SCREEN SECTOR PRODUCTION

CONTENTS

FACTS IN FOCUS

The combined spend on film and high-end television (HETV) production in the UK reached a record high in 2021, led primarily by a surge in investment from international HETV projects.

- The combined value of all film and HETV production activity in the UK in 2021 was £5.64 billion, up from £3.12 billion in 2020.
- The value of film production activity in the UK in 2021 was £1.55 billion, up from £1.51 billion in 2020; £1.33 billion of this spend (86%) was attributed to inward investment and co-production projects.
- Sixteen big budget films (£30 million or over) accounted for 73% of total UK film production spend. All of these films were inward investment projects.
- The value of HETV production activity in the UK in 2021 was £4.09 billion, up from £1.60 billion in 2020; £3.44 billion of this spend (84%) was attributed to inward investment and co-production projects.
- Eighty-nine HETV projects backed by the major streaming platforms began production in 2021, accounting for 68% of the total UK spend for HETV productions.
- Thirty-four feature-length HETV projects began production in 2021, accounting for 18% of the total UK spend for HETV productions.
- The total UK spend for UK qualifying animation programmes beginning production between 2017 and 2021 was £419 million.
- The total UK spend for UK qualifying children's TV programmes beginning production between 2017 and 2021 was £467 million.
- The total UK spend for UK qualifying video games beginning development between 2017 and 2021 was £1.88 billion.

Screen sector production

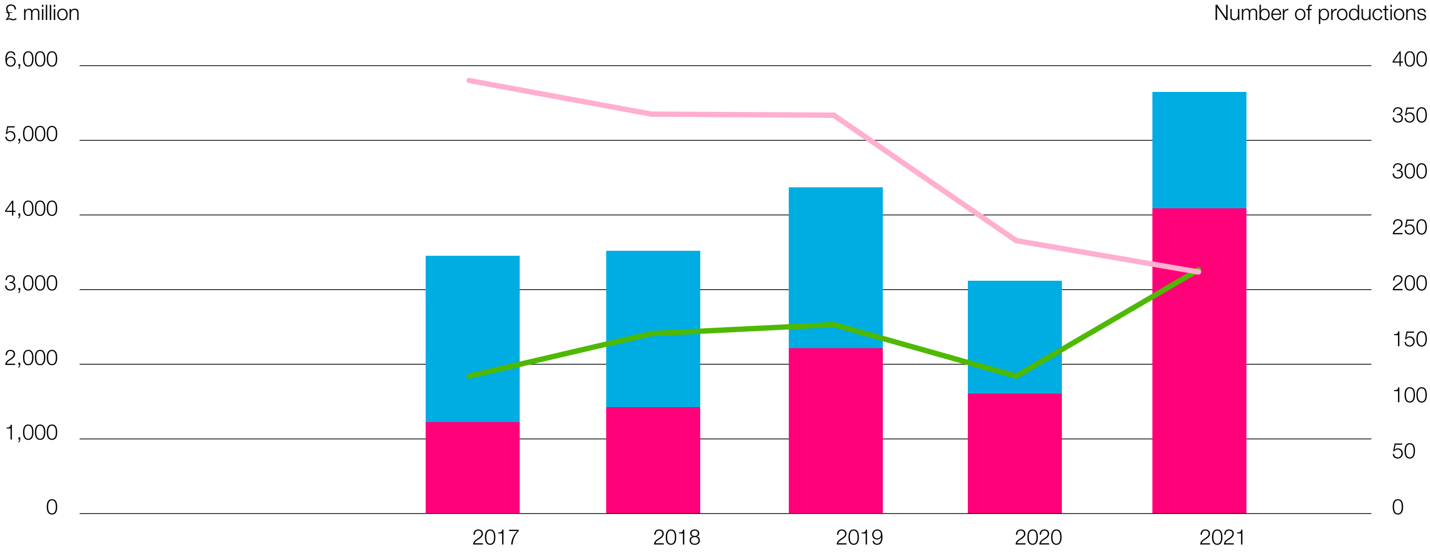
Film and high-end television

In 2021, the spend on feature film and high-end television (HETV) production in the UK reached a record high of £5.64 billion. As Figure 1 shows, this combined total is 81% greater than in 2020 and 29% up on the previous peak achieved in 2019. This record level of UK spend points to the strength of the recovery in the production sector as the country emerged from the COVID-19 pandemic, and underscores the importance of the UK as a global centre of production for the screen industries. (Inward investment projects accounted for 84% of the total UK spend for film and HETV production in 2021.)

For the third consecutive year, the share of aggregate UK spend associated with HETV production was greater than for film production. HETV projects generated 72% of the combined production value in 2021. It should be noted, however, that the distinction between film and HETV productions can appear arbitrary. Feature-length projects primarily intended for release on streaming platforms, including those that may receive some form of theatrical release, are classified as HETV productions for the purposes of UK tax relief. The UK production value associated with these projects in 2021 was £734 million, a record 18% of the overall investment in HETV production in the UK (Table 1). There were 34 such projects in 2021, including *Catherine Called Birdy* (Amazon Prime Video), *Roald Dahl's Matilda the Musical* (Netflix) and *Pinocchio* (Disney+).

In total, 420 feature films and HETV projects began principal photography in the UK in 2021, an increase from 353 in 2020 but still below the figures achieved between 2017 and 2019. It should be noted, however, that as HETV projects can be either single productions or series, numbers here can be misleading. In addition, 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, 2017-2021



	2017	2018	2019	2020	2021
UK spend film (£ million)	2,221.9	2,091.6	2,152.6	1,511.8	1,554.3
UK spend HETV (£ million)	1,224.3	1,420.3	2,213.9	1,604.7	4,085.6
Total UK spend (£ million)	**3,446.2**	**3,511.9**	**4,366.5**	**3,116.5**	**5,640.0**
Number of film productions	380	350	349	237	209
Number of HETV productions	116	154	162	116	211
Total number of productions	**496**	**504**	**511**	**353**	**420**

Source BFI
Notes:
Productions are allocated to the year principal photography commenced; an HETV production can be a single programme or a television series.
Figures for recent years may be amended in the future as more production data become available. In the 2021 Statistical Yearbook, for example, the total number of film and HETV production starts reported for 2020 was 231; this has now been revised to 353.

Table 1 Value and volume of feature-length HETV productions, 2017-2021

	2017	2018	2019	2020	2021
UK spend of feature-length HETV productions (£ million)	114.0	36.4	276.6	117.6	734.0
Total UK spend of HETV productions (£ million)	1,224.3	1,420.3	2,213.9	1,604.7	4,085.6
Feature-length HETV productions as % of total	9.3	2.6	12.5	7.3	18.0
Number of feature-length HETV productions	13	12	14	18	34
Number of HETV productions	116	154	162	116	211
Feature-length HETV productions as % of total	11.2	7.8	8.6	15.5	16.1

Source: BFI
Note: A ‘feature-length HETV production’ is defined here as a programme intended for broadcast (including the internet) with a duration of 70 minutes or longer, which is not divided into episodes, and which excludes pilot episodes and specials.

