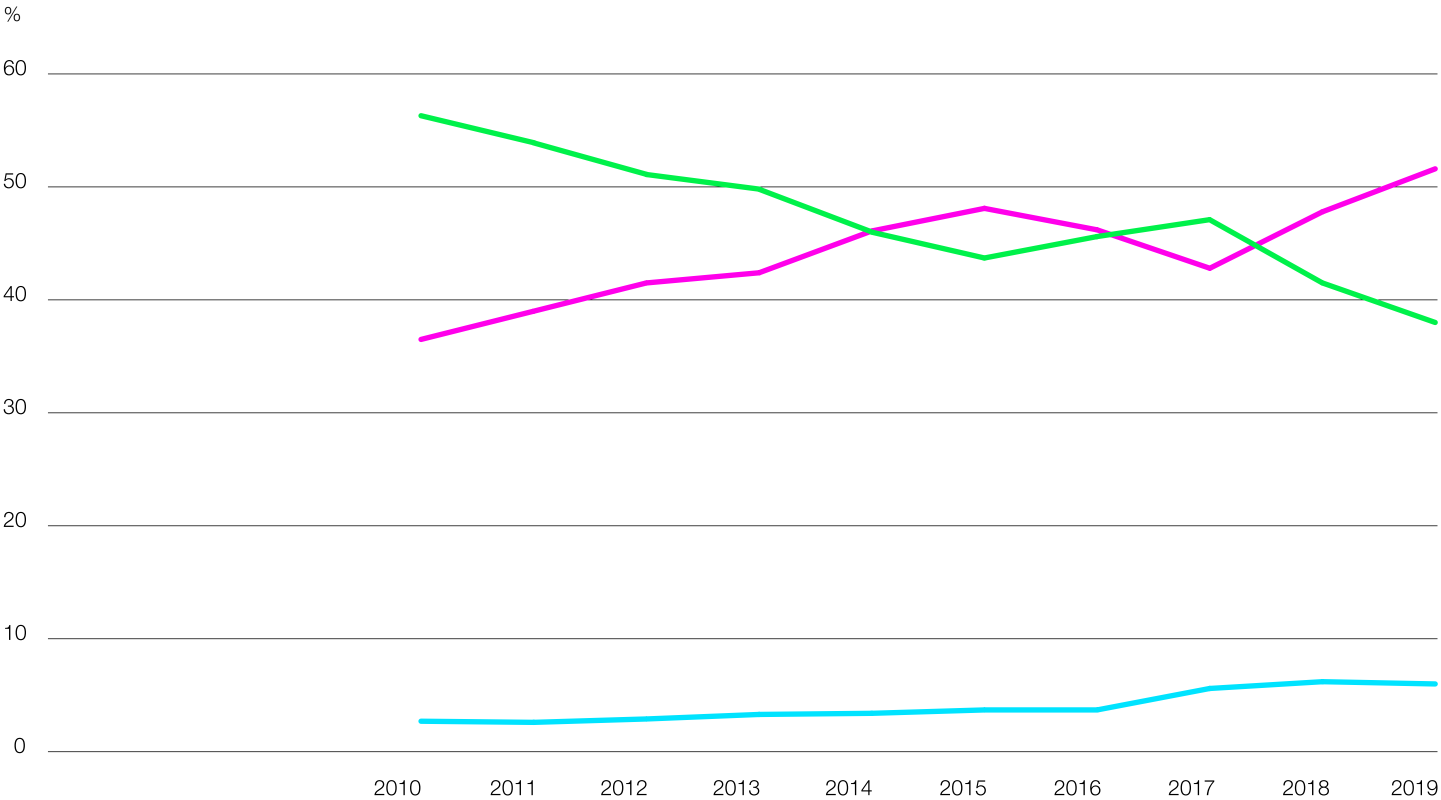


	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
1-10 employees	47.2	47.7	45.6	46.2	42.8	46.2	48.2	51.9	50.6	53.8
11-49 employees	21.8	20.1	21.8	22.8	19.9	19.7	16.5	17.6	17.9	18.6
50+ employees	31.0	32.2	32.6	31.0	37.3	34.1	35.3	30.5	31.5	27.6

Source: Office for National Statistics, Inter-Departmental Business Register

As Figure 11 shows, between 2010 and 2019, 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 workers found in the smallest workplace band (1-10 employees) has shown an upward trend over the period, rising from just under 3% in 2010 to 6% in 2019.

Figure 11 Film exhibition employees by workplace size band, percentage of total, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
1-10 employees	2.7	2.6	2.9	3.3	3.4	3.7	3.7	5.6	6.2	6.0
11-49 employees	41.0	43.5	46.0	46.9	50.6	52.6	50.7	47.3	52.3	56.1
50+ employees	56.3	53.9	51.1	49.8	46.0	43.7	45.6	47.1	41.5	38.0

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 2018 (the last year for which we have data), its direct contribution to Gross Domestic Product was £7 billion. Between 2015 and 2019, the number of companies involved in the industry increased by 28.5%. In 2019, film production companies represented 51% of companies and 32% of turnover.

- In 2018, the UK film industry had a turnover of £16.7 billion.
- The UK film industry's direct contribution to Gross Domestic Product (GDP) represented over 6% of the GDP of all the creative industries.
- The industry exported £2 billion worth of services in 2018, made up of £1.6 billion in royalties and £364 million in film production services.
- Exports in 2018 were 34% higher than in 2009.
- The UK film trade surplus in 2018 was £1.3 billion.
- In 2019, there were over 8,400 film production companies and almost 3,000 post-production companies in the UK.
- There were 430 film distributors and 275 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.
- Outside London and the South East, there were significant production and post-production clusters in the East of England, the South West and the North West.

Cover image: *The Secret Garden* courtesy of StudioCanal

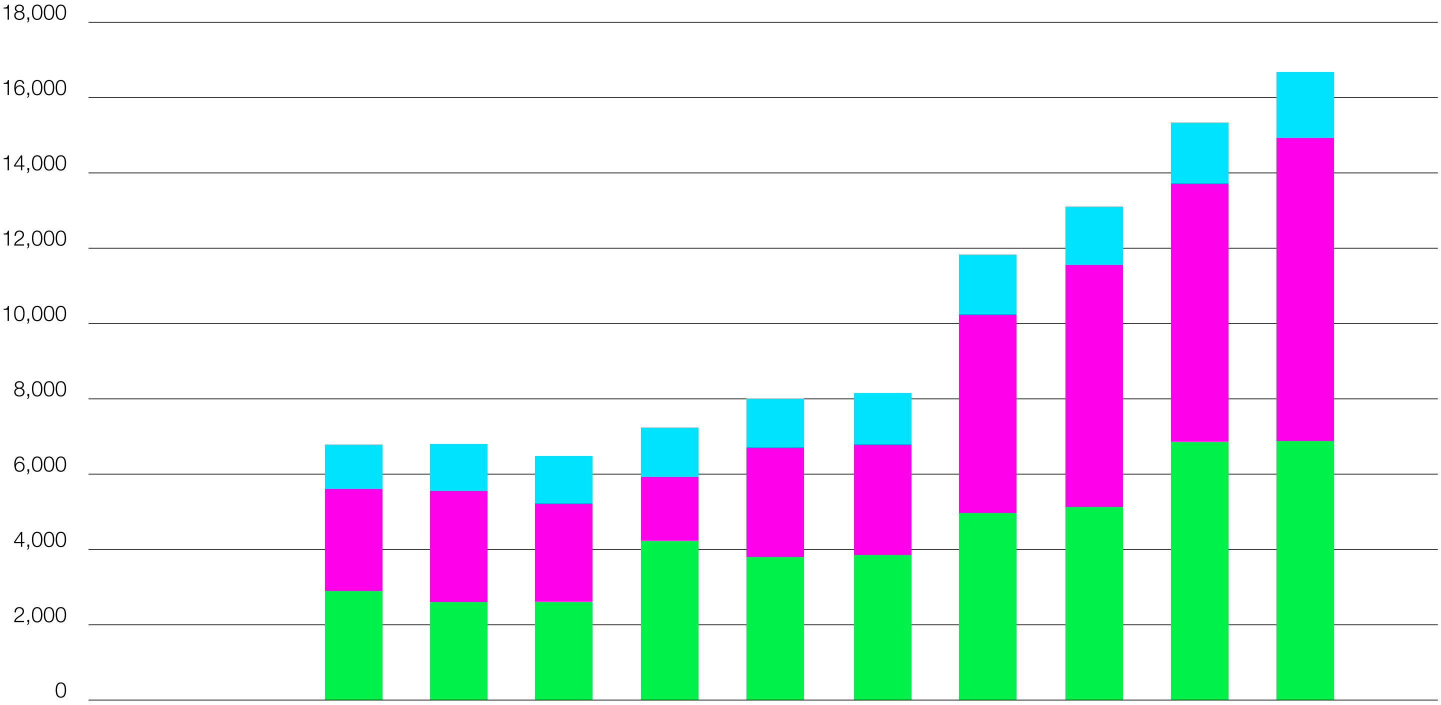
THE UK FILM ECONOMY

FILM INDUSTRY TURNOVER, 2009-2018

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 2009-2018. Each of the three sectors has shown growth over the decade, with total industry turnover increasing by 146% from £6.8 billion in 2009 to £16.7 billion in 2018, largely due to the increase in production and distribution turnover. However, for 2009, 2011 and 2012 the turnover for film and video distribution includes only film distribution as the data for video distribution are not disclosed to maintain confidentiality.

