Statistical Yearbook 2018

Welcome to the 2018 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 2017. 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 Josh Berger.

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FILM AT THE CINEMA

FACTS IN FOCUS

UK BOX OFFICE RECEIPTS IN 2017

£1.3 billion

up **4.2%** on 2016

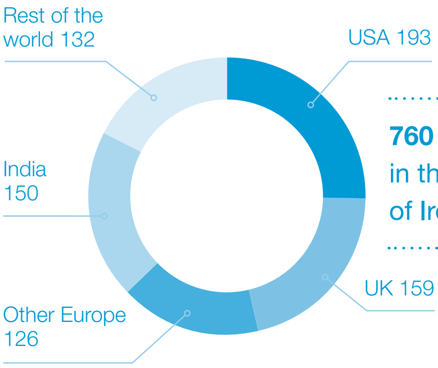
UK CINEMA ADMISSIONS IN 2017

170.6 million

Attendances up 1.4% on 2016

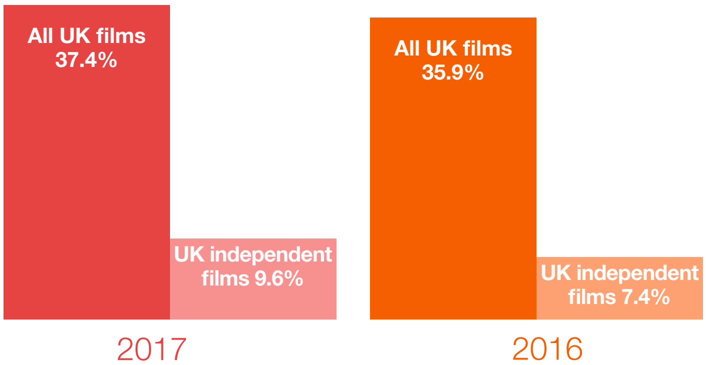
The **fifth highest** of the last decade

ORIGIN OF FILM RELEASES



760 feature films released in the UK and Republic of Ireland

BOX OFFICE SHARE OF UK FILMS



TOP GROSSING FILM

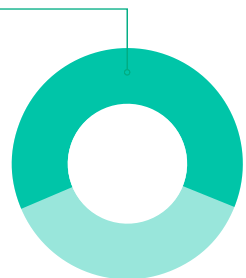
Star Wars: The Last Jedi
£83m

TOP GROSSING INDEPENDENT UK FILM

Paddington 2
£43m

SPECIALISED FILMS

Specialised films made up **60%** of all film releases; they grossed **£39 million**, a **3% share of total box office**



RELEASES BY GENRE

23%
of box office

11%
of releases

Action was the **highest earning genre**, taking **23%** of the box office from **11%** of releases. **The top earning action title** was Guardians of the Galaxy: Vol. 2

RELEASES BY CLASSIFICATION

£605 million

'12A' films had the **largest** box office gross

39%

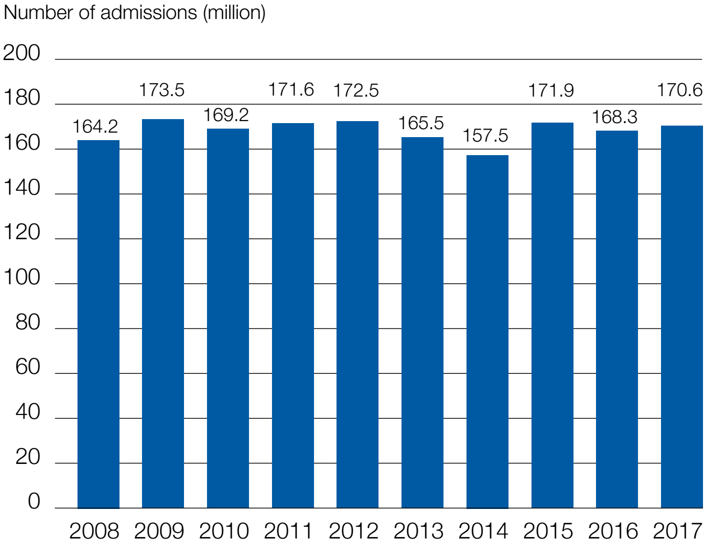
Films classified as '15' accounted for **the largest share** of releases

FILM AT THE CINEMA

ADMISSIONS

A total of 170.6 million cinema tickets were sold in the UK in 2017, a slight increase (1.4%) on the number of admissions in 2016 (Figure 1). The number of cinema visits in 2017 was the fifth highest of the last decade but since the early 2000s the trend has been fairly flat, with most years' admissions being in the range 165-170 million.

Figure 1 Annual UK cinema admissions, 2008-2017



Source: CAA, comScore

The UK remains the second largest market for admissions in the European Union (EU) after France (209.4 million) where attendances were down by 1.7% compared with 2016 (Table 1). Of the other five major EU territories, admissions were up slightly in Germany (122.3 million; +1%) but down in Spain (100.2 million; -1.6%) and Italy (99.2 million; -12.9%). Italy's fall in admissions was the largest drop in ticket sales across all 28 EU member states.

The European Audiovisual Observatory reports that there was a moderate decline in attendances in the EU as a whole in 2017, with ticket sales totalling 985 million, down from a record high of 992 million in 2016. However, this was still the second highest level of admissions since the data was first published in 2004. In non-EU countries in Europe, Russia topped the 200 million mark for the first time, jumping by 10% to 212.2 million ticket sales, making it the largest market for admissions in Europe. Turkey remained the seventh largest European market for attendances with admissions of 71.2 million, up 22.1% on 2016.

According to the Motion Picture Association of America, outside of Europe ticket sales in North America (USA and Canada) were at their lowest since 1995 (1.24 billion; down 6% on 2016), while sales in China were at an all-time high (1.62 billion; up 18.1% on 2016). Attendances in India, which remains the global leader in terms of admissions, saw a slight increase on the previous year (1.98 billion; up 0.7% on 2016).

Table 1 Admissions in selected global territories, 2016 and 2017 (ranked by 2017 admissions)

Territory	Admissions 2016 (million)	Admissions 2017 (million)	+/- 2016 (%)
India	1,966.5	1,981.0	0.7
China	1,372.0	1,620.0	18.1
USA and Canada	1,320.0	1,240.0	-6.0
Russia	192.9	212.2	10.0
France	213.1	209.4	-1.7
UK	168.3	170.6	1.4
Other Western Europe	127.8	126.1	-1.3
Germany	121.1	122.3	1.0
Other Central and Eastern Europe	95.3	100.6	5.6
Spain	101.8	100.2	-1.6
Italy	113.8	99.2	-12.9
Turkey	58.3	71.2	22.1

Source: European Audiovisual Observatory, MPAA, IHS

Notes:

Other Western Europe comprises Austria, Belgium, Denmark, Finland, Greece, Republic of Ireland, the Netherlands, Norway, Portugal, Sweden and Switzerland.

Other Central and Eastern Europe comprises Czechia, Hungary, Israel, Poland and Romania.

The overall annual rise in admissions in 2017 compared with 2016 was not reflected in increased monthly attendances throughout the year (Table 2). Seven months out of 12 recorded higher monthly admissions than the equivalent period in 2016. The first four months of the year saw an unusually prolonged run of increased admissions with March and April showing the largest month-on-month increases (up 21% and 19% respectively on 2016). Eight of the top 20 films of the year opened during these months including *La La Land, Beauty and the Beast* and *Guardians of the Galaxy: Vol 2.* Admissions were down month on month for the next six months with the exception of July which saw the release of three of the year's top 20 films: *Despicable Me 3, Spider-Man: Homecoming* and *Dunkirk*. Although it recorded only the second highest month-on-month rise compared with 2016 (7%), July saw the highest admissions for the entire year at 17.8 million. The only other two months to improve on attendances compared with 2016 were November and December which saw the release of four of the year's top 20 titles including the top earning UK independent film of 2017, *Paddington 2,* and the top grossing film of the year, *Star Wars: The Last Jedi.*