The value of UK film production, 2012-2021

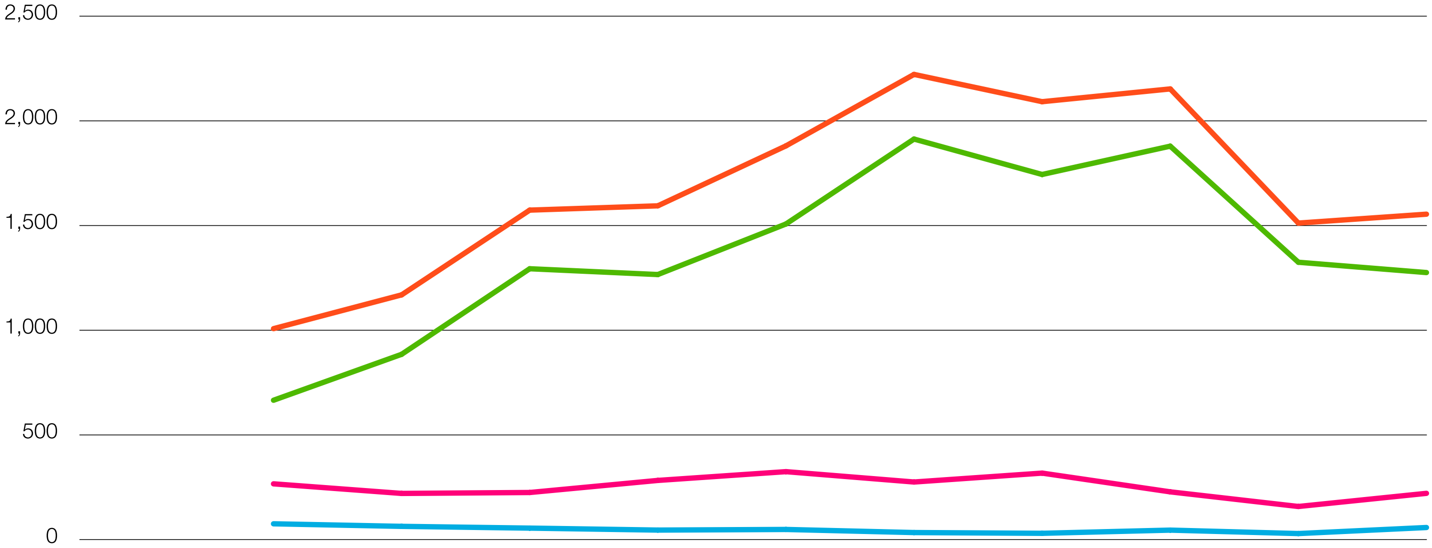
As Figure 2 shows, the total UK spend of feature films that began principal photography in 2021 was £1.55 billion, up 3% compared with 2020 (£1.51 billion) but down 28% compared with 2019 (£2.15 billion). As noted, there is often a delay in acquiring full data on production activity in the UK, so values for the most recent years are expected to be revised upwards.

According to our current data, inward investment films contributed £1.28 billion towards the total UK production spend in 2021, a decrease of 4% from £1.32 billion in 2020, and the lowest level of UK production value associated with these films since 2015. The proportion of overall UK spend attributed to inward investment productions in 2021 was 82%, down from 88% in 2020. Inward features shooting in the UK in 2021 included *Ant-Man and the Wasp: Quantumania*, *The Batman* and *Ganapath – Part 1*.

Domestic UK features shooting in 2021, which included *Enys Men*, *The Lost King* and *Save the Cinema*, had a UK production value of £221 million, up 40% from £158 million in 2020. These figures do not reflect the fact that many films made by home-grown filmmakers attract international finance and are therefore classified as inward investment films, such as the 2021 productions *Men* (written and directed by Alex Garland) and *Downton Abbey: A New Era* (written by Julian Fellowes and directed by Simon Curtis).

The UK spend of official and un-official co-productions in 2021 was £58 million, up from £29 million in 2020, and the highest total since 2013. Co-productions commencing principal photography in the year included *The Canterville Ghost, The Silent Twins* and *The Son*.

Figure 2 UK spend of feature films produced in the UK, 2012-2021



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Inward Investment	665.6	885.0	1,293.7	1,266.0	1,507.4	1,913.1	1,743.9	1,879.2	1,324.7	1,275.5
Domestic UK	266.4	220.6	225.0	282.7	324.6	275.1	317.6	228.1	158.2	221.0
Co-production	75.5	63.3	54.9	45.5	48.5	33.7	30.1	45.3	28.9	57.8
Total	**1,007.5**	**1,168.9**	**1,573.7**	**1,594.2**	**1,880.5**	**2,221.9**	**2,091.6**	**2,152.6**	**1,511.8**	**1,554.3**

Source: BFI RSU

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 less than £500,000.

Data updated since publication of the 2021 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 2 distinguishes UK studio-backed films from UK and non-UK originated independent films made partly or wholly in the UK. In 2021, UK studio-backed films accounted for 64% (£992 million) of overall production spend in the UK, a decrease from 73% (£1.1 billion) in 2020. Between 2012 and 2021, the average share of total UK spend attributed to UK studio-backed films was 67%.

Table 2 UK spend of UK studio-backed and independent films produced in the UK, 2012-2021, £ million

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
UK studio-backed films*	654.2	758.1	1,010.2	1,186.7	1,186.9	1,570.7	1,429.8	1,412.5	1,098.5	991.8
Independent films**	353.3	410.8	563.5	407.5	693.6	651.2	661.8	740.1	413.3	562.5
Total	**1,007.5**	**1,168.9**	**1,573.7**	**1,594.2**	**1,880.5**	**2,221.9**	**2,091.6**	**2,152.6**	**1,511.8**	**1,554.3**
% UK studio-backed films	64.9	64.9	64.2	74.4	63.1	70.7	68.4	65.6	72.7	63.8

Source: BFI

Notes:

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

** Films produced without significant 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.

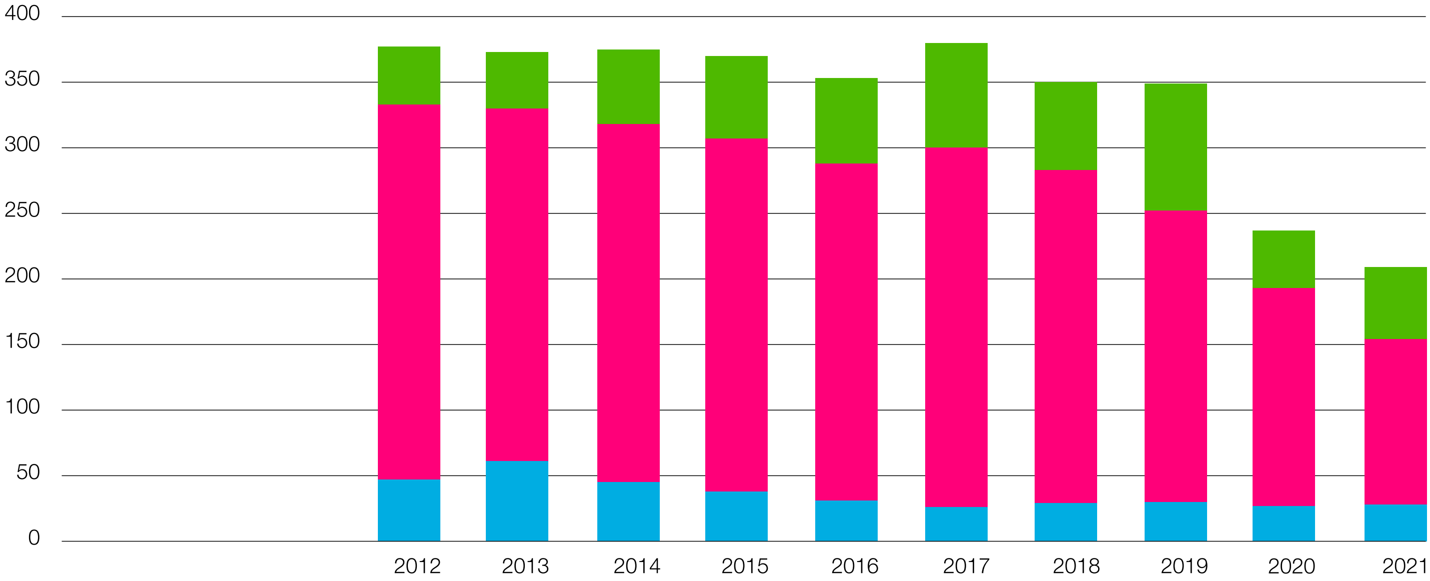
Data updated since publication of the 2021 Statistical Yearbook.

The volume of UK film production, 2012-2021

In 2021, 209 films were produced wholly or partly in the UK, down from 237 in 2020. Of these, 55 were inward investment features, 126 were domestic UK features (of which 75 had budgets of £500,000 or over) and 28 were co-productions (Figure 3). While the total number of films entering production was lower than in 2020, there were increases in all production categories with the exception of domestic UK films with budgets of less than £500,000, which fell from 110 in 2020 to 51. However, as previously noted, there is often a delay in acquiring full data on production activity in the UK, particularly in the case of low and micro-budget features, so these numbers are likely to be revised upwards.

Image: *The Lost King* courtesy of Pathé UK

Figure 3 Number of feature films produced in the UK, 2012-2021



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Inward investment	44	43	57	63	65	80	67	97	44	55
Domestic UK	286	269	273	269	257	274	254	222	166	126
Of which budget ≥£500k	77	70	83	97	100	90	105	69	56	75
Of which budget <£500k	209	199	190	172	157	184	149	153	110	51
Co-production	47	61	45	38	31	26	29	30	27	28
Total	**377**	**373**	**375**	**370**	**353**	**380**	**350**	**349**	**237**	**209**

Source: BFI RSU
Notes:
Inward investment includes VFX-only titles.
Co-production includes both official and unofficial co-productions.
Data updated since publication of the 2021 Statistical Yearbook.

Table 3 shows that UK and non-UK originated independent films accounted for almost 96% of all films produced in the UK in 2021, a similar share to 2020. The number of UK studio-backed films (nine) produced in 2021 was the lowest of the 10-year period covered in the table. (These films account for the majority of UK production spend). The number of independent films produced in the year was also at a period low, although this figure is likely to be revised upwards as more data become available.

Table 3 Number of UK studio-backed and independent films produced in the UK, 2012-2021

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
UK studio-backed films*	15	16	16	25	18	20	16	19	10	9
Independent films**	362	357	359	345	335	360	334	330	227	200
Total	**377**	**373**	**375**	**370**	**353**	**380**	**350**	**349**	**237**	**209**
% UK studio-backed films	4.0	4.3	4.3	6.8	5.1	5.3	4.6	5.4	4.2	4.3

Source: BFI
* 'Studio-backed' means a UK film wholly or substantially financed and controlled by a US studio but featuring UK cast, crew, locations, facilities, post-production and often UK source material.
** Films produced without substantial 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 2021 Statistical Yearbook.

Film production by genre, 2019-2021

Table 4 shows a breakdown of UK film production by genre for the years 2019-2021. Dramas and documentaries accounted for the greatest proportion of films, at 18% each, but only 8% and 2% respectively of total UK spend. Other genres equalling or exceeding 10% of total productions were horror which accounted for 12% of films (2% of UK spend), comedy with 11% of films (5% of UK spend), and thriller with 10% of films (4% of UK spend). The biggest spending genre was action which accounted for 40% (£2.1 billion) of overall UK spend from 7% of films, and fantasy which accounted for 15% of UK spend (£803 million) from 2% of films.

Table 4 Genre of film production in the UK, 2019-2021 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	59	7.4	3,089.8	38.9	2,074.3	39.7
Fantasy	17	2.1	1,119.7	14.1	803.4	15.4
Drama	145	18.2	602.3	7.6	408.4	7.8
Adventure	13	1.6	448.4	5.7	318.5	6.1
Comedy	90	11.3	397.3	5.0	274.1	5.3
Thriller	81	10.2	440.4	5.5	203.2	3.9
Crime	32	4.0	191.5	2.4	157.3	3.0
Animation	13	1.6	276.4	3.5	151.6	2.9
Sci-fi	22	2.8	363.0	4.6	149.6	2.9
Biopic	20	2.5	197.7	2.5	124.7	2.4
Musical	10	1.3	181.7	2.3	122.2	2.3
War	12	1.5	123.1	1.6	109.7	2.1
Horror	96	12.1	105.2	1.3	86.7	1.7
Romance	37	4.7	141.5	1.8	85.2	1.6
Documentary	140	17.6	100.6	1.3	81.9	1.6
Other	8	1.0	157.6	2.0	67.9	1.3
Total	**795**	**100.0**	**7,936.3**	**100.0**	**5,218.8**	**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.

Table 5 shows the top 10 genres by share of UK spend for domestic UK films and inward investment/co-production titles (inward investment and co-production films have been combined for data disclosure reasons). The table shows a more even distribution of genres for domestic UK films compared with inward investment/co-production films. The top three genres by share of UK spend for domestic UK films – drama, comedy, and thriller – accounted for 54% of total UK production value for these films, while a single genre – action – accounted for 44.5% of the UK production value for inward investment/co-production films.