The chart shows that turnover for film distribution decreased substantially from £2.6 billion in 2011 to £1.7 billion in 2012 but, according to the Office for National Statistics, this is mainly due to the restructuring of some businesses and the resultant changes to their industrial classifications. (For details of the Standard Industrial Classification [SIC] framework, see the notes to Figure 1.) The reclassifications are contained within the SIC code 5913 (film, video and TV programme distribution). Between 2013 and 2018, the combined turnover for film and video distribution increased by 176% from £2.9 billion to £8.0 billion.

Figure 1 Total turnover of UK film industry by sector, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2009/2018
Film Exhibition	1,176	1,257	1,270	1,325	1,299	1,379	1,593	1,551	1,623	1,756	49.3
Film and video distribution	2,710	2,950	2,592	1,680	2,912	2,926	5,270	6,427	6,845	8,042	196.8
Film and video production (including post-production)	2,889	2,596	2,619	4,238	3,793	3,852	4,969	5,124	6,857	6,873	137.9
Total	**6,775**	**6,803**	**6,481**	**7,243**	**8,004**	**8,157**	**11,832**	**13,102**	**15,325**	**16,671**	**146.1**

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 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.
Data for 2016 and 2017 have been revised since publication of the 2019 Statistical Yearbook.

The 2007 SIC codes allow for a more detailed breakdown of industry turnover by sub-sector, as shown in Table 1. This gives an official measure of film production and distribution separate from video production and distribution. The figures reflect the high sunk costs associated with the production and marketing of feature films.

Table 1 Total turnover of UK film industry by sub-sector, 2018

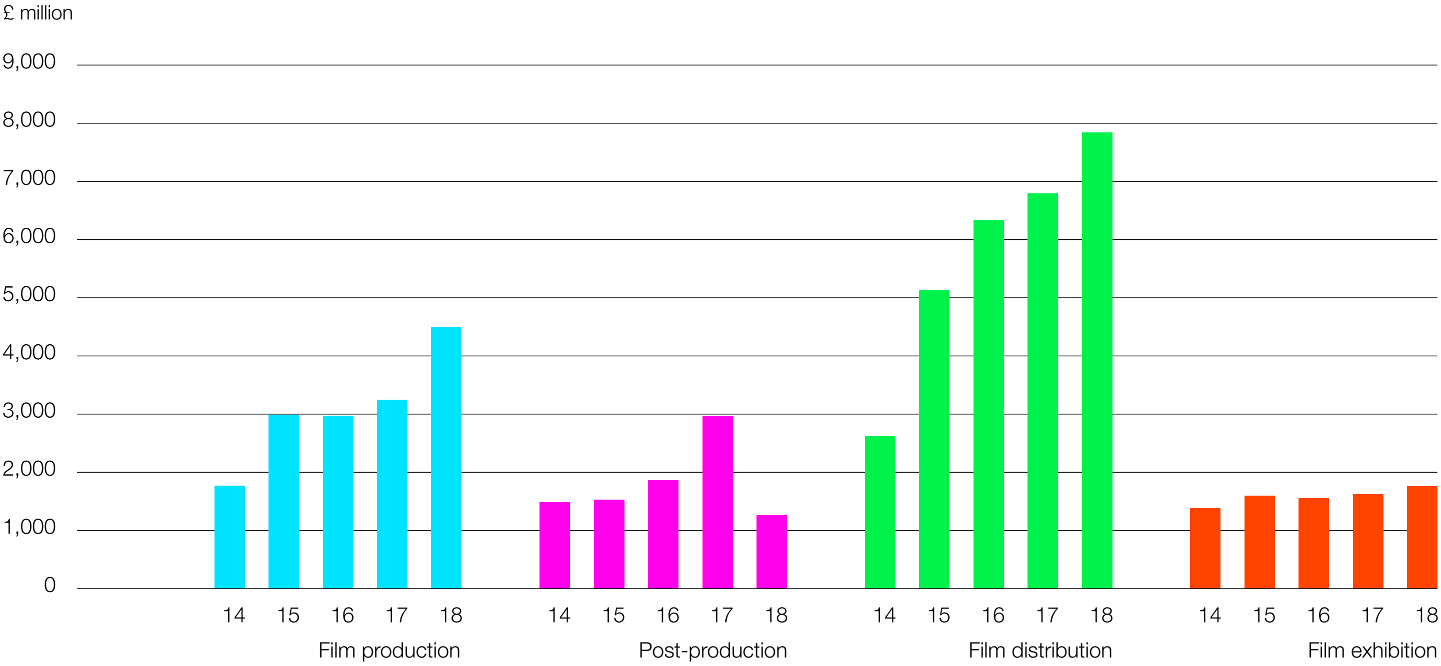
Sub-sector	Turnover (£ million)	% of total
Film production	4,493	27.0
Video production	1,116	6.7
Film, video and TV post-production	1,264	7.6
Film distribution	7,839	47.0
Video distribution	203	1.2
Film exhibition	1,756	10.5
Total	**16,671**	**100.0**

Source: Office for National Statistics Annual Business Survey

Note: Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Figure 2 shows the annual turnover of film production, film, video and TV post-production, film distribution and film exhibition from 2014 to 2018. Film distribution had the highest annual turnover of all film industry sub-sectors throughout the period and was the only sector to show consistent year-on-year increases. In addition to film distribution (15%), in 2018 both film production (38%) and film exhibition (8%) saw increased turnover compared with 2017, but film, video and TV post-production saw a significant decrease (-57%).

Figure 2 Total turnover of film sub-sectors, 2014-2018



	Film production	Post-production	Film distribution	Film exhibition
2014	1,769	1,480	2,615	1,379
2015	2,989	1,525	5,126	1,593
2016	2,968	1,859	6,340	1,551
2017	3,245	2,959	6,796	1,623
2018	4,493	1,264	7,839	1,756