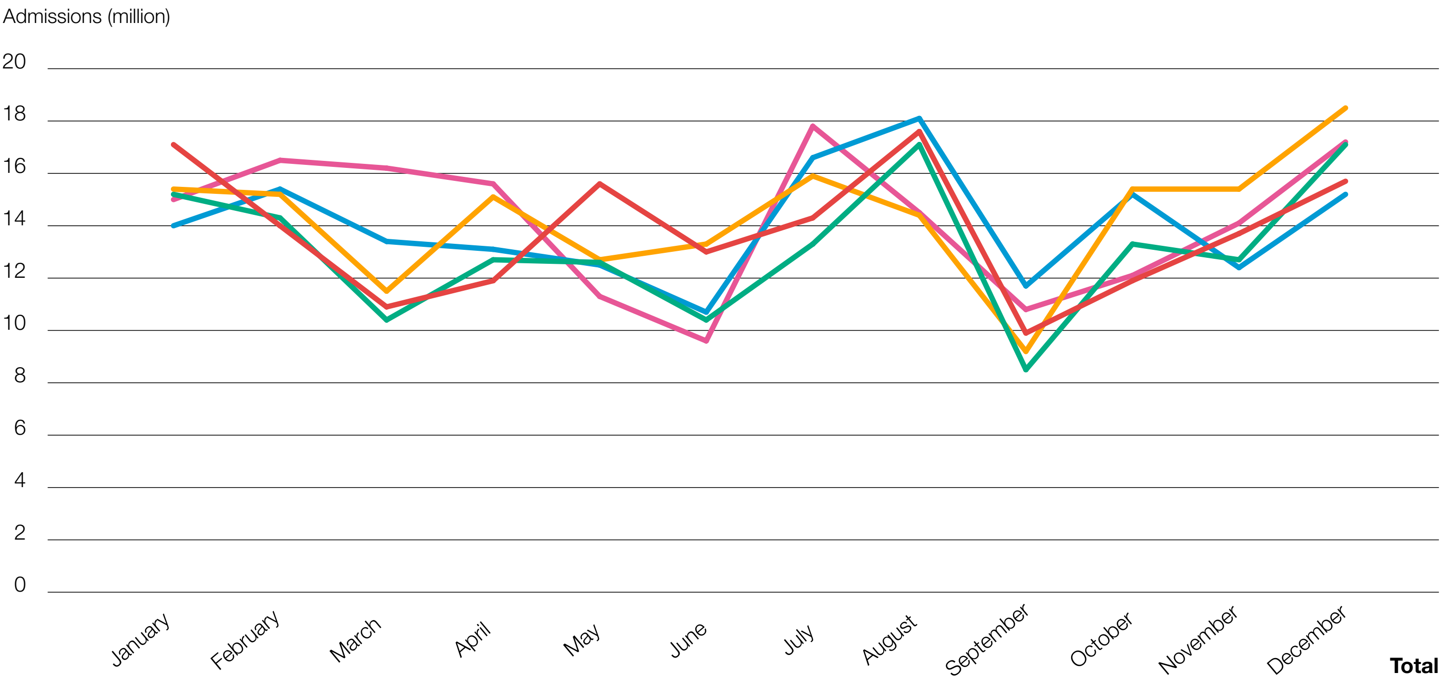
Table 2 Monthly UK cinema admissions, 2016 and 2017

Month	2016 (million)	2017 (million)	% +/- on 2016
January	14.0	15.0	6.9
February	15.4	16.5	7.4
March	13.4	16.2	20.6
April	13.1	15.6	19.1
May	12.5	11.3	-9.3
June	10.7	9.6	-10.5
July	16.6	17.8	7.3
August	18.1	14.5	-20.0
September	11.7	10.8	-7.5
October	15.2	12.1	-20.3
November	12.4	14.1	13.6
December	15.2	17.2	12.8
Total	**168.3**	**170.6**	**1.4**

Source: CAA, comScore

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

Figure 2 Monthly UK cinema admissions, 2013-2017



	January	February	March	April	May	June	July	August	September	October	November	December	Total
2013	17.1	14.0	10.9	11.9	15.6	13.0	14.3	17.6	9.9	11.9	13.7	15.7	**165.5**
2014	15.2	14.3	10.4	12.7	12.6	10.4	13.3	17.1	8.5	13.3	12.7	17.1	**157.5**
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**

Source: CAA

Looking at monthly admissions since 2013, Figure 2 shows there is a broadly similar trend year on year. (Admissions tend to be higher during the school and festival holiday periods when people have more time to go to the cinema.) The chart does, however, highlight the unusual run of high earning months at the start of 2017.

Table 3 shows how the 2017 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 (23.4%) followed by the Midlands and South and South East (both with 12.1%). Together these three regions accounted for almost half (48%) of all cinema admissions in 2017. In terms of average admissions per head of population, cinema going is highest in London, Central Scotland and Northern Ireland and lowest in the North, South West and Border regions.

Overall, the pattern of national and regional admissions has remained largely unchanged over the last decade, however, whilst London accounts for the highest number of attendances each year its share of the total has recently begun to fall slightly; it was 25.5% in 2013.

Table 3 Cinema admissions by ISBA TV region, 2017

Region	Admissions (million)	%	Population (million)**	Admissions per head
London	40.0	23.4	13.4	3.0
Midlands	20.6	12.1	8.8	2.3
South and South East	20.6	12.1	7.4	2.8
North West	16.2	9.5	7.0	2.3
North	14.1	8.3	6.4	2.2
East	14.0	8.2	4.9	2.9
Wales and West*	13.0	7.6	5.4	2.4
Central Scotland	11.2	6.5	3.7	3.0
North East	6.7	3.9	2.8	2.4
Northern Ireland	5.8	3.4	1.9	3.1
South West	4.0	2.3	1.8	2.2
Northern Scotland	3.5	2.0	1.3	2.6
Border	1.1	0.6	0.6	1.7
Total	**170.6**	**100.0**	**65.4**	**2.6**

Source: CAA, comScore

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

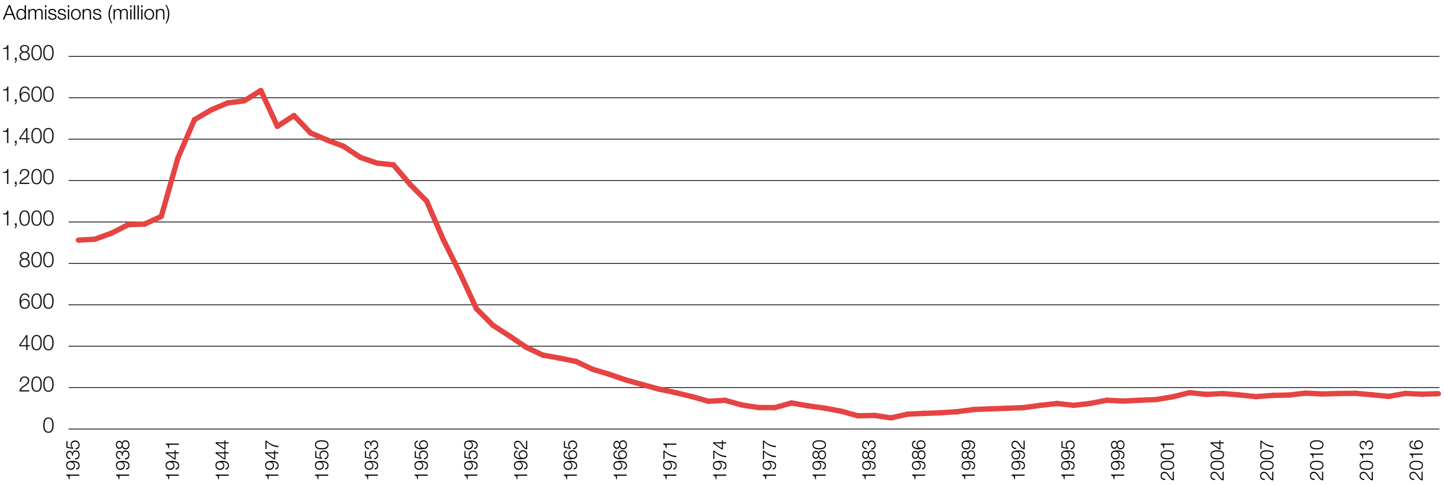
*Wales and West are reported by CAA as two separate regions; for consistency with previous editions of the Yearbook, the data here is combined.

** 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 returning to levels last seen in the early 1970s.

Admissions in 2017 were the fifth highest of the last decade but since the early 2000s the trend has been fairly flat, with most years' admissions being in the range 165-170 million.