Table 5 Top 10 genres for domestic UK and inward investment/co-production films, 2019-2021 (ranked by % UK spend)

Domestic UK		
Genre	**% of total films**	**% of total UK spend**
Drama	18.1	24.1
Comedy	11.7	18.4
Thriller	10.3	11.9
Biopic	2.3	11.3
Documentary	21.4	9.2
Horror	15.4	7.4
Action	3.9	3.8
Romance	2.7	2.7
Crime	4.3	2.6
Fantasy	1.8	2.3
Total top 10	**91.8**	**93.7**
Total other genres	**8.2**	**6.3**
Total films = 514		

Inward investment & co-production		
Genre	**% of total films**	**% of total UK spend**
Action	13.9	44.5
Fantasy	2.8	17.1
Adventure	1.8	6.6
Drama	18.5	5.7
Comedy	10.7	3.5
Animation	4.3	3.3
Sci-fi	2.8	3.1
Crime	3.6	3.1
Thriller	10.0	2.8
Romance	8.2	1.5
Total top 10	**76.5**	**91.2**
Total other genres	**23.5**	**8.8**
Total films = 281		

Source: BFI
Notes:
The data have been limited to the top 10 ranking genres for disclosure reasons.
Percentages may not sum to sub-totals due to rounding.
See notes to Table 4.

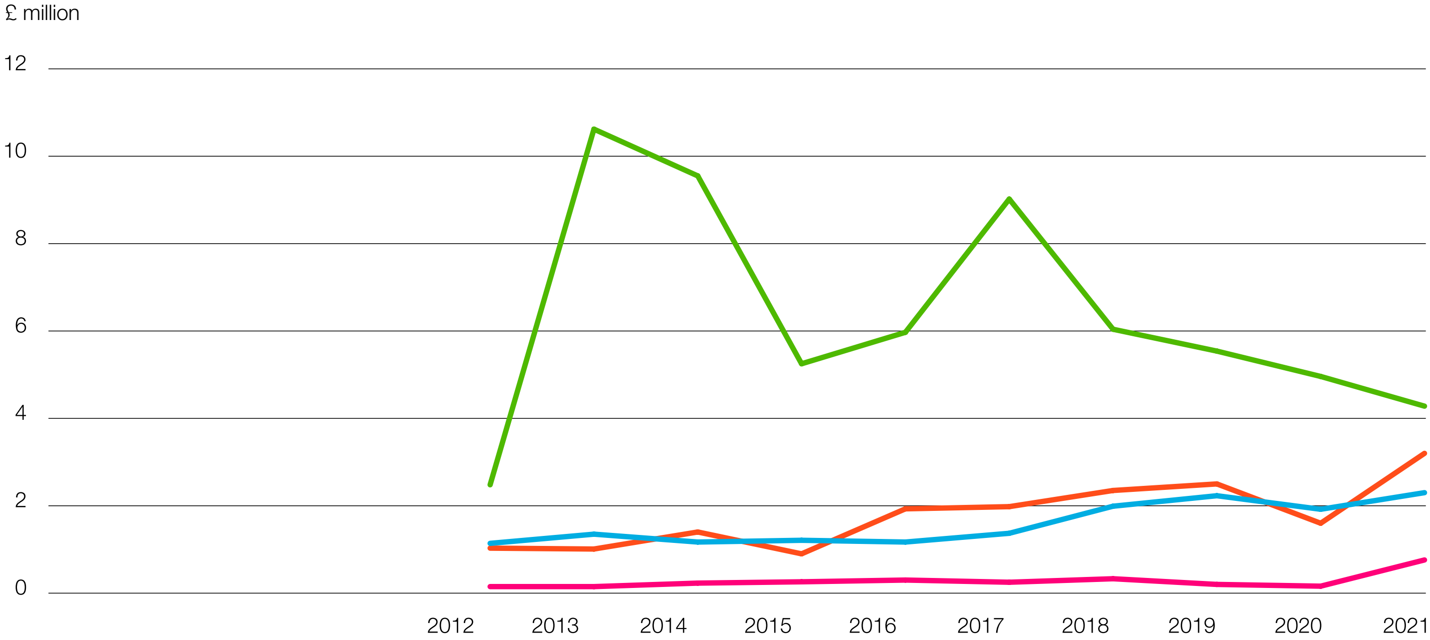
Image: *The Batman* © Warner Bros 2021. All Rights Reserved.

Budget trends, 2012-2021

Figure 4 shows the median budget for inward investment films, co-productions and domestic UK films between 2012 and 2021. It also includes data on median budgets for domestic UK films excluding those with budgets of less than £500,000.

While the median budget for inward investment features has shown the greatest fluctuation over the period, ranging from a low of £2.5 million to a high of £10.6 million, it has declined each year from 2017. In 2020 (£5.0 million) and 2021 (£4.3 million) the median was the third and second lowest of the period respectively. In contrast, the median budget for domestic UK productions overall has shown a significant increase over the period, rising by a factor of five, from £150,000 in 2012 to a period high of £760,000 in 2021. 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 £1.1 million in 2012 to a period high of £2.3 million in 2021. At £3.2 million, the median budget for co-productions was also at a period high in 2021 and was more than three times the median in 2012 (£1.0 million). It should be noted that the median budgets for all production categories in the most recent years are likely to be revised downwards as more data on production activity become available.

Figure 4 Median feature film budgets, 2012-2021



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Inward investment	2.48	10.62	9.55	5.25	5.97	9.02	6.04	5.54	4.96	4.28
Domestic UK - all productions	0.15	0.15	0.23	0.26	0.30	0.25	0.33	0.20	0.16	0.76
Domestic UK with budgets ≥ £500,000	1.14	1.35	1.17	1.21	1.17	1.37	1.99	2.23	1.92	2.30
Co-production	1.03	1.01	1.40	0.90	1.93	1.98	2.35	2.50	1.60	3.20

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 2021 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 2021 is outlined in Tables 6 to 8. Figures in these tables are based on our current data and are likely to be revised as more information on production activity becomes available.

Table 6 shows that 16 inward investment features with budgets of £30 million or over (29% of all inward features) accounted for 91% of the total budget for this category. There were 31 inward features with budgets of less than £5 million (56% of inward features), which accounted for 4% of the total budget for these films.

In 2021, 40% of domestic UK features (51) had budgets of less than £500,000, and only 16 productions (13% of domestic UK projects) had budgets of £5 million or over (Table 7). The domestic UK films in the highest budget band accounted for 53% of this category's aggregate budget, while those in the lowest budget band accounted for 4%.

Nine of the 28 co-productions that began shooting in the UK in 2021 had budgets of £5 million or over, accounting for 70% of the total budget in this category (Table 8). A similar number had budgets of less than £2 million and these accounted for 6% of the aggregate budget.

Table 6 Size distribution of budgets, inward investment films, 2021

Budget band	Number of films	Total budget in band (£ million)	% of total budget
≥£30 million	16	1,715.2	90.6
£10-£29.9 million £5-£9.9 million	8	99.2	5.2
£2-£4.9 million	18	60.9	3.2
<£2 million	13	17.4	0.9
Total	**55**	**1,892.7**	**100.0**

Source: BFI
Notes:
The numbers of inward features with budgets of £5-£9.9 million and £10-£29.9 million have been aggregated for disclosure reasons, due to the low numbers in the individual budget bands.
Percentages may not sum to 100 due to rounding.