Source: Office for National Statistics Annual Business Survey

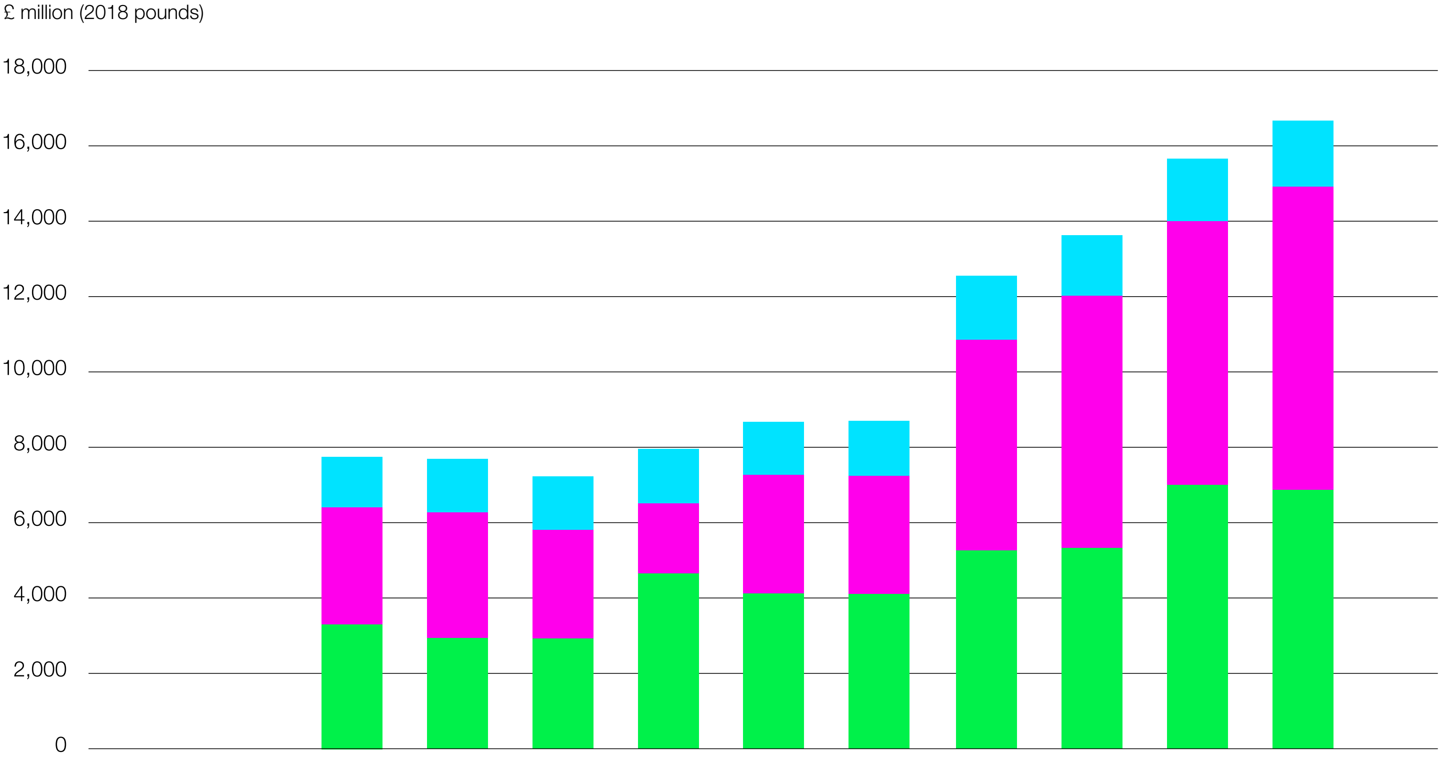
Notes:

See notes to Table 1.

Data for 2016 and 2017 have been revised since publication of the 2019 Statistical Yearbook.

Total industry turnover between 2009 and 2018 expressed in real terms, i.e. with the effects of inflation removed, is shown in Figure 3. The real increase since 2009 has been 160% for film and video distribution, 108% for film and video production (including post-production) and 30% for film exhibition. Overall, in real terms, the industry in 2018 was more than double its size in 2009.

Figure 3 Inflation-adjusted turnover of UK film industry by sector, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2009/2018
Film Exhibition	1,347	1,422	1,414	1,456	1,407	1,471	1,690	1,614	1,659	1,756	30.4
Film and video distribution	3,104	3,338	2,886	1,846	3,153	3,122	5,590	6,688	6,996	8,042	159.1
Film and video production (including post-production)	3,309	2,937	2,916	4,657	4,107	4,110	5,271	5,332	7,008	6,873	107.7
Total	**7,759**	**7,698**	**7,217**	**7,959**	**8,667**	**8,703**	**12,551**	**13,634**	**15,662**	**16,671**	**114.9**

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-2020-quarterly-national-accounts.

Values expressed in constant 2018 pounds.

For sector classifications, see notes to Figure 1.

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

Figures may not sum to totals due to rounding.

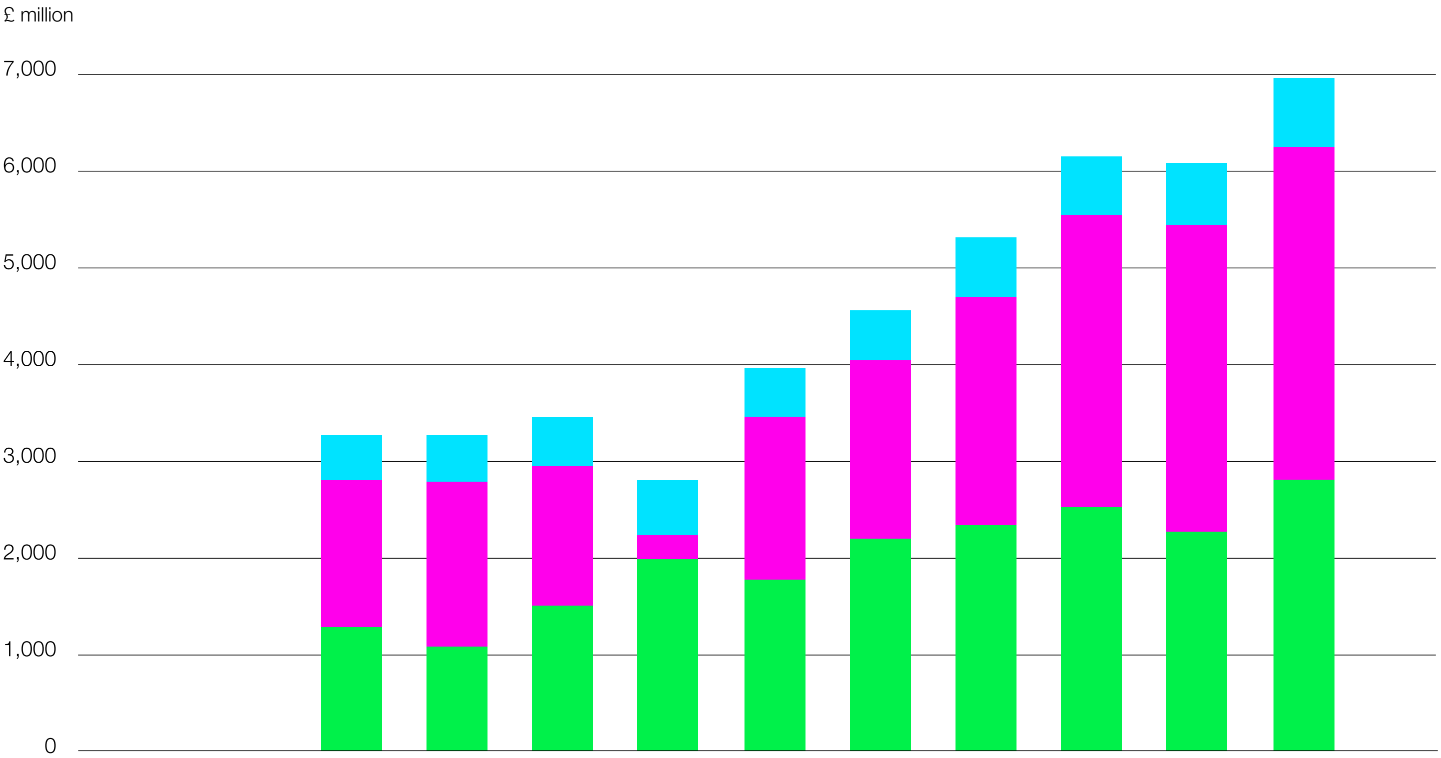
FILM INDUSTRY CONTRIBUTION TO GDP, 2009-2018

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 2018 was £7 billion (Figure 4). According to data published by the Government in November 2019, the GVA for all UK creative industries in 2018 was £111.7 billion, so film accounted for over 6% of all creative industries' value added.

In 2018, distribution accounted for 49% of total film industry GVA, production (including post-production) accounted for 40% and exhibition for 10%. (As with turnover, the value added for film distribution decreased significantly between 2011 and 2012 due to the reclassification of businesses in the distribution sector.) Between 2009 and 2018, total GVA for the film industry increased by 113%.

Figure 4 UK film industry gross value added, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2009/2018
Film Exhibition	466	483	505	567	511	513	616	601	639	716	53.6
Film and video distribution	1,517	1,706	1,442	249	1,680	1,848	2,360	3,023	3,170	3,436	126.5
Film and video production (including post-production)	1,275	1,071	1,495	1,976	1,766	2,187	2,325	2,513	2,261	2,799	119.5
Total	**3,258**	**3,260**	**3,442**	**2,792**	**3,957**	**4,548**	**5,301**	**6,137**	**6,070**	**6,951**	**113.4**

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

Data for 2016 and 2017 have been revised since publication of the 2019 Statistical Yearbook.

Table 2 shows the GVA breakdown in 2018 by the 2007 SIC codes. The Office for National Statistics reports zero gross value added for video production, which is primarily due to investments in projects that show returns in later years.