Figure 3 Annual UK admissions, 1935-2017



Year	Admissions (million)
1935	912.3
1936	917.0
1937	946.0
1938	987.0
1939	990.0
1940	1,027.0
1941	1,309.0
1942	1,494.0
1943	1,541.0
1944	1,575.0
1945	1,585.0
1946	1,635.0
1947	1,462.0
1948	1,514.0
1949	1,430.0
1950	1,395.8
1951	1,365.0
1952	1,312.1
1953	1,284.5
1954	1,275.8
1955	1,181.8
1956	1,100.8
1957	915.2
1958	754.7
1959	581.0
1960	500.8
1961	449.1
1962	395.0

Year	Admissions (million)
1963	357.2
1964	342.8
1965	326.6
1966	288.8
1967	264.8
1968	237.3
1969	214.9
1970	193.0
1971	176.0
1972	156.6
1973	134.2
1974	138.5
1975	116.3
1976	103.9
1977	103.5
1978	126.1
1979	111.9
1980	101.0
1981	86.0
1982	64.0
1983	65.7
1984	54.0
1985	72.0
1986	75.5
1987	78.5
1988	84.0
1989	94.5
1990	97.4

Year	Admissions (million)
1991	100.3
1992	103.6
1993	114.4
1994	123.5
1995	114.6
1996	123.5
1997	138.9
1998	135.2
1999	139.1
2000	142.5
2001	155.9
2002	175.9
2003	167.3
2004	171.3
2005	164.7
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6
2012	172.5
2013	165.5
2014	157.5
2015	171.9
2016	168.3
2017	170.6

Source: BFI, CAA, comScore

UK BOX OFFICE EARNINGS

According to comScore, the total UK box office gross for 2017 was £1.3 billion, a new record high. This total covers all box office earnings during the calendar year 2017 for cinema screenings in the UK for which box office takings were tracked by comScore. Since 2008 there has been an upward trend in UK box office earnings; the overall gross for 2017 was 51% higher than in 2008 (Table 4). This was underpinned by average ticket prices also reaching an all-time high. (Trends in ticket prices are reported more fully in the Distribution and exhibition chapter.)

Table 4 UK box office trends, 2008-2017

Year	Box office gross (£ million)	Change on previous year %	Change since 2008 %
2008	850	-	-
2009	944	11.1	11.1
2010	988	4.7	16.2
2011	1,040	5.3	22.4
2012	1,099	5.7	29.3
2013	1,083	-1.5	27.4
2014	1,058	-2.3	24.5
2015	1,242	17.4	46.1
2016	1,228	-1.2	44.4
2017	1,280	4.2	50.5

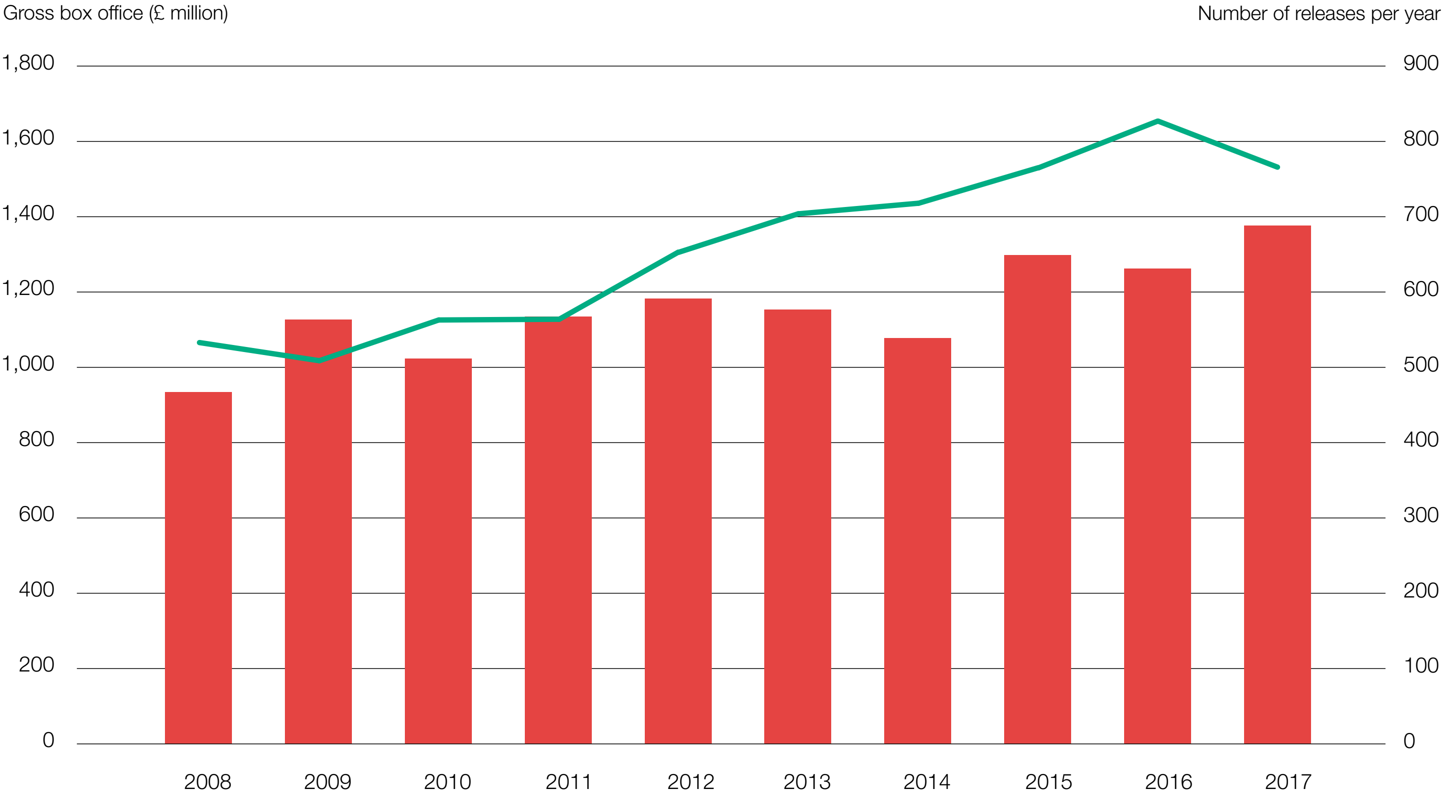
Source: comScore

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

In 2017, 760 films (an average of almost 15 per week) were released for a week or more in the UK and Republic of Ireland, 61 fewer than in 2016 but an almost identical total to 2015. These films generated £1.4 billion in box office revenues (another record-breaking figure and an increase of 6% on the previous high set in 2015). The figure of £1.4 billion differs from the £1.3 billion in the previous section because it includes revenues generated in 2018 by films released in 2017 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 2017 and includes revenues generated up to 18 February 2018.

Figure 4 shows the annual totals for the number of releases and box office gross between 2008 and 2017. Although there is an upward trend in both the number of releases and box office revenues over the period, there is little correlation between the number of releases and box office returns. From 2013 to 2016, as the number of releases increased year on year, there was a downward trend in average box office takings. However, in 2017, although there were fewer releases, the average revenue per release saw an increase in value back to the level seen in 2012 and earlier.

Figure 4 Releases and revenues at the UK and Republic of Ireland box office, 2008-2017