Table 7 Size distribution of budgets, domestic UK films, 2021

Budget band	Number of films	Total budget in band (£ million)	% of total budget
≥£5 million	16	135.4	53.0
£2-£4.9 million	22	71.6	28.0
£0.5-1.9 million	37	38.9	15.2
<£0.5 million	51	9.8	3.8
Total	**126**	**255.7**	**100.0**

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

Table 8 Size distribution of budgets, co-productions, 2021

Budget band	Number of films	Total budget in band (£ million)	% of total budget
≥£5 million	9	92.9	69.9
£2-4.9 million	10	31.5	23.7
<£2.0 million	9	8.5	6.4
Total	**28**	**132.9**	**100.0**

Source: BFI

Big budget productions, 2012-2021

The importance to the UK film economy of a small number of big budget productions – usually inward investment films – is demonstrated in Table 9. In 2021, the 16 films with budgets of £30 million or over accounted for 73% of total UK production spend. All of these films were inward investment features.

Table 9 Big budget films' contribution to UK spend, 2012-2021

	Number of films with budgets ≥£30 million	Value of associated UK spend (£ million)	Total UK spend (£ million)	Big budget film % of UK spend
2012	10	634.3	1,007.5	63.0
2013	16	817.0	1,168.9	69.9
2014	20	1,157.1	1,573.7	73.5
2015	16	1,135.2	1,594.2	71.2
2016	25	1,460.6	1,880.5	77.7
2017	27	1,755.0	2,221.9	79.0
2018	19	1,520.5	2,091.6	72.7
2019	25	1,570.4	2,152.6	73.0
2020	13	1,214.9	1,511.8	80.4
2021	16	1,130.4	1,554.3	72.7

Source: BFI
Note: Data updated since publication of the 2021 Statistical Yearbook.

UK spend as percentage of total production budget, 2012-2021

Table 10 shows UK spend as a percentage of total production budget for inward investment films, domestic UK films and co-productions from 2012 to 2021. Domestic UK films consistently had the highest proportion of UK spend over the period while co-productions had the lowest. The greatest variation in UK spend as a percentage of total budget, however, was seen in inward investment productions. In 2021, the UK spend of domestic films was 86% of total budget, for inward investment films it was 67%, and for co-productions it was 43.5%.

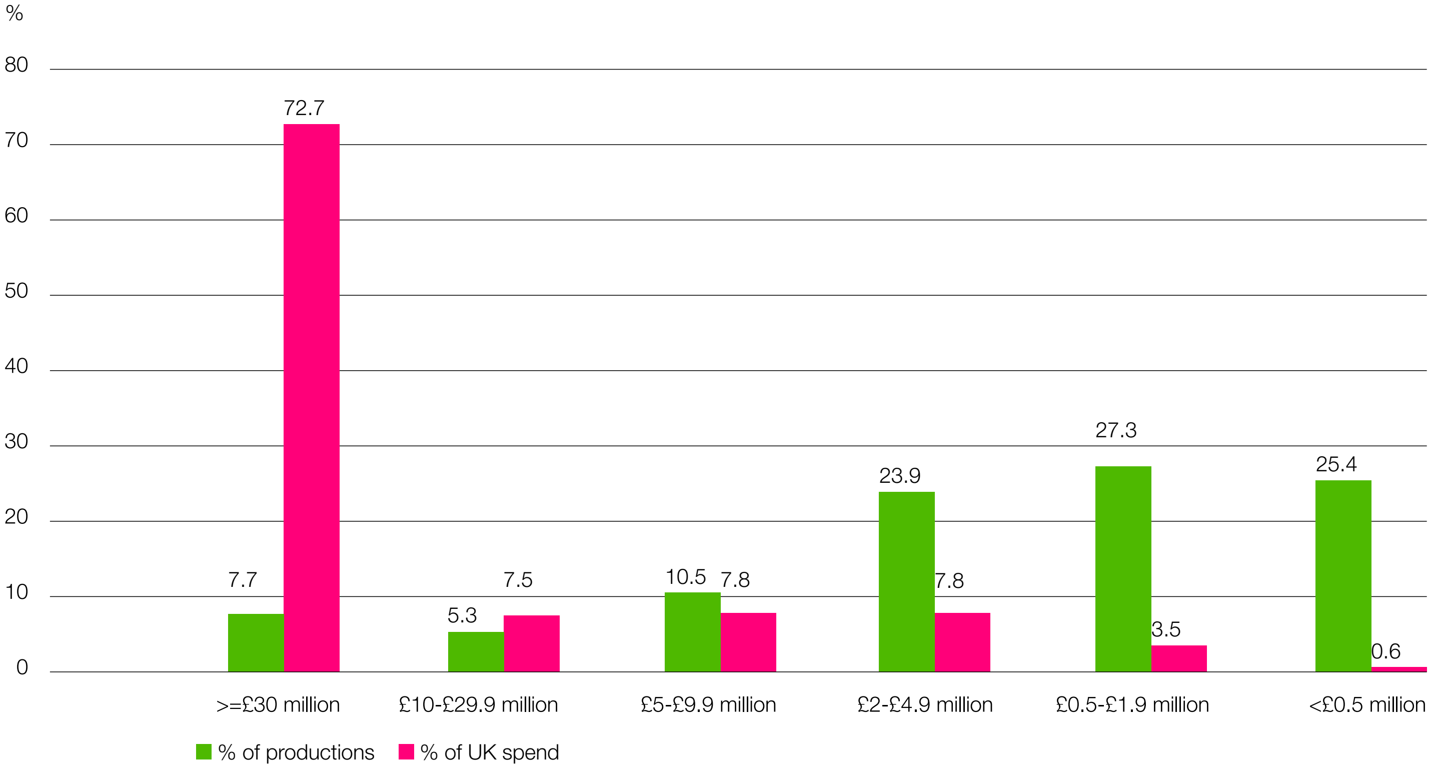
Table 10 UK spend as percentage of total production budget, 2012-2021

	Inward investment	Domestic UK	Co-production
2012	65.0	88.8	46.0
2013	68.9	85.6	45.0
2014	57.2	78.6	33.9
2015	60.4	89.6	40.0
2016	61.2	80.0	35.0
2017	52.5	87.0	37.8
2018	68.2	85.9	36.5
2019	63.8	87.5	45.7
2020	63.5	83.7	39.1
2021	67.4	86.4	43.5

Source: BFI
Note: Data updated since publication of the 2021 Statistical Yearbook.

Figure 5 underlines that a small proportion (8%) of titles with a UK spend of £30 million or over were responsible for the majority (73%) of UK production spend in 2021. Conversely, the 25% of films with a UK spend of less than £500,000 represented less than 1% of production investment in the UK.