Table 2 UK film industry gross value added by sub-sector, 2018

Sub-sector	GVA (£ million)	% of total
Film production	1,931	27.8
Video production	0	-
Film, video and TV post-production	868	2.5
Film distribution	3,376	48.6
Video distribution	60	0.9
Film exhibition	716	0.3
Sector total	**6,951**	**100.0**

Source: Office for National Statistics Annual Business Survey

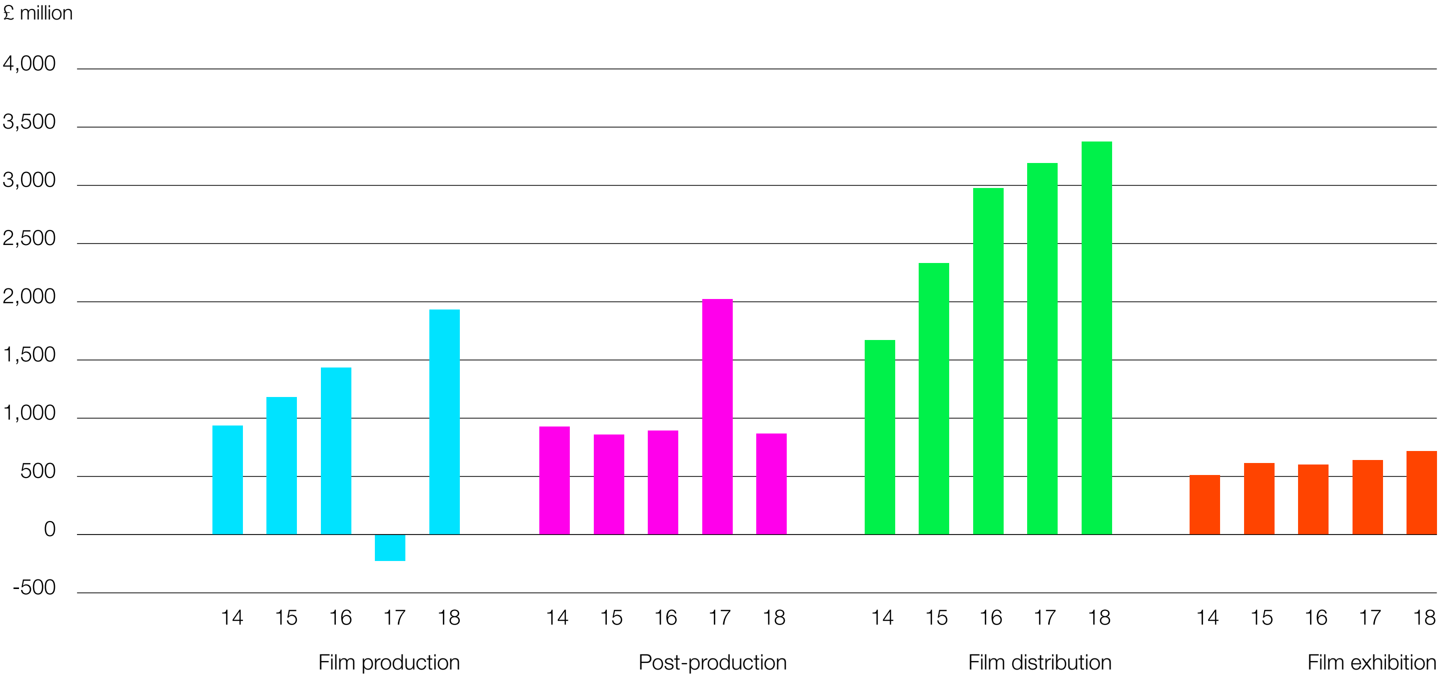
Notes:

Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

Percentages may not sum to 100 due to rounding.

Figure 5 shows the breakdown of GVA by sub-sector from 2014 to 2018. As with turnover, film distribution consistently had the highest value added over the period; it was the only sub-sector to see year-on-year increases in GVA, which rose from £1.7 billion in 2014 to £3.4 billion in 2018. Film production also saw a significant increase in GVA over the period, while GVA was broadly constant for film, video and TV post-production (with the exception of 2017) and film exhibition.

Figure 5 Gross value added of film sub-sectors, 2014-2018



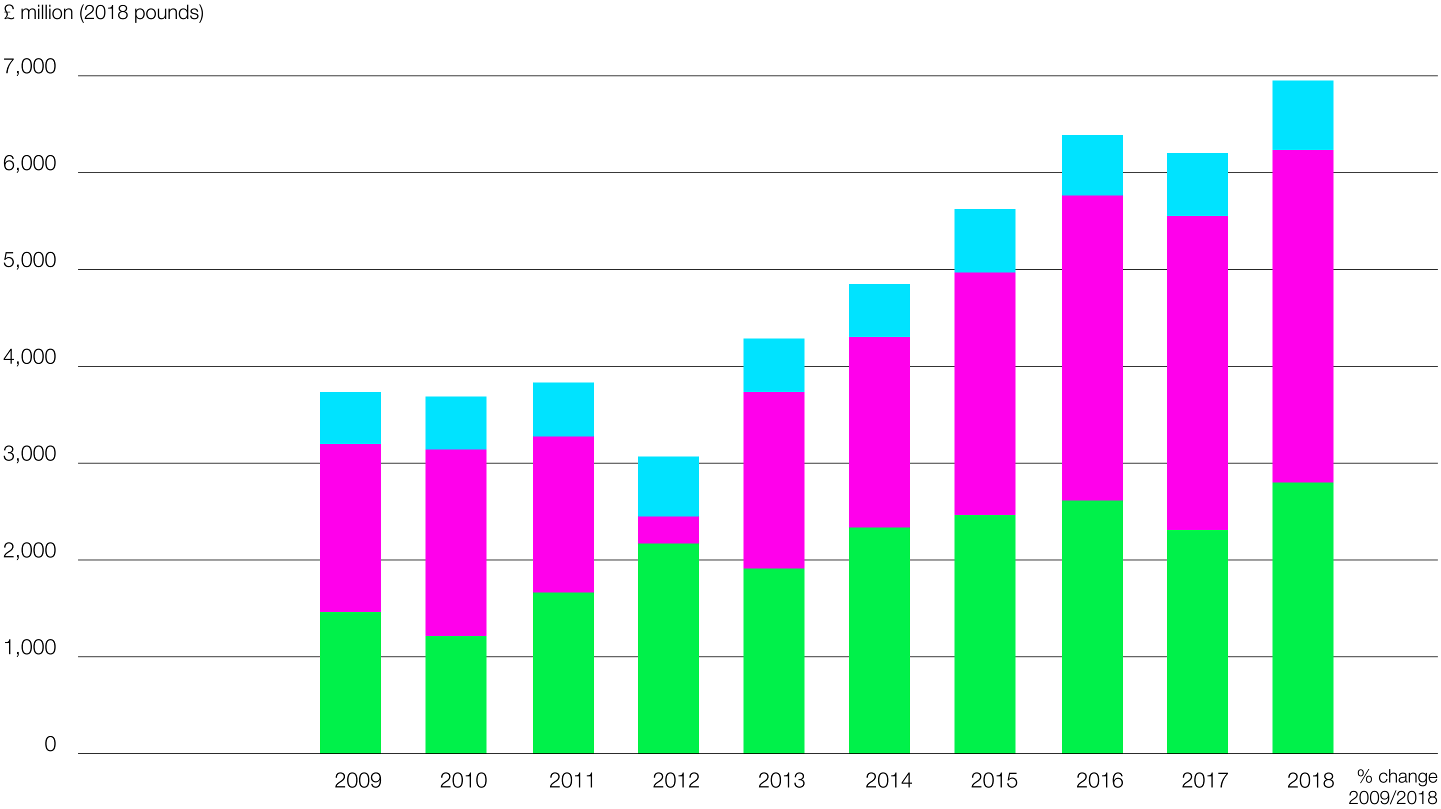
	Film production	Post-production	Film distribution	Film exhibition
2014	938	927	1,670	513
2015	1,183	857	2,334	616
2016	1,435	893	2,975	601
2017	-226	2,023	3,192	639
2018	1,931	868	3,376	716

Source: Office for National Statistics Annual Business Survey

See notes to Table 2.