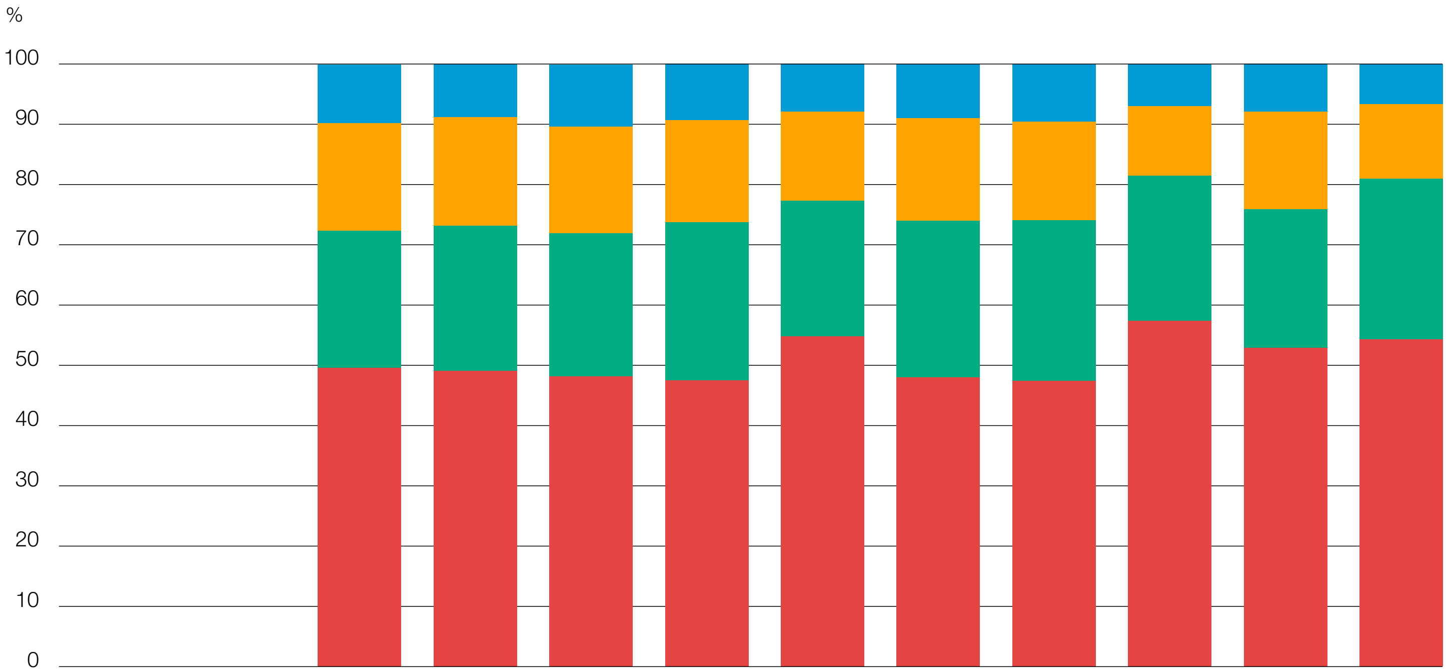
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Gross box office (£ million)	934.5	1,126.7	1,023.6	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9
Number of releases per year	527	503	557	558	647	698	712	759	821	760
Average revenue per release (£ million)	1.8	2.2	1.8	2.0	1.8	1.7	1.5	1.7	1.5	1.8

Source: comScore, BFI RSU analysis

Note: Box office up to and including 18 February 2018.

As Figure 5 shows, the market share of the top 50 highest grossing films has been relatively stable since 2008, accounting on average for 75% of box office revenues. However, in both 2015 and 2017, the box office share of the top 50 films was 81%, mainly due to the success of some very high earning films such as *Star Wars: The Force Awakens* (£123 million) and *SPECTRE* (£95 million) in 2015 and *Star Wars: The Last Jedi* (£82 million) and *Beauty and the Beast* (£72 million) in 2017. At just over 93%, the box office share of the top 100 films in 2017 was the highest of the period while the share for films outside the top 100 was the lowest at less than 7%.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2008-2017



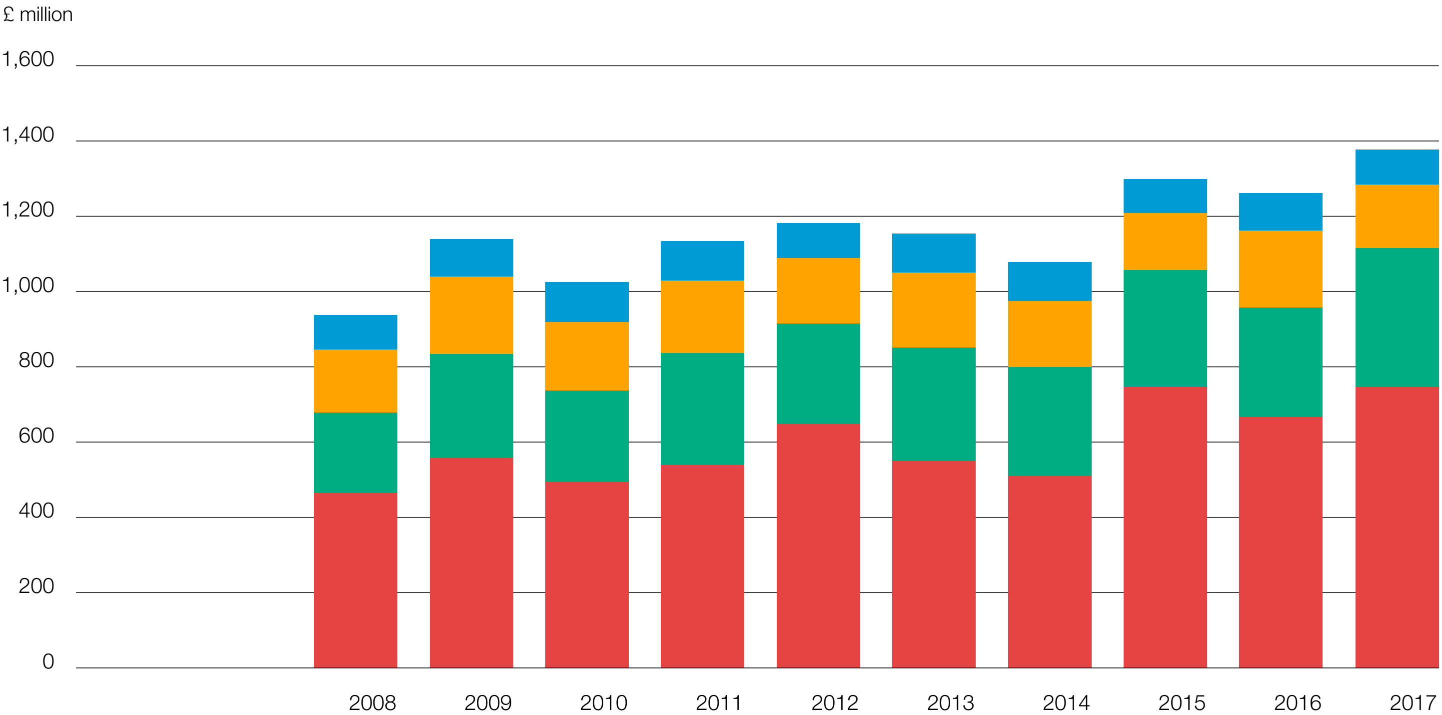
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
% share of top 20	49.6	49.1	48.2	47.5	54.8	48.0	47.4	57.4	52.9	54.3
% share of 21-50	22.7	24.0	23.7	26.2	22.5	26.0	26.7	24.0	23.0	26.7
% share of 51-100	17.9	18.1	17.7	17.0	14.8	17.0	16.3	11.6	16.2	12.3
% share of rest	9.7	8.8	10.3	9.3	7.9	9.0	9.6	7.0	7.9	6.7

Source: comScore, BFI RSU analysis

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

Figure 6 shows that the record box office generated in 2017 was up 47% when compared with 2008. The takings of the top 20 film releases, the highest of the period at £747 million, were up 11% compared with 2016 and an increase of 61% on 2008. The films ranked 21-50 earned £367 million in 2017, the highest of the period and up 21% on 2008, while those ranked 51-100 earned £170 million, a 20% fall compared with 2016 and a similar total to earnings in 2008.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Gross box office of top 20	465.0	559.3	494.6	539.3	647.9	551.1	510.7	745.6	667.7	747.1
Gross box office of 21-50	213.1	273.7	242.9	296.8	266.5	299.3	288.1	311.6	289.6	367.2
Gross box office of 51-100	168.0	206.2	181.7	192.8	174.9	199.3	175.5	150.3	204.5	170.0
Gross box office share of rest	91.4	100.8	106.1	105.6	92.9	104.0	103.5	90.9	100.2	92.2

Source: comScore, BFI RSU analysis

While there has been a general upward trend in the box office totals of the top 100 films since 2008, there has been little change in the box office generated by the remaining films released each year. As Figures 5 and 6 show, while there are variations in the actual takings and box office share for all films outside the top 100, the majority of releases are competing for a smaller share of the box office.

Table 5 shows that since 2008, while there has been an upward trend in the overall number of films being released there has been a slight, but variable, downward trend in the median box office earnings for films outside the top 100. The combined box office of all films outside the top 100 in 2017 was £92 million. However, this was shared by 660 titles (a median box office of £23,803) while the £101 million taken by films outside the top 100 in 2009 was split across 403 titles (the lowest number of titles in the period; a median box office of £27,902). This highlights the increasing difficulties faced by independent distributors who are 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, 2008-2017

	Number of releases	Gross box office (£ million)	Median box office (£)
2008	427	91.4	38,273
2009	403	100.8	27,902
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

Source: comScore, BFI RSU analysis

WIDEST POINT OF RELEASE

Table 6 outlines the number of films released in the UK in 2017 by the number of sites at the widest point of release (WPR). The majority of films were shown at a small number of sites. A total of 197 releases were shown at 100 sites or over (26% of all films released), while 260 films were shown at fewer than 10 sites (34% of films released). The maximum box office of these films (£4.5 million) is skewed by the high box office takings of one title, the Secret Cinema re-release of *Moulin Rouge!* which was shown at one site with tickets costing from £49 to £150.