Figure 5 Percentage of productions and UK spend by category of UK spend, 2021



Source: BFI

Domestic UK productions by territory of shoot

The majority of domestic UK productions beginning principal photography in 2021 (105 out of 126) were shot exclusively in the UK, while 21 were shot partly or wholly outside the country (Table 11). As a proportion of total budget, the non-UK spend of domestic productions in the year was 14%.

Table 11 Domestic UK productions by territory of shoot, 2021

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	105	173.0	3.5	2.0
UK and other	13	47.8	7.0	14.6
Other only	8	34.9	24.2	69.3
Total domestic UK films	**126**	**255.7**	**34.7**	**13.6**

Source: BFI

Table 12 shows the number of shoots by territory for domestic UK productions in 2021. 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 30 non-UK shoots in 22 different territories. Outside of the UK, the most popular production territory was the USA. The territories in the table range from Europe and North America to the Middle East, Africa and Asia, reflecting the wide range of stories being told by UK filmmakers.

Table 12 Domestic UK productions, shoots by territory, 2021

Territory of shoot	Number of shoots
UK	159
USA	3
Australia	2
France	2
Germany	2
Italy	2
Japan	2
Malta	2
Belgium	1
Caribbean	1
Finland	1
Iceland	1
India	1
Israel	1
Morocco	1
New Zealand	1
Norway	1
Portugal	1
Spain	1
Sweden	1
Thailand	1
Turkey	1
United Arab Emirates	1
Total	**189**

Source: BFI

Co-productions by territory of shoot

Table 13 shows that in contrast to domestic UK features, co-productions were usually shot partly or wholly abroad. Five out of 28 films, with a total budget of £25 million, were shot exclusively in the UK. Non-UK spend accounted for 56.5% of the total budget of co-productions in the year.

Table 13 Co-productions by territory of shoot, 2021

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	5	24.6	6.8	27.8
UK and other	13	57.1	34.5	60.4
Other only	10	51.2	33.7	65.9
Total co-productions	**28**	**132.9**	**75.0**	**56.5**

Source: BFI

The territory distribution of co-production shoots is shown in Table 14. As with domestic UK productions, the total number of shoots is greater than the total number of films. The majority of shoots were in the UK or elsewhere in Europe. The most popular non-European territory was the USA.

Table 14 Co-productions, shoots by territory, 2021

Territory of shoot	Number of shoots
UK	19
Republic of Ireland	5
Belgium	3
France	3
Italy	2
Sweden	2
USA	2
Bangladesh	1
Canada	1
China	1
Czech Republic	1
Germany	1
Greece	1
Hong Kong	1
Hungary	1
Netherlands	1
New Zealand	1
Philippines	1
Portugal	1
Romania	1
Serbia	1
Slovakia	1
South Africa	1
Spain	1
Syria	1
Total	**54**

Source: BFI

Production company activity levels

The BFI Research and Statistics Unit recorded 381 production companies associated with films shot in the UK or co-productions involving the UK in 2021 (Table 15). Of these, 355 companies (93%) 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 15 Film production company activity, 2021

Number of features per company	Number of companies
1	355
2	24
3	0
4	1
5	1
Total	**381**

Source: BFI RSU
Note: Includes all production categories.

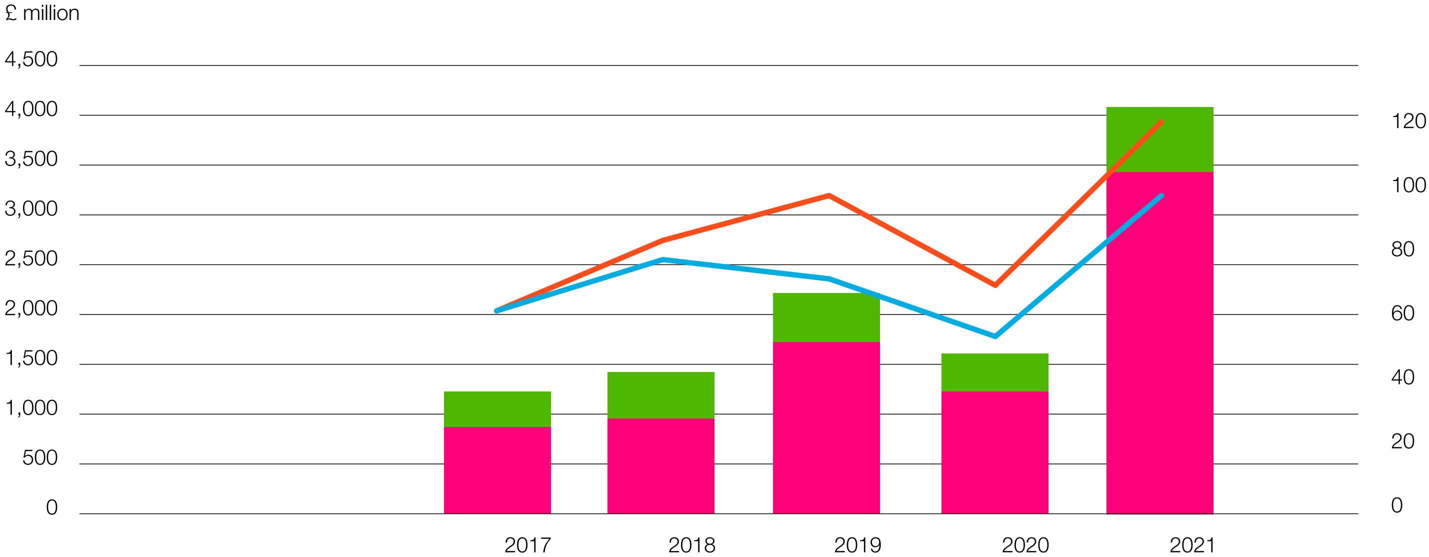
The value and volume of HETV production, 2017-2021

As Figure 6 shows, the UK production value associated with the filming of HETV projects in 2021 was £4.09 billion, up from £1.61 billion in 2020 and the highest total recorded since the introduction of the tax relief for HETV production in 2013. Co-productions and inward investment projects contributed £3.44 billion (84%) to the total UK spend, up from £854 million in 2020, while domestic UK productions contributed £648 million (16%) up from £377 million in 2020.

A record 211 HETV projects entered production in the UK in 2021; 117 of these productions were inward investment and co-production projects and 94 were domestic UK projects. The volume of both domestic UK productions and inward investment/co-production projects was higher than in any other year since 2013. As noted previously, HETV projects can be either single productions or series so numbers here can be misleading. As with film production, these figures are likely to be revised upwards as more detailed information on production activity becomes available.

Inward investment and co-production HETV projects shooting in the UK in 2021 included *Death in Paradise* (Series 11), *House of the Dragon* (Series 1) and *The Old Guard;* domestic UK HETV productions included *Call the Midwife* (Series 11), *The Gallows Pole* (Series 1) and *The Midwich Cuckoos* (Series 1).