Figure 6 shows the industry's value added expressed in real terms, i.e. with the effects of inflation removed. For the three years 2009 to 2011, real GVA was around £3.7 billion - £3.8 billion (in 2018 pounds) but decreased to £3 billion in 2012. The decrease was mainly due to the reduction in GVA for film distribution caused by the reclassification of companies within the distribution sector. However, the distribution element increased substantially in 2013. In real terms, GVA for the film industry as a whole in 2018 was 86% higher than in 2009.

Figure 6 UK film industry real gross value added, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2009/2018
Film Exhibition	534	547	562	623	553	547	653	625	653	716	34.1
Film and video distribution	1,737	1,930	1,606	274	1,819	1,972	2,503	3,146	3,240	3,436	97.8
Film and video production (including post-production)	1,460	1,212	1,665	2,171	1,912	2,333	2,466	2,615	2,311	2,799	91.7
Total	**3,731**	**3,689**	**3,833**	**3,068**	**4,285**	**4,853**	**5,623**	**6,386**	**6,204**	**6,951**	**86.3**

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-2020-quarterly-national-accounts.

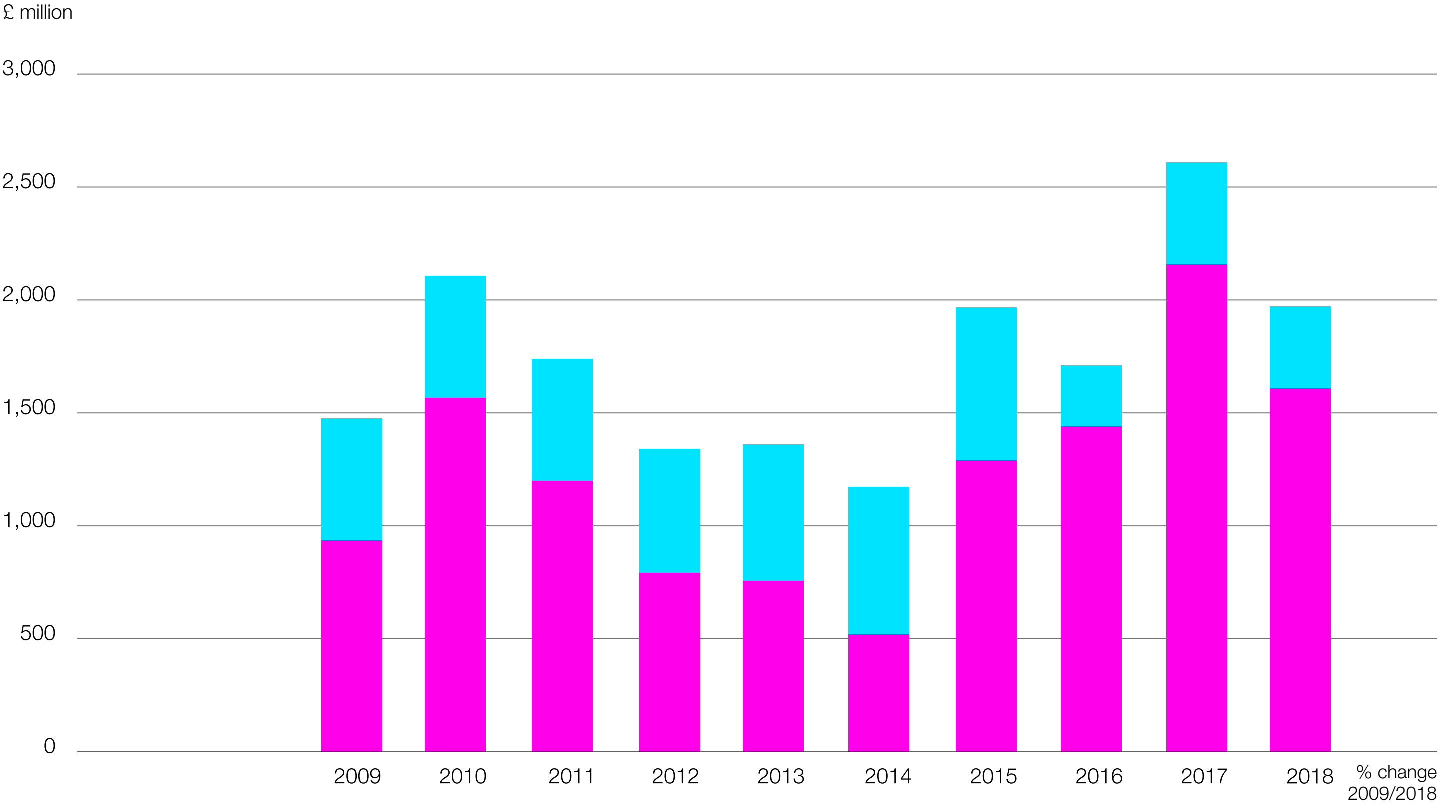
Values expressed in constant 2018 pounds.

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

FILM EXPORTS, 2009-2018

The UK film industry exported £2.0 billion worth of services in 2018 (the latest year for which data are available), of which £1.6 billion (82%) comprised royalties earned overseas from the exploitation of UK intellectual property and £0.4 billion (18%) comprised the sale of UK-based audiovisual and related services to foreign investors (Figure 7). The export value of intellectual property decreased by 25% compared with 2017, while the export value of audiovisual and related services decreased by 19%. While lower than the record high reported for 2017, the value of film exports in 2018 was 34% greater than in 2009.

Figure 7 UK film industry exports, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2009/2018
Audiovisual and related services	541	541	540	550	605	655	679	269	450	364	-32.7
Intellectual property	935	1,566	1,199	792	756	519	1,289	1,441	2,158	1,608	72
Total	**1,476**	**2,107**	**1,739**	**1,342**	**1,361**	**1,174**	**1,968**	**1,710**	**2,608**	**1,972**	**33.6**

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

Notes:

Data for 2019 is expected to be available at the end of January 2021.

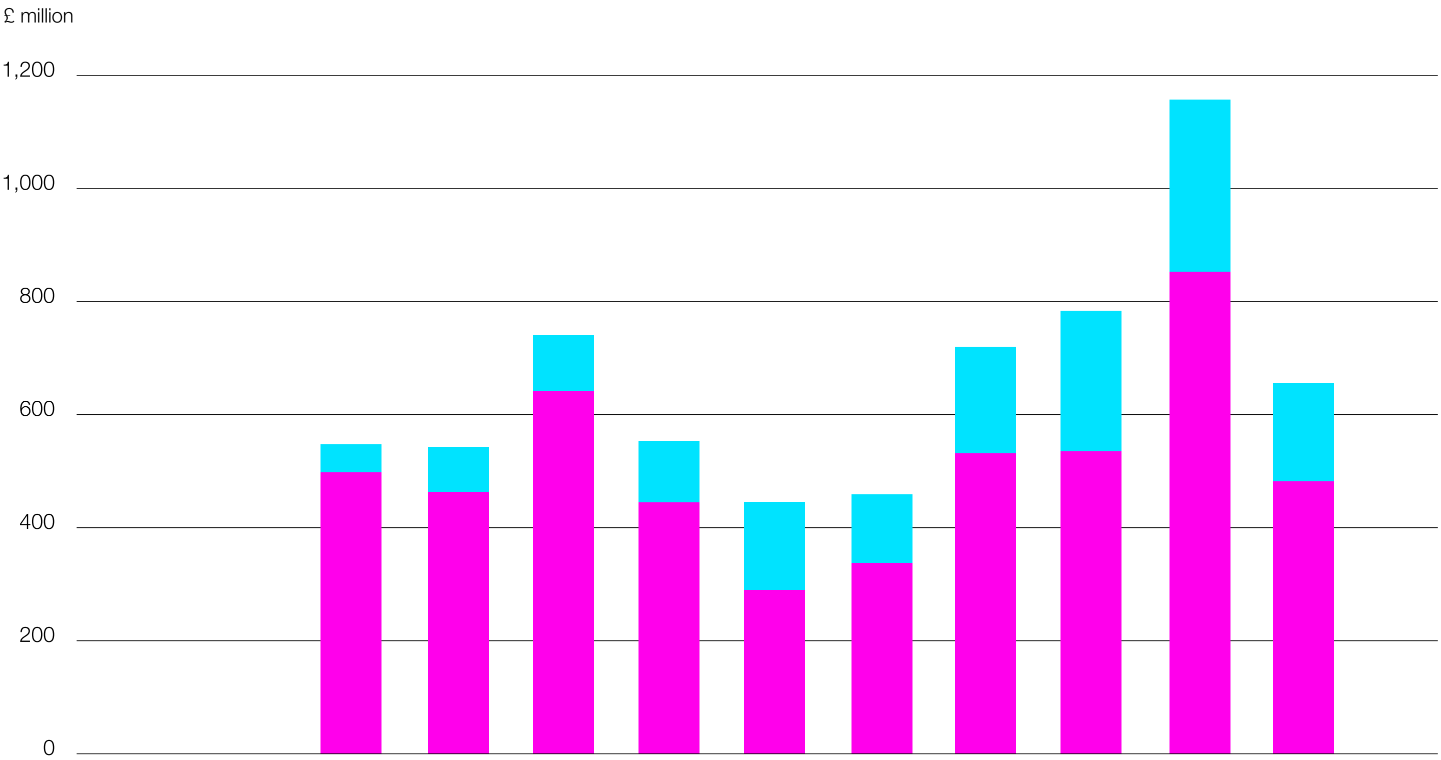
This chart shows the results for film companies only.