Table 6 Number of releases and median box office gross by number of sites at widest point of release, 2017

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥500	63	8.3	12,928,823	1,705,537	82,620,648
400-499	33	4.3	2,882,091	527,455	11,862,616
300-399	24	3.2	968,067	435,638	9,019,739
200-299	24	3.2	649,063	32,215	3,821,767
100-199	53	7.0	328,725	13,613	1,780,252
50-99	79	10.4	121,286	4,977	1,422,385
10-49	224	29.5	32,532	719	560,858
<10	260	34.2	5,719	26	4,484,897
Total	**760**	**100.0**	**36,653**	**26**	**82,620,648**

Source: comScore, BFI RSU analysis

COUNTRY OF ORIGIN OF FILM RELEASES

Twenty-five per cent of all films released in the UK in 2017 were of USA origin (excluding UK co-productions) and these films accounted for 58% of total box office earnings (Table 7). UK films, including co-productions, represented 21% of releases (the same as in 2016) and shared 37% of the box office; the share for UK independent films was 10% (up from 7% in 2016).

Films originating outside the UK and USA accounted for 54% of releases (up from 52% in 2016) but just 5% of earnings (the same as in 2016). Films from non-UK European countries accounted for 1.5% of the box office (from 17% of releases) down from 3.2% in 2016, which was compensated by a rise in the share for films from the rest of the world which increased from 0.8% in 2016 to 2.3% in 2017 (also from 17% of all releases). Films from India accounted for 1.2% of the total box office (from 20% of releases) the same as in 2016.

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2017

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	193	25.4	794.0	57.7
UK (studio-backed*)	20	2.6	382.3	27.8
UK (independent)	139	18.3	132.6	9.6
All UK	159	20.9	514.9	37.4
Other Europe	126	16.6	20.2	1.5
India	150	19.7	15.7	1.1
Rest of the world	132	17.3	32.1	2.3
Total	**760**	**100.0**	**1,376.9**	**100.0**

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 18 February 2018.

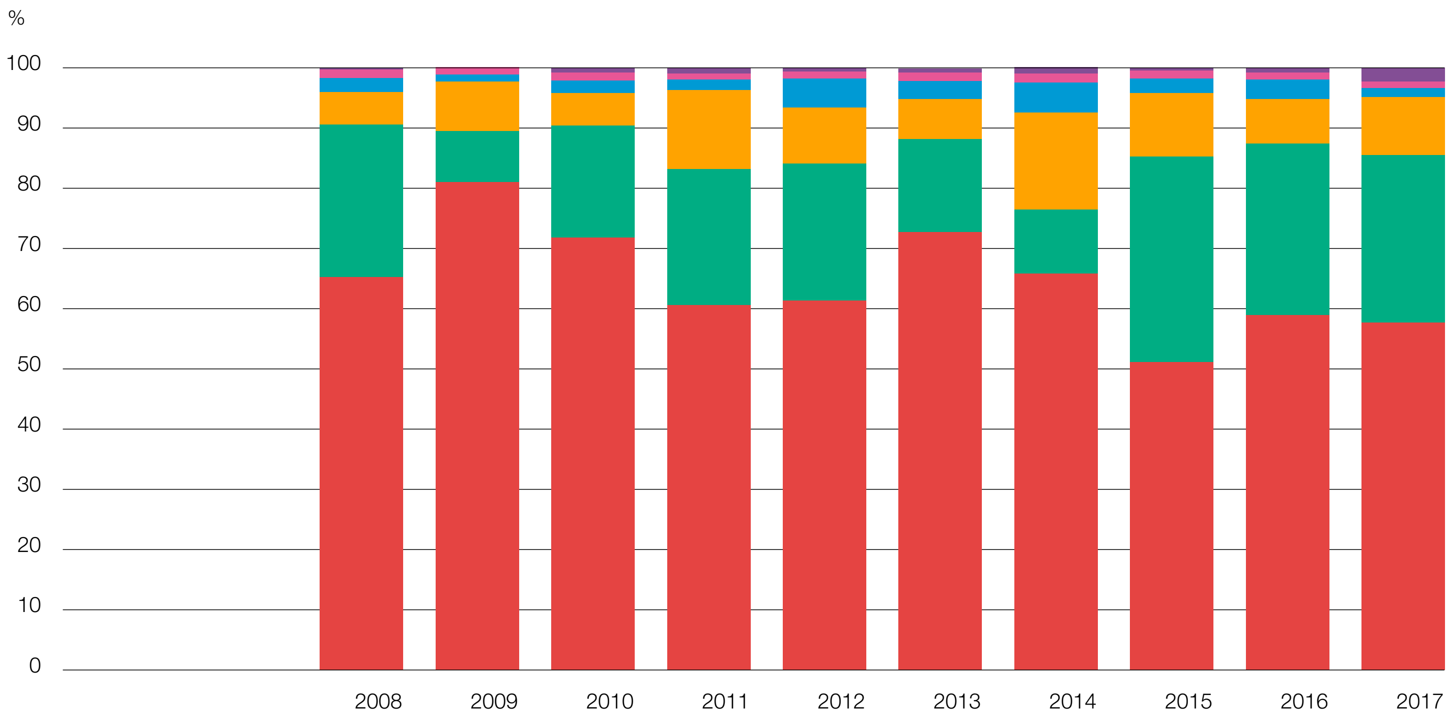
Percentages may not sum to totals/subtotals due to rounding.

*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.

The changes in market share for films by country of origin between 2008 and 2017 are shown in Figure 7. The average combined share of USA-only and UK studio-backed films was around 90% up to 2010, but fell to around 84% for the remainder of the period, with the exception of 2014 when the share was 76%. The main reason for the lower figure in that year was the increased share achieved by UK independent releases (16%; the highest level since our records began) such as *Paddington* and *The Inbetweeners 2*, which were among the year's top five films.

The high levels of market share achieved by UK studio-backed films between 2015 and 2017 reflects the UK's success in attracting popular international franchises such as Star Wars and the Disney live-action adaptations to base their productions in the country.

Figure 7 Market share by country of origin, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
USA	65.2	81.0	71.8	60.6	61.3	72.7	65.8	51.1	58.9	57.7
UK studio-backed*	25.4	8.5	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8
UK independent	5.7	8.2	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6
Other Europe	2.3	1.2	2.1	1.7	4.8	3.0	4.9	2.4	3.2	1.5
India	1.4	1.0	1.3	1.0	1.2	1.4	1.5	1.3	1.2	1.1
Rest of the world	0.3	0.2	0.8	1.0	0.6	0.7	1.1	0.5	0.8	2.3