Figure 6 UK spend and number of HETV productions produced in the UK, 2017-2021



	2017	2018	2019	2020	2021
UK spend domestic UK (£ million)	354.9	464.2	490.8	376.8	647.5
UK spend co-production & inward investment (£ million)	869.4	956.1	1,723.0	1,227.8	3,438.1
Total UK spend	**1,224.3**	**1,420.3**	**2,213.9**	**1,604.7**	**4,085.6**
Number of domestic UK productions	58	74	68	50	94
Number of co-production & inward investment productions	58	80	94	66	117
Total productions	**116**	**154**	**162**	**116**	**211**

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 for individual titles.
Tax relief for HETV programmes was introduced in 2013.
Data updated since publication of the 2021 Statistical Yearbook.

Streamer-backed HETV production, 2017-2021

As the previous chart has shown, the rise in value of HETV productions shooting in the UK between 2017 and 2021 is due largely to an increase in international commissions. A key driver of this growth is the surge in demand for original programming for first-run showing on subscription video-on-demand services. To gauge the impact of this investment on HETV production in the UK, Table 16 shows the number of HETV projects produced or co-produced by the major global streaming platforms and their associated UK spend. (In past editions of the Yearbook, this table focused solely on investment from Netflix and Amazon Prime Video but coverage has been extended to include all major streaming services.)

The UK production value associated with HETV projects backed by the major streaming services increased substantially from 2017, rising from £409 million to a record high of £2.79 billion in 2021. The number of these productions also increased over the period, rising from 29 in 2017 to 89 in 2021. As a share of overall UK spend for HETV projects, the production value of streamer-backed projects increased from 33% in 2017 to 68% in 2021. The value of projects co-financed by streaming services and UK broadcasters also reached a new high, rising from £187 million in 2017 to £320 million in 2021.

Streamer-backed HETV projects entering production in 2021 included Disney+'s *Willow* (Series 1), Netflix's *Bridgerton* (Series 2) and *Pistol* (Series 1) which was produced by FX for distribution on Hulu in the USA. Streamer-backed HETV projects co-financed by UK broadcasters included *Peaky Blinders* (Series 6; Netflix and the BBC), *Riches* (Series 1; Amazon Prime Video and ITV) and *The Undeclared War* (Peacock and Channel 4).

Table 16 Value and volume of streamer-backed HETV productions shot in the UK, 2017-2021

	2017	2018	2019	2020	2021
UK spend of all streamer-backed productions (£ million)	409.1	409.2	979.0	892.2	2,788.2
UK spend of those with UK broadcaster partners (£ million)	*186.7*	*107.6*	*142.3*	*76.8*	*320.2*
Total UK spend of HETV productions (£ million)	**1,224.3**	**1,420.3**	**2,213.9**	**1,604.7**	**4,085.6**
Streamer-backed productions as % of total	33.4	28.8	44.2	55.6	68.2
Total number of streamer-backed productions	**29**	**35**	**50**	**41**	**89**
Of which have UK broadcaster partners	*16*	*10*	*15*	*11*	*22*
Total number of HETV productions	**116**	**154**	**162**	**116**	**211**
Streamer-backed productions as % of total	25.0	22.7	30.9	35.3	42.2

Source: BFI
Notes:
Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.
A streamer-backed production with a UK broadcaster partner is a production financially backed at the production stage by both a streaming platform and a UK broadcaster.
Data updated since publication of the 2021 Statistical Yearbook, which only included Netflix and Amazon Prime Video productions. Now includes all major streaming platforms with HETV productions shooting in the UK such as Amazon Prime Video, Apple TV+, Disney+, Hulu, Netflix and Peacock.

Genre of HETV productions

Table 17 shows a breakdown by genre of HETV productions filmed in the UK in 2021. (It should be borne in mind that unlike the section on feature film production, comparisons here can be between single productions and series rather than solely stand-alone productions.) Drama was the most popular genre for HETV projects accounting for 57 productions (27% of the total) and a UK spend of £892 million (22% of the total). Comedy was the second most popular genre in terms of volume of production (22% of the total), while fantasy had the second largest share of UK spend (16% of the total). Crime was third both in share of productions (18.5%) and share of UK spend (12%).

Table 17 Genre of HETV projects, 2021 (ranked by UK spend)

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	57	27.0	1,138.2	22.4	892.1	21.8
Fantasy	11	5.2	987.2	19.4	665.1	16.3
Crime	39	18.5	513.2	10.1	489.5	12.0
Sci-fi	6	2.8	549.8	10.8	451.9	11.1
Thriller	19	9.0	452.7	8.9	393.3	9.6
Comedy	47	22.3	402.8	7.9	342.6	8.4
Action	6	2.8	388.9	7.6	313.1	7.7
Documentary	11	5.2	85.3	1.7	55.2	1.4
Other	15	7.1	568.4	11.2	482.8	11.8
Total	**211**	**100.0**	**5,086.6**	**100.0**	**4,085.6**	**100.0**

Source: BFI
Notes:
Includes single productions and series.
The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.
* Other includes adventure, biopic, children's, family, horror, musical, romance and war. Data are combined to avoid disclosing budget details of individual projects.
Figures/percentages may not sum to totals due to rounding.

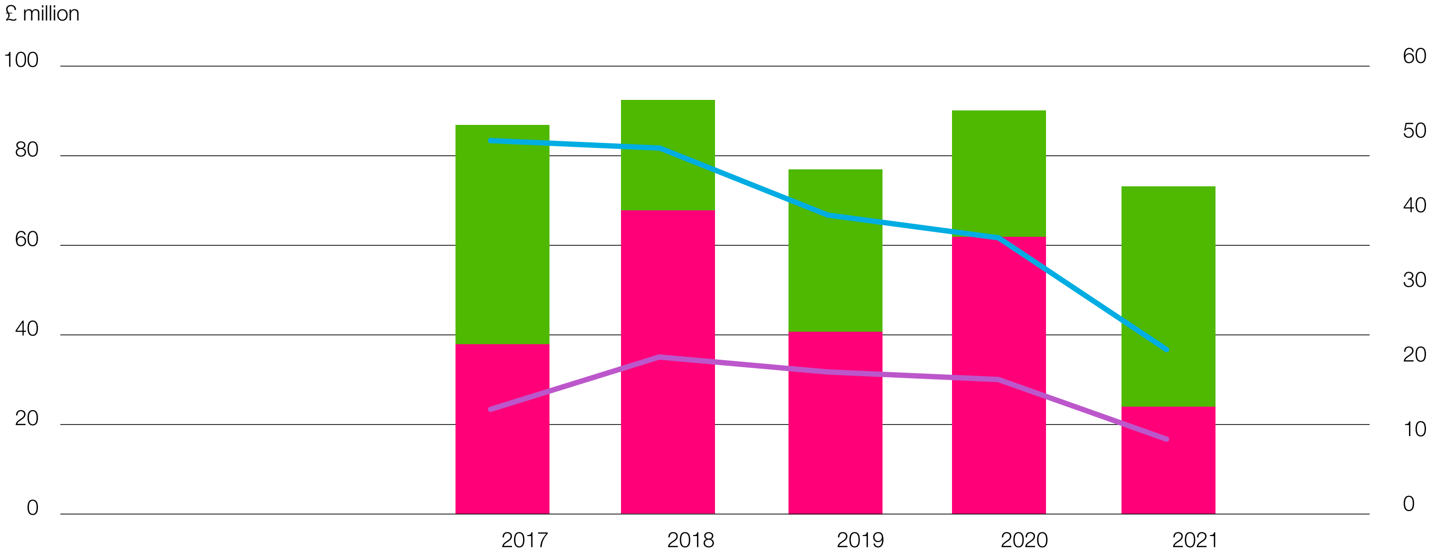
The value and volume of animated television production, 2017-2021