FILM IMPORTS, 2009-2018

The UK film industry imported £656 million worth of services in 2018, of which £482 million (73%) comprised intellectual property and £174 million (27%) comprised audiovisual and related services. Total imports were 43% lower than in 2017.

As Figure 8 shows, while royalties from intellectual property consistently make up the majority of imports, the share accounted for by audiovisual and related services has grown in recent years. One possible explanation for this increase 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, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2009/2018
Audiovisual and related services (£ million)	49	80	98	108	155	121	188	249	304	174	255.1
Intellectual property (£ million)	498	463	642	445	290	338	532	535	853	482	-3.2
Total	**547**	**543**	**740**	**553**	**445**	**459**	**720**	**784**	**1,157**	**656**	**19.9**

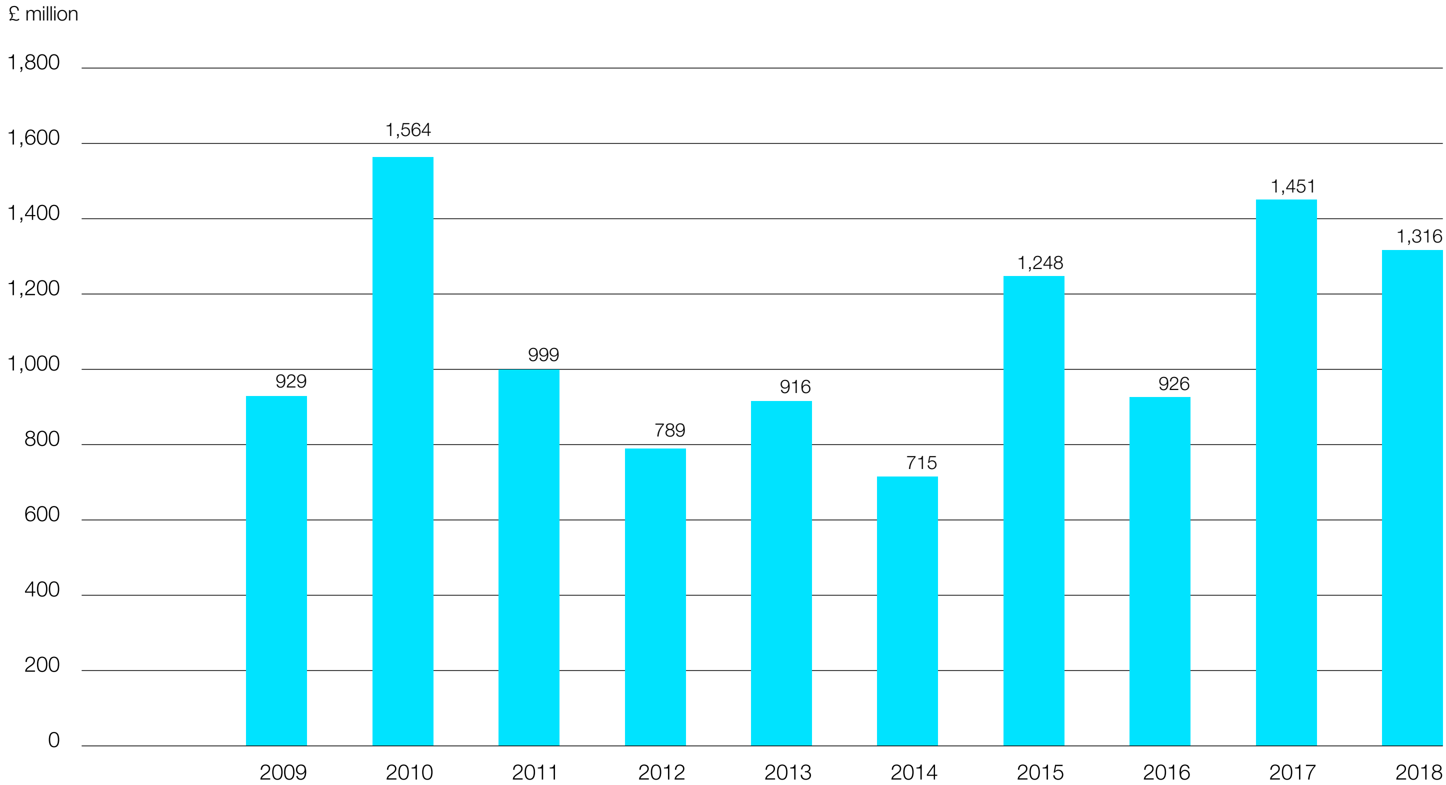
Source: Office for National Statistics Annual Survey of International Trade in Services

See notes to Figure 7.

THE FILM TRADE BALANCE, 2009-2018

The film industry made a continuous positive contribution to the UK balance of payments between 2009 and 2018, as Figure 9 shows. The trade surplus (positive balance of exports over imports) in 2018 was £1.3 billion, the third highest recorded surplus of the 10-year period.

Figure 9 Trade surplus of UK film industry, 2009-2018



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

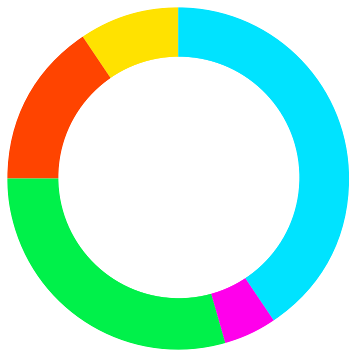
Note: 'Trade surplus' equals exports minus imports. Where a company (e.g. the UK subsidiary of a US major) receives income from another country on behalf of its parent company and subsequently passes it on to its parent company, this is recorded both as a receipt and a payment, leaving the measure of the trade surplus unaffected.

FILM EXPORT MARKETS

Figure 10 shows the geographic distribution of UK film exports for the years 2014-2018. The leading export destinations were the European Union (41%) and the USA (29.5%). Notably, Asia's share of exports was at a record high of 16%. Exports to European countries not in the EU accounted for 5% of the total, while the rest of the world accounted for 9%.

Figure 10 Destination of UK film exports as percentage of the total, 2014-2018

	%
EU	40.6
Other Europe	5.0
USA	29.5
Asia	15.6
Rest of the world	9.3
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