Source: BFI, RSU

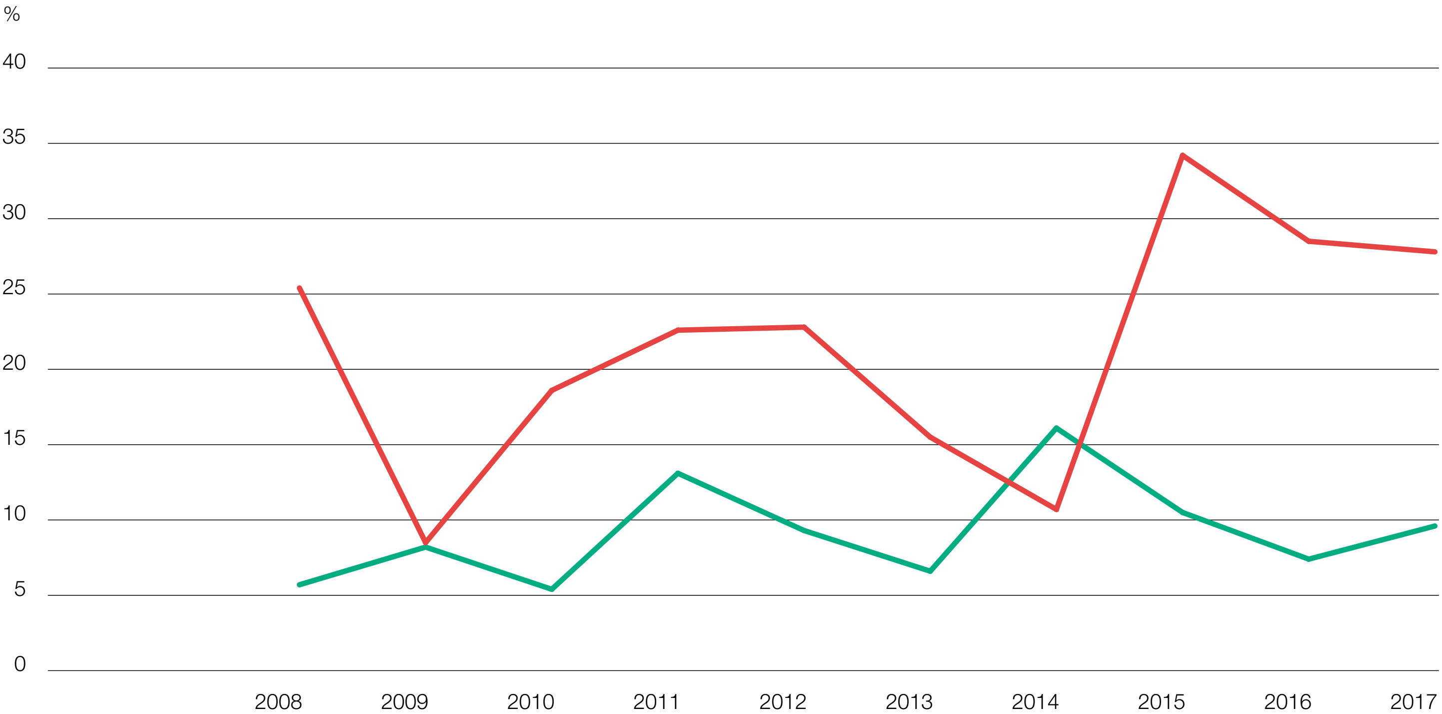
Box office gross = cumulative total up to 18 February 2018.

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

*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.

The fluctuating pattern of UK market share is underlined in Figure 8 with the annual figure dependent on a small number of high grossing titles. The average UK independent market share for the 10-year period was just over 9% with a slight upward trend from a low of just over 5% in 2010.

Figure 8 UK films' share of the UK theatrical market, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK studio-backed*	25.4	8.5	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8
UK independent	5.7	8.2	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6

Source: BFI, RSU

Box office gross = cumulative total up to 18 February 2018.

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

*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.

Image: *Paddington 2* courtesy of StudioCanal

In 2017, 76% of UK films earned less than £1 million at UK and Republic of Ireland cinemas, the same as in 2014 and the lowest figure of the period apart from 2011 (74%). The seven UK films which earned £20 million or more in 2017 equate to 4% of all UK releases in the year, the second highest share of the period. The percentage of UK films earning between £10 and £20 million increased from 3% in 2016 to 4% in 2017. The percentage of UK films that earned between £1 and £5 million was also up, from 10% to 13% (Table 8).

Table 8 UK releases by box office band, 2008-2017 (£ million)

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
2008	Number	3	2	6	17	23	60	**111**
	%	2.7	1.8	5.4	15.3	20.7	54.1	**100.0**
2009	Number	3	-	6	14	21	70	**114**
	%	2.7	-	5.3	12.3	18.4	61.4	**100.0**
2010	Number	3	6	3	10	20	77	**119**
	%	2.5	5.0	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	8.0	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**

Source: comScore, BFI RSU analysis

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

TOP FILMS AT THE BOX OFFICE

Table 9 shows the overall top 20 highest grossing films at the box office in the UK and Republic of Ireland in 2017, combined with the top 20 UK qualifying[1] titles and the top 20 UK independent[2] titles. In total, six of the year's overall top 20 earning films were UK qualifying films, one of which was a UK independent film.

The top performing release at the box office in 2017 was the UK qualifying film, *Star Wars: The Last Jedi,* with earnings (to 18 February 2018) of £83 million. The two next most popular releases were also UK films: the live action remake of Disney's *Beauty and the Beast* (£72 million) and World War II epic *Dunkirk* (£57 million). The top grossing UK independent film of the year was *Paddington 2,* which was fifth in the overall chart with earnings of £43 million.

For the first time since our records began, every overall top 20 title grossed more than £20 million (17 films did so in 2016). Of the top 20 UK films, 13 titles achieved more than £10 million, compared with 11 in 2016. The general upward trend in box office take also applied to independent UK titles where four films grossed above £10 million compared with just one in 2016.

The combined gross of the top 20 UK films, at £464 million (34% of total box office), was up from £395 million in 2016, an increase of 16%. The top 20 UK independent films also generated a greater box office take than in 2016, rising from £85 million to £116 million (up by 37%). In 2017 these films accounted for 8% of total box office revenues, compared with 7% in 2016.

Table 9 Box office results for the top 20 films, top 20 UK qualifying films and top 20 UK independent films released in the UK and Republic of Ireland, 2017

Overall box office rank	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£ million)	Distributor
1	**Star Wars: The Last Jedi***	UK/USA	82.6	723	28.0	Walt Disney
2	**Beauty and the Beast**	UK/USA	72.4	639	19.7	Walt Disney
3	**Dunkirk***	UK/USA	56.7	638	10.1	Warner Bros
4	Despicable Me 3*	USA	47.9	608	11.1	Universal
5	***Paddington 2****	UK/Fra	42.5	607	8.3	StudioCanal
6	Guardians of the Galaxy: Vol. 2	USA/NZ/Can	41.0	633	13.1	Walt Disney
7	Jumanji: Welcome to the Jungle*	USA	37.2	555	8.2	Sony Pictures
8	It	USA/Can	32.3	606	10.0	Warner Bros
9	Thor: Ragnarok	USA	31.1	612	12.4	Walt Disney
10	Spider-Man: Homecoming	USA	30.7	617	9.4	Sony Pictures
11	La La Land	USA/HK	30.5	608	6.6	Lionsgate
12	The Fate of the Furious	USA/Chn/Jpn	30.4	573	14.0	Universal
13	Sing	USA/Jpn	29.7	554	10.5	Universal
14	The Boss Baby	USA	29.5	599	8.0	20th Century Fox
15	The LEGO Batman Movie	USA/Den	29.1	602	7.9	Warner Bros
16	**Kingsman: The Golden Circle**	UK/USA	27.4	602	8.5	20th Century Fox
17	**Murder on the Orient Express***	UK/USA	24.9	613	5.1	20th Century Fox
18	Logan	USA/Can/Aus	24.1	602	9.5	20th Century Fox
19	The Greatest Showman*	USA	23.9	606	4.8	20th Century Fox
20	Fifty Shades Darker	USA/Chn	23.2	605	7.6	Universal

[1] A UK qualifying film is one which is certified as such by the UK Secretary of State for Culture, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production; or a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent; or (in the case of a re-release) a film which met the official definition of a British film prevailing at the time it was made or was generally considered to be British at that time.

[2] A UK independent film is a UK qualifying film produced without creative or financial input from the major US studios.

Table 9 Box office results for the top 20 films, top 20 UK qualifying films and top 20 UK independent films released in the UK and Republic of Ireland, 2017 (continued)