In contrast to our data collection on feature film and HETV projects for which we seek to track all production activity in the UK, with animation television programmes we currently only record production data on projects that have qualified as British for the purpose of benefitting from the animation tax relief. While projects can apply for certification as a qualifying production before or during the production process, many wait until completion before applying, so figures for the most recent years are likely be revised upwards. (For more on qualification as a British production, see the Certification chapter.)

According to our current data, qualifying animation programmes entering production in 2020 had a UK production spend of £90 million (Figure 7). This figure has been revised from the £61 million reported in the 2021 Yearbook, and surpasses the UK spend of £77 million reported for 2019. This increase from the last pre-pandemic annual total shows how successful the sector had been in minimising the impact of the COVID-19 pandemic, in part because some of its production techniques, such as 2D and 3D animation, better allowed for remote working. The UK spend of animation programmes currently recorded as going into production in 2021 is £73 million, £49 million of which is associated with domestic UK projects, the highest total for domestic UK animations since 2016 (£73 million).

Our data show that 53 UK qualifying animation projects began production in 2020 (revised from 34 projects as reported in the 2021 Yearbook), while there were 30 production starts in 2021. UK titles entering production in 2021 included *Millie and Lou* (Series 1), *Duplo* (pilot) and *Terry Pratchett's The Abominable Snow Baby*.

Figure 7 UK spend and number of UK qualifying animated television productions, 2017-2021



	2017	2018	2019	2020	2021
UK spend domestic UK (£ million)	48.9	24.6	36.2	28.2	49.1
UK spend co-production & inward investment (£ million)	38.0	67.8	40.8	61.8	23.9
Total UK spend	**86.9**	**92.4**	**77.1**	**90.0**	**73.0**
Number of domestic UK productions	49	48	39	36	21
Number of co-production & inward investment productions	13	20	18	17	9
Total productions	**62**	**68**	**57**	**53**	**30**

Source: BFI
Notes:
Productions are only tracked if they have been certified as British for the purpose of benefitting from the animation tax relief.
Productions are allocated to the year principal photography commenced.
Data for co-production and inward investment projects have been combined to avoid disclosing budget information for individual titles.
Tax relief for animation television production was introduced in 2013.
Data updated since publication of the 2021 Statistical Yearbook; figures for recent years are likely to be revised as additional productions apply for certification.

The value and volume of children's television production, 2017-2021

We currently only record production data on children's television projects that have qualified as British for the purpose of benefitting from the children's television tax relief. While projects can apply for certification as a qualifying production before or during the production process, many wait until completion before applying, so figures for the most recent years are likely be revised upwards.

According to our current data, qualifying children's television programmes entering production in 2020 had a UK spend of £122 million (Table 18), the highest UK production value since the introduction of the tax relief for children's television production in 2015. This figure has been revised from the £102 million reported in the 2021 Yearbook. The UK spend associated with children's television programmes currently recorded as going into production in 2021 is £69 million.

Our data show that 89 UK qualifying children's TV projects began production in 2020 (revised from 45 projects as reported in the 2021 Yearbook), while there were 47 production starts in 2021. UK titles going into production in 2021 included *Almost Never* (Series 3), *Dodger* (Series 1) and *Heartstopper* (Series 1).

Table 18 UK spend of UK qualifying children's television productions, 2017-2021 (£ million)

	2017	2018	2019	2020	2021
UK spend domestic UK (£ million)	49.8	93.7	69.8	61.9	55.7
UK spend co-production and inward investment (£ million)	23.4	23.9	15.3	60.3	13.7
Total UK spend	**73.1**	**117.6**	**85.1**	**122.2**	**69.4**
Number of UK domestic productions	70	96	75	82	c
Number of co-production and inward investment productions	7	7	5	7	c
Total productions	**77**	**103**	**80**	**89**	**47**

Source: BFI
Notes:
Productions are only tracked if they have been certified as British for the purpose of benefitting from the children's television tax relief.
Productions are allocated to the year principal photography commenced; a production can be a single programme or a television series.
Data for co-production and inward investment projects have been combined to avoid disclosing budget information for individual titles.
Tax relief for children's television production was introduced in 2015.
Figures may not sum to totals due to rounding.
'c' indicates the data have been suppressed due to low numbers to avoid disclosing details of individual projects.
Data updated since publication of the 2021 Statistical Yearbook; figures for recent years are likely to be revised as additional productions apply for certification.

The value and volume of video games development, 2017-2021

We currently only record production data on video games that have qualified as British for the purpose of benefitting from the video games tax relief. While projects can apply for certification as a UK qualifying game before or during the development process, many projects wait until completion before applying. As there can be many years between development commencing and a project applying for certification, figures for recent years are likely to be revised upwards.

According to our current data, qualifying video games entering development in 2020 had a UK spend of £376 million (Table 19). This figure has been revised from the £91 million reported in the 2021 Yearbook. The UK spend of video game projects currently recorded as starting development in 2021 is £13 million.

Or data show that 132 UK qualifying video game projects began development in 2020 (revised from 23 projects as reported in the 2021 Yearbook), while there were 17 development starts in 2021. UK qualifying video games released to consumers in 2021 included *The Dark Pictures Anthology: House of Ashes, Goliath: Playing with Reality* and *Jurassic World Evolution 2.*

Table 19 UK spend and number of UK qualifying video games, 2017-2021

	2017	2018	2019	2020	2021
UK spend (£ million)	540.3	474.4	480.6	376.0	12.6
Number of projects	350	314	278	132	17

Source: BFI
Notes:
Projects are only tracked if they have been certified as British for the purpose of benefitting from the video games tax relief.
Projects are allocated to the year development commenced.
The tax relief for video games projects was introduced in 2014; there are no co-production treaties for video games.
Data updated since publication of the 2021 Statistical Yearbook; figures for recent years are likely to be revised as additional video games projects apply for certification.

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