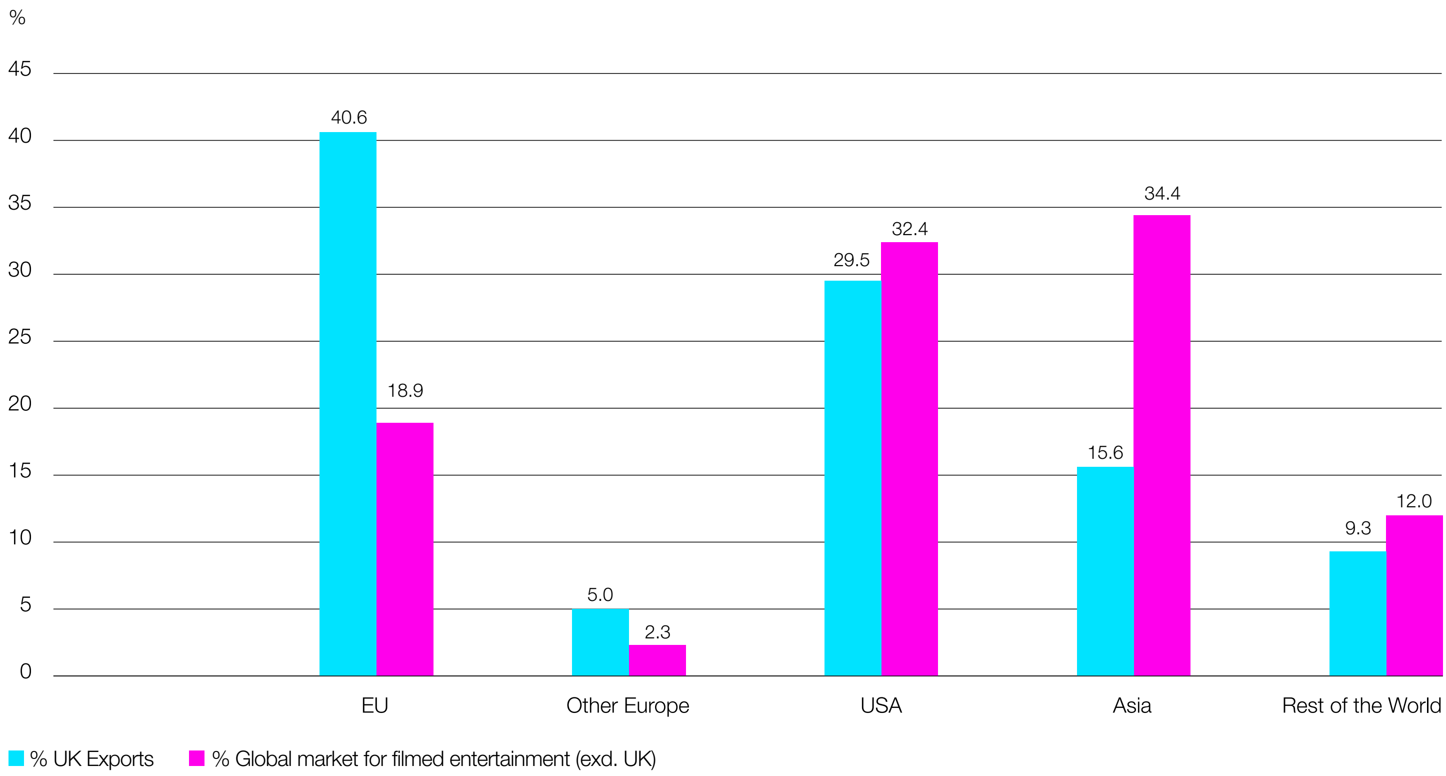
A useful comparison can be made between UK film export shares and the geographical distribution of the global market for filmed entertainment (Figure 12). For the EU and 'other Europe' the shares of UK exports were higher than the shares of the ex-UK global filmed entertainment market in those regions, whereas the reverse was true for the USA, Asia and 'rest of the world'. The differences that stand out are:

- The higher proportion of UK exports to the EU (41%) compared with the EU's 19% share of the ex-UK global filmed entertainment market; and

- The lower proportion of UK exports to Asia (16%) compared with the Asian countries' share of the ex-UK global market (34%).

The latter discrepancy reflects the strength of the main Asian countries (China, India, Japan and South Korea) in their own markets, and the consequent lower market shares for UK (and USA) films. There are also export restrictions in the Chinese market.

Figure 11 UK export shares, 2014-2018, compared with the global market for filmed entertainment, 2018



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 for 2014-2018 shows a similar pattern to that of exports, as shown in Table 3. The largest surpluses were with the EU and the USA. During the period, non-UK EU countries accounted on average for 46% of the UK's film trade surplus, while the USA accounted for 23%.

Table 3 International transactions of the UK film industry by geographical area, annual average, 2014-2018

	Exports (£ million)	Imports (£ million)	Balance (£ million)	% balance
EU	761.0	244.2	516.8	46.1
Other Europe	92.8	30.2	62.6	5.6
USA	552.8	298.8	254.0	22.7
Asia	293.0	77.2	215.8	19.3
Rest of the world	175.0	103.4	71.6	6.4
Total	**1,874.6**	**753.8**	**1,120.8**	**100.0**

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

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

Image: *Diego Maradona* courtesy of Altitude Distribution

FILM INDUSTRY COMPANIES, 2015-2019

This section details the size, turnover and geographical distribution of film industry companies in the UK. The data and date range differ from the estimates shown in the previous section as they are drawn from different sources.

Data on turnover

The data in this section are from the Inter-Departmental Business Register (IDBR), which is maintained by the Office for National Statistics (ONS). These data differ from the estimates shown in the first section in this chapter, 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 UK businesses, 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 28.5% between 2015 and 2019, compared to the UK all-industries average of 11% (Table 4). The majority of film industry 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 64%, while there was a 24% 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 2019, there were 8,415 film production companies, 2,970 film, video and TV post-production companies, 430 film distribution companies and 275 film exhibition companies.

Table 4 Number of companies by sub-sector, 2015-2019

Sub-sector	2015	2016	2017	2018	2019	Growth 2015-2019 (%)
Film production	6,805	7,420	8,115	8,165	8,415	23.7
Video production	2,545	2,980	3,390	3,735	4,185	64.4
Film, video and TV post-production*	2,660	2,870	2,965	2,915	2,970	11.7
Film distribution	420	380	395	420	430	2.4
Video distribution	85	75	80	90	105	23.5
Film exhibition	230	255	255	270	275	19.6
Total	**12,745**	**13,980**	**15,200**	**15,595**	**16,380**	**28.5**
UK all industries	2,449,415	2,554,510	2,668,810	2,669,440	2,718,435	11.0

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2019.

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, there were increases in company turnover in film production (104%), film distribution (227%) and film exhibition (27%) between 2015 and 2019, but a fall in turnover for film, video and TV post-production (-7%). Total turnover for film industry companies increased by 108.5% over the period, rising from £9.1 billion to £19 billion.

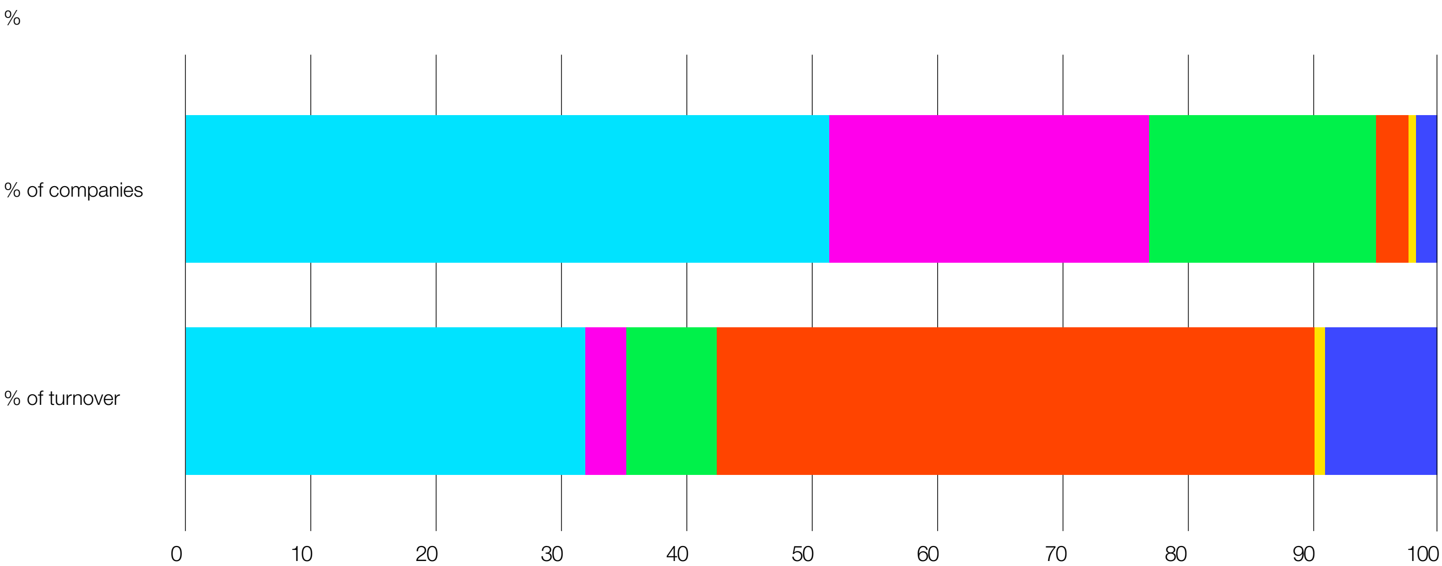
Table 5 Turnover of companies by sub-sector, £ million, 2015-2019

Sub-sector	2015	2016	2017	2018	2019	Growth 2015-2019 (%)
Film production	2,967.3	3,833.1	4,509.4	6,102.6	6,062.1	104.3
Video production	357.1	397.6	477.4	534.5	624.2	74.8
Film, video and TV post-production	1,477.6	1,309.1	1,800.6	1,844.1	1,370.4	- 7.3
Film distribution	2,776.2	4,306.2	4,871.3	6,788.4	9,069.5	226.7
Video distribution	187.7	233.5	190.8	129.5	152.8	- 18.6
Film exhibition	1,339.3	1,405.0	1,593.1	1,614.9	1,704.1	27.2
Total	**9,105.2**	**11,484.4**	**13,442.6**	**17,013.9**	**18,983.0**	**108.5**

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 3% of film industry companies in 2019 but accounted for 48% 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 just under one third (32%) of turnover.