Overall box office rank	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£ million)	Distributor
21	**Wonder Woman**	UK/USA/HK/Chn	22.2	599	6.3	Warner Bros
23	**Pirates of the Caribbean: Salazar's Revenge**	UK/USA	19.5	633	5.2	Walt Disney
25	**Justice League**	UK/USA/Can	17.4	582	7.4	Warner Bros
26	***T2 Trainspotting***	UK/USA#	17.1	590	5.2	Sony Pictures
31	***Baby Driver***	UK/USA#	13.1	543	3.6	Sony Pictures
32	**Alien: Covenant**	UK/USA	12.9	626	5.2	20th Century Fox
37	***Victoria & Abdul***	UK/USA#	10.1	606	1.9	Universal
40	**Transformers: The Last Knight**	UK/USA/Chn/Can	9.5	577	4.6	Paramount
43	**The Mummy**	UK/USA	8.7	573	3.3	Universal
47	**Assassin's Creed**	UK/USA	8.0	527	5.3	20th Century Fox
48	**The Hitman's Bodyguard**	UK/Nld/USA	7.3	467	2.0	Lionsgate
56	***The Death of Stalin***	UK/Fra	5.1	138	1.0	eOne Films
58	**King Arthur: Legend of the Sword**	UK/USA	4.9	564	2.5	Warner Bros
64	**Geostorm**	UK/USA	4.3	477	1.6	Warner Bros
65	***Viceroy's House***	UK/Ind	4.1	453	0.9	20th Century Fox
66	***Their Finest***	UK	4.1	458	0.9	Lionsgate
79	***Goodbye Christopher Robin***	UK/USA#	2.9	573	0.8	20th Century Fox
85	***My Cousin Rachel***	UK	2.6	468	0.7	20th Century Fox
98	***Breathe***	UK	1.7	463	0.5	STX Entertainment
100	***Churchill***	UK	1.7	396	0.4	Lionsgate
101	***Hampstead***	UK	1.6	485	0.5	eOne Films
103	***Battle of the Sexes***	UK/USA#	1.5	466	0.6	20th Century Fox
108	***47 Metres Down***	UK	1.3	392	0.6	eOne Films
111	***The Limehouse Golem***	UK	1.3	361	0.4	Lionsgate
112	***The Sense of an Ending***	UK	1.2	175	0.3	StudioCanal
118	***The Party***	UK	1.1	94	0.2	Picturehouse
120	***Film Stars Don't Die in Liverpool****	UK	1.0	154	0.2	Lionsgate
123	***Free Fire***	UK/USA#	1.0	334	0.5	StudioCanal
124	***Loving Vincent***	UK/Pol/USA#	1.0	115	0.3	Altitude

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 18 February 2018.

* Film still on release on 18 February 2018.

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

UK films are in bold and UK independent films are in bold italics.

THE TOP 3D FILMS

Thirty-seven 3D films were released in 2017, generating £88 million (to 18 February 2018) from their 3D screenings. This is down from 46 releases grossing £93 million in 2016, but it is still greater than the 34 films released in 2015. The combined gross from 3D screenings in 2017 accounted for 6% of total box office receipts compared with 8% (£106 million) in 2016. All but one of the 37 3D films were released in both the 3D and 2D formats. (Data for 3D IMAX screenings and revenues are not disaggregated from 3D totals in the current analysis.)

The top 10 3D releases in 2017 are listed in Table 10. *Star Wars: The Last Jedi* had the highest 3D takings (£18 million) while, of the films shown in both 3D and 2D formats, the Chinese drama *Once Upon a Time* (which does not appear in the top 10) generated the highest proportion of total gross from 3D screenings (59%). Excluding this drama, the median 3D takings for these films as a percentage of total gross was 18%, up from 16% in 2016.

The popularity of 3D films has been on a downtrend from a high point in 2010, when the overall box office gross generated by 3D screenings was £242 million (24% of the total box office) and the median share for 3D screenings as a percentage of total gross for films released in both formats was 71%.

Table 10 Top 10 3D releases in the UK and Republic of Ireland, 2017 (ranked by 3D gross)

	Title	Total gross (£ million)	3D gross (£ million)	3D % of total	Number of 3D sites	Distributor
1	Star Wars: The Last Jedi*	82.6	18.1	22.0	555	Walt Disney
2	Beauty and the Beast	72.4	9.2	12.7	503	Walt Disney
3	Guardians of the Galaxy: Vol. 2	41.0	7.2	17.5	508	Walt Disney
4	Thor: Ragnarok	31.1	5.2	16.8	429	Walt Disney
5	War for the Planet of the Apes	20.8	4.6	22.2	472	20th Century Fox
6	Spider-Man: Homecoming	30.7	4.1	13.6	474	Sony Pictures
7	Kong: Skull Island	15.9	3.4	21.6	448	Warner Bros
8	Blade Runner 2049	19.2	3.1	16.1	411	Sony Pictures
9	Wonder Woman	22.2	3.0	13.6	434	Warner Bros
10	Justice League	17.4	2.9	16.7	454	Warner Bros

Source: comScore

Notes:

Box office gross = cumulative total up to 18 February 2018.

* Film still on release on 18 February 2018.

The 3D grosses include takings from IMAX screenings.

BEST WEEKEND PERFORMANCE OF UK FILMS

A total of 31 different films topped the UK weekend box office charts over the course of 2017. Thirteen of these were UK titles, which spent a combined total of 25 weeks at number one (Table 11). In 2016, 10 UK films achieved the number one slot in the weekend charts for a total of 20 weeks.

Dunkirk, the third highest grossing film of the year, spent four weekends at the top of the box office charts, a number unequalled by any other 2017 release. Unusually, two of the titles held the top spot on non-consecutive weekends. *Blade Runner 2049's* two weekends at the top of the charts were interrupted by *The LEGO Ninjago Movie*, while *Paddington 2's* number one spot was lost to *Justice League* and then *Daddy's Home 2* before being reclaimed for a further two weekends.

Paddington 2 was the only independent UK film to top the weekend charts in 2017, the first to do so since 2015 when *The Second Best Marigold Hotel* (three weeks) and *Legend* (one week) were the number one films at the UK box office.

Table 11 UK films at number one in the weekend box office charts, 2017

Title	First week at top	Opening weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
Dunkirk*	21/07/2017	10.0	56.7	Warner Bros	4
Star Wars: The Last Jedi*	15/12/2017	28.0	82.6	Walt Disney	3
Beauty and the Beast	17/03/2017	19.7	72.4	Walt Disney	3
Paddington 2*	10/11/2017	8.3	42.5	StudioCanal	3
Wonder Woman	02/06/2017	6.2	22.2	Warner Bros	3
Kingsman: The Golden Circle	22/09/2017	8.5	27.4	20th Century Fox	2
Justice League	17/11/2017	7.3	17.4	Warner Bros	1
Assassin's Creed	06/01/2017	5.3	8.0	20th Century Fox	1
Pirates of the Caribbean: Salazar's Revenge	26/05/2017	5.2	19.5	Walt Disney	1
Alien: Covenant	12/05/2017	5.2	12.9	20th Century Fox	1
Murder on the Orient Express	03/11/2017	5.0	24.9	20th Century Fox	1
Transformers: The Last Knight	23/06/2017	4.6	9.5	Paramount	1
King Arthur: Legend of the Sword	19/05/2017	2.5	4.9	Warner Bros	1

Source: comScore, BFI RSU analysis
Notes:
Box office gross = cumulative total up to 18 February 2018.
* Film still on release on 18 February 2018.

TOP 20 FILMS AT THE UK BOX OFFICE, 1975-2017

Table 12 shows an inflation-adjusted box office chart based on the top 20 highest grossing films released in the UK since 1975 (when coverage of leading titles began). The 2015 release *Star Wars: The Force Awakens* tops the table, with an inflation-adjusted box office gross of £126 million. Three other films from the Star Wars franchise feature in the top 20: the latest instalment *Star Wars: The Last Jedi* (£83 million) is in eighth place, 1999's *Star Wars Episode I: The Phantom Menace* (£79 million) is in 13th, and 1977's now re-titled *Star Wars: A New Hope* (£74 million) is in 18th place.

The inflation-adjusted top 20 is dominated by franchise movies. In addition to the four Star Wars titles, it includes three Harry Potter films, the Lord of the Rings trilogy and two Daniel Craig era James Bond films. The only top 20 films released since 1975 which are neither part of a series or franchise are *Titanic* and *The Full Monty*. (Since publication of the 2016 Statistical Yearbook, a sequel to *Mamma Mia!* has been completed and production has begun on two sequels to *Avatar*.)