Figure 12 Percentage of film and video companies and turnover by sub-sector, 2019



Film production	51.4	31.9
Video production	25.5	3.3
Film, video and TV post-production	18.1	7.2
Film distribution	2.6	47.8
Video distribution	0.6	0.8
Film exhibition	1.7	9.0

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 2019 is shown in Tables 6 to 9. In all sectors the majority of companies were very small with an annual turnover of less than £250,000.

Table 6 Size distribution of film production companies, 2019

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	200	2.4	c	c
1.0-4.99	415	4.9	821.0	13.5
0.5-0.99	335	4.0	225.4	3.7
0.25-0.49	695	8.3	232.9	3.8
0.1-0.24	2,885	34.3	411.6	6.8
0.05-0.09	2,055	24.4	155.3	2.6
<0.05	1,835	21.8	c	c
Total	**8,415**	**100.0**	**6,062.1**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2019.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Number/percentage share of companies may not sum to totals due to rounding.

Table 7 Size distribution of post-production companies, 2019

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	50	1.7	781.2	57.0
1.0-4.99	105	3.5	232.9	17.0
0.5-0.99	120	4.0	82.1	6.0
0.25-0.49	165	5.6	57.6	4.2
0.1-0.24	665	22.4	97.9	7.1
0.05-0.09	1,285	43.3	104.4	7.6
<0.05	575	19.4	14.3	1.0
Total	**2,970**	**100.0**	**1,370.4**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2019.

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

Table 8 Size distribution of film distribution companies, 2019

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	40	9.3	8,947.3	98.7
1.0-4.99	30	7.0	c	c
0.5-0.99	35	8.1	c	c
0.25-0.49	50	11.6	16.9	0.2
0.1-0.24	90	20.9	14.0	0.2
0.05-0.09	75	17.4	5.5	0.1
<0.05	110	25.6	1.7	<0.1
Total	**430**	**100.0**	**9,069.5**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2019.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Percentages may not sum to 100 due to rounding.

Table 9 Size distribution of film exhibition companies, 2019

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	15	5.5	1,546.7	90.8
1.0-4.99	55	20.0	105.4	6.2
0.5-0.99	35	12.7	25.7	1.5
0.25-0.49	35	12.7	12.9	0.8
0.1-0.24	65	23.6	9.9	0.6
0.05-0.09	35	12.7	2.4	0.1
<0.05	35	12.7	1.1	0.1
Total	**275**	**100.0**	**1,704.1**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2019.

Percentages may not sum to 100 due to rounding.

NATIONAL/REGIONAL DISTRIBUTION OF FILM COMPANIES IN THE UK

Tables 10 and 11 show the national/regional distribution of film companies and film company turnover in 2019. In total, 70% of film companies were concentrated in London and the South East, and 79% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (60.5% of companies and 99% of turnover) but the exhibition sector was more widely spread across the UK, with 73% 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, 2019

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
England	7,930	94.2	2,795	94.1	410	95.3	230	83.6	11,365	94.0
London	4,570	54.3	1,505	50.7	260	60.5	75	27.3	6,410	53.0
South East	1,375	16.3	550	18.5	70	16.3	40	14.5	2,035	16.8
East	630	7.5	220	7.4	25	5.8	25	9.1	900	7.4
South West	470	5.6	185	6.2	15	3.5	25	9.1	695	5.7
North West	255	3.0	120	4.0	15	3.5	20	7.3	410	3.4
Yorkshire and The Humber	225	2.7	65	2.2	5	1.2	15	5.5	310	2.6
West Midlands	185	2.2	70	2.4	15	3.5	15	5.5	285	2.4
East Midlands	150	1.8	55	1.9	5	1.2	10	3.6	220	1.8
North East	70	0.8	25	0.8	0	-	5	1.8	100	0.8
Scotland	235	2.8	85	2.9	10	2.3	15	5.5	345	2.9
Wales	175	2.1	65	2.2	5	1.2	20	7.3	265	2.2
Northern Ireland	75	0.9	25	0.8	5	1.2	10	3.6	115	1.0
UK	**8,415**	**100.0**	**2,970**	**100.0**	**430**	**100.0**	**275**	**100.0**	**12,090**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2019.

The overall total differs from that in Table 4 as it excludes figures for video production and distribution.

Count of companies is rounded to the nearest five for disclosure reasons.

Percentages may not sum to 100 due to rounding.

Table 11 National/regional distribution of film company turnover, 2019

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£ million)	%	Turnover (£ million)	%	Turnover (£ million)	%	Turnover (£ million)	%	Turnover (£ million)	%
England	5,750	94.9	1,316	96.0	9,060	99.9	1,647	96.7	17,773	97.6
London	3,863	63.7	1,040	75.9	8,956	98.8	994	58.3	14,853	81.6
South East	510	8.4	123	8.9	29	0.3	15	0.9	677	3.7
East	965	15.9	c	c	45	0.5	c	c	1,061	5.8
South West	177	2.9	40	2.9	c	c	29	1.7	c	c
North West	75	1.2	c	c	8	0.1	c	c	83	0.5
Yorkshire and The Humber	92	1.5	13	0.9	c	c	9	0.5	c	c
West Midlands	34	0.6	10	0.7	c	c	3	0.2	c	c
East Midlands	24	0.4	c	c	c	c	c	c	c	c
North East	10	0.2	c	c	c	c	c	c	13	0.1
Scotland	49	0.8	24	1.7	c	c	c	c	136	0.7
Wales	68	1.1	c	c	c	c	c	c	68	0.4
Northern Ireland	195	3.2	c	c	c	c	34	2.0	230	1.3
UK	**6,062**	**100.0**	**1,370**	**100.0**	**9,069**	**100.0**	**1,704**	**100.0**	**18,206**	**100.0**

Source: Office for National Statistics, Inter-Departmental Business Register

Notes:

Data as at March 2019.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

The geographic distribution of turnover is given by the location of the company, not its local units, so a London concentration may be overstated for companies such as cinema chains which have local units around the UK.

The overall total differs from that in Table 5 as it excludes figures for video production and distribution.

Percentages may not sum to 100 due to rounding.

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 Office for National Statistics, these are 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 figures for 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.co.uk)

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

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), an administrative classification used to establish the boundaries of Regional Development Agencies and 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 franchise

A film series such as Harry Potter and the Philosopher's Stone and its sequels

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

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 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 (e.g. 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 and must be a drama (which includes comedy) or documentary production intended for broadcast on television and/or the internet with 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: NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group (this now includes the properties of the Fox Entertainment Group which was acquired by Disney in early 2019), 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.

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

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

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

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 preserving the integrity, voice and vision of the film

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

Specialised films

Generally, non-mainstream films. This category includes foreign language and subtitled films, feature documentaries, re-releases of classic films, 'arthouse' productions and films aimed at niche audiences

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: NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group (this now includes the properties of the Fox Entertainment Group which was acquired by Disney in early 2019), 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

A cinema generally with fewer than five screens and that shows more mainstream product. Often an older building located in city centres or suburbs

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 Digital, 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

Worldwide box office

Refers to the box office across all global territories and total global box office revenues. Within this Yearbook, worldwide box office is used interchangeably with global box office

SOURCES

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Ampere Analysis; *SVoD catalogue 2019*

BFI; *Certification*

BFI; *Collections and Information Database*

BFI; *Film Fund*

BFI; *Future Skills*

BFI; *Research and Statistics Unit*

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ScreenSkills

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