Ten of the top 20 films are UK/USA collaborations, and the same number are based on stories and characters created by UK writers such as Ian Fleming, JK Rowling and JRR Tolkien, which shows the sustained appetite for home-grown material amongst British audiences. Nine of the top 20 films were released in the last decade, two of which were from 2017 - *Star Wars: The Last Jedi* and *Beauty and the Beast.*

Table 12 Top 20 highest grossing films at the UK box office, 1975-2017 (inflation adjusted[1])

Rank	Title	Country of origin	Box office gross (£ million)	Distributor	Year of release
1	Star Wars: The Force Awakens	UK/USA	125.7	Walt Disney	2015
2	Titanic	USA	113.2	20th Century Fox	1998/2012/2017
3	Skyfall	UK/USA	109.6	Sony Pictures	2012
4	Avatar	USA	105.1	20th Century Fox	2009
5	SPECTRE	UK/USA	97.1	Sony Pictures	2015
6	Harry Potter and the Philosopher's Stone	UK/USA	89.1	Warner Bros	2001
7	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	85.6	Entertainment	2001
8	Star Wars: The Last Jedi*	UK/USA	82.6	Walt Disney	2017
9	Toy Story 3	USA	81.5	Walt Disney	2010
10	Jaws	USA	80.6	UIP	1975
11	The Lord of the Rings: The Return of the King	USA/NZ	79.2	Entertainment	2003
12	Harry Potter and the Deathly Hallows: Part 1	UK/USA	78.9	Warner Bros	2011
13	Star Wars Episode I: The Phantom Menace	USA	78.8	20th Century Fox	1999/2012
14	Mamma Mia!	UK/USA	77.8	Universal	2008
15	The Lord of the Rings: The Two Towers	USA/NZ	76.6	Entertainment	2002
16	Jurassic Park	USA	75.8	UIP	1993/2013
17	The Full Monty	UK/USA	74.5	20th Century Fox	1997
18	Star Wars: A New Hope	USA	74.4	20th Century Fox	1977
19	Harry Potter and the Chamber of Secrets	UK/USA	72.8	Warner Bros	2002
20	Beauty and the Beast	UK/USA	72.4	Walt Disney	2017

Source: comScore, BFI RSU analysis

Notes:

[1] The 2017 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2017-quarterly-national-accounts

Box office gross = cumulative total up to 18 February 2018.

* Film still on release on 18 February 2018.

The box office grosses for *Titanic, Star Wars Episode I: The Phantom Menace* and *Jurassic Park* include the grosses from their original releases, plus revenues from their subsequent 3D or anniversary re-releases.

Table 13 shows an inflation-adjusted box office chart based on the top 20 highest grossing UK qualifying films released in the UK since 1989. The list is solely comprised of US studio-backed features. *Star Wars: The Force Awakens* tops the list with an inflation-adjusted gross of £126 million, followed by *Skyfall* (£110 million) and *SPECTRE* (£97 million). In addition to the latter two titles, the list also contains the first two Bond outings to star Daniel Craig, *Casino Royale* and *Quantum of Solace*, which are 11th and 17th in the list respectively. The top 20 is dominated, however, by the Harry Potter franchise with seven of the eight films appearing in the list. The first film in the series, *Harry Potter and the Philosopher's Stone*, is ranked highest at number four. The oldest film in the list is *The Full Monty* (1997) which appears at number eight with an inflation-adjusted gross of £74.5 million.

The top three highest earning films of 2017 appear in the list: *Star Wars: The Last Jedi, Beauty and the Beast* and *Dunkirk*.

Table 13 Top 20 UK qualifying films at the UK box office, 1989-2017 (inflation adjusted[1])

	Title	Country of origin	UK box office total (2017 £ million)	Distributor	Year of release
1	Star Wars: The Force Awakens	UK/USA	125.7	Walt Disney	2015
2	Skyfall	UK/USA	109.6	Sony Pictures	2012
3	SPECTRE	UK/USA	97.1	Sony Pictures	2015
4	Harry Potter and the Philosopher's Stone	UK/USA	89.1	Warner Bros	2001
5	Star Wars: The Last Jedi*	UK/USA	82.6	Walt Disney	2017
6	Harry Potter and the Deathly Hallows: Part 2	UK/USA	78.9	Warner Bros	2011
7	Mamma Mia!	UK/USA	77.8	Universal	2008
8	The Full Monty	UK/USA	74.5	20th Century Fox	1997
9	Harry Potter and the Chamber of Secrets	UK/USA	72.8	Warner Bros	2002
10	Beauty and the Beast	UK/USA	72.4	Walt Disney	2017
11	Casino Royale	UK/USA/Cze	66.5	Sony Pictures	2006
12	Rogue One: A Star Wars Story	UK/USA	66.0	Walt Disney	2016
13	Harry Potter and the Goblet of Fire	UK/USA	60.7	Warner Bros	2005
14	The Dark Knight Rises	UK/USA	59.7	Warner Bros	2012
15	Harry Potter and the Prisoner of Azkaban	UK/USA	58.3	Warner Bros	2004
16	Harry Potter and the Order of the Phoenix	UK/USA	58.2	Warner Bros	2007
17	Quantum of Solace	UK/USA	58.1	Sony Pictures	2008
18	Harry Potter and the Deathly Hallows: Part 1	UK/USA	57.7	Warner Bros	2010
19	Bridget Jones's Diary	UK/USA	57.0	UIP	2001
20	Dunkirk	UK/USA	56.7	Warner Bros	2017

Notes:

[1] The 2017 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2017-quarterly-national-accounts.

Box office gross = cumulative total up to 18 February 2018.

* Film still on release on 18 February 2018.

Table 14 shows an inflation-adjusted box office chart based on the top 20 highest grossing independent UK films released at the UK box office since 1979 (when coverage of leading titles began). *The King's Speech* and *The Inbetweeners Movie*, both of which were released in 2011, top the table with inflation-adjusted grosses of £49.3 million and £48.6 million respectively. *Four Weddings and a Funeral* (1994) is in third place with £42.6 million, the 2017 release *Paddington 2* is fourth with £42.5 million, and the original *Paddington* (2014)) is fifth with £38.9 million. The oldest film in the list is the 1979 release *Monty Python's Life of Brian* which is in ninth place with £23.3 million.

In addition to *Paddington 2*, one other release from 2017 appears in the list - *T2 Trainspotting* is in 17th place with earnings of £17.1 million.

Table 14 Top 20 highest grossing UK independent films at the UK box office, 1979-2017 (inflation adjusted[1])

	Title	Country of origin	UK box office total (2017 £ million)	Distributor	Year of release
1	The King's Speech	UK	49.3	Momentum/Alliance	2011
2	The Inbetweeners Movie	UK	48.6	Entertainment	2011
3	Four Weddings and a Funeral	UK	42.6	Carlton	1994
4	Paddington 2*	UK/Fra	42.5	StudioCanal	2017
5	Paddington	UK/Fra	38.9	StudioCanal	2014
6	Slumdog Millionaire	UK	35.4	Pathé	2009
7	The Inbetweeners 2	UK	34.2	Entertainment	2014
8	A Fish Called Wanda	UK/USA#	24.5	UIP	1988
9	Monty Python's Life of Brian	UK	23.3	UIP	1979
10	The Woman in Black	UK/USA#	22.7	Momentum/Alliance	2012
11	Shirley Valentine	UK	21.8	UIP	1989
12	The Best Exotic Marigold Hotel	UK/USA/Ind#	21.7	20th Century Fox	2012
13	Gandhi	UK/Ind	21.4	Sony Pictures	1982
14	Flash Gordon	UK	21.1	EMI	1980
15	Legend	UK/Fra/USA#	18.7	StudioCanal	2015
16	Trainspotting	UK	17.9	Rank/PolyGram	1996
17	T2 Trainspotting	UK/USA#	17.1	Sony Pictures	2017
18	The Imitation Game	UK/USA#	16.8	StudioCanal	2014
19	Gosford Park	UK/USA#	16.4	Entertainment	2002
20	The Second Best Exotic Marigold Hotel	UK/USA#	16.4	20th Century Fox	2015

Source: comScore, BFI RSU analysis

Notes:

[1] The 2017 £ is calculated using the HMT UK GDP deflator which can be found at https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-december-2017-quarterly-national-accounts.

Box office gross = cumulative total up to 18 February 2018.

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

SPECIALISED RELEASES: DOCUMENTARIES, FOREIGN LANGUAGE FILMS AND RE-RELEASES AT THE UK BOX OFFICE IN 2017

In total, 456 documentaries, foreign language films and re-releases were shown at UK cinemas in 2017, representing 60% of all theatrical releases in the year (Table 15). These films grossed £39 million, a 3% share of total box office earnings.

Table 15 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2017

Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	89	11.7	4.3	0.3	22
Foreign language	349	45.9	28.6	2.1	26
Re-release	40	5.3	6.4	0.5	35
All specialised films*	456	60.0	38.6	2.8	26
All films	760	100.0	1,376.9	100.0	112

Source: comScore, BFI RSU analysis

Notes:

* Due to some overlap of categories (eg a film such as *Kedi* 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 18 February 2018.

TRENDS IN SPECIALISED FILM

As with film overall, the volume of specialised films released into British cinemas declined slightly in 2017 compared with the previous year. The general trend, however, continues to be upward, with the number of specialised films released in total in 2016 and 2017 nearly double that of 10 years ago (Figure 9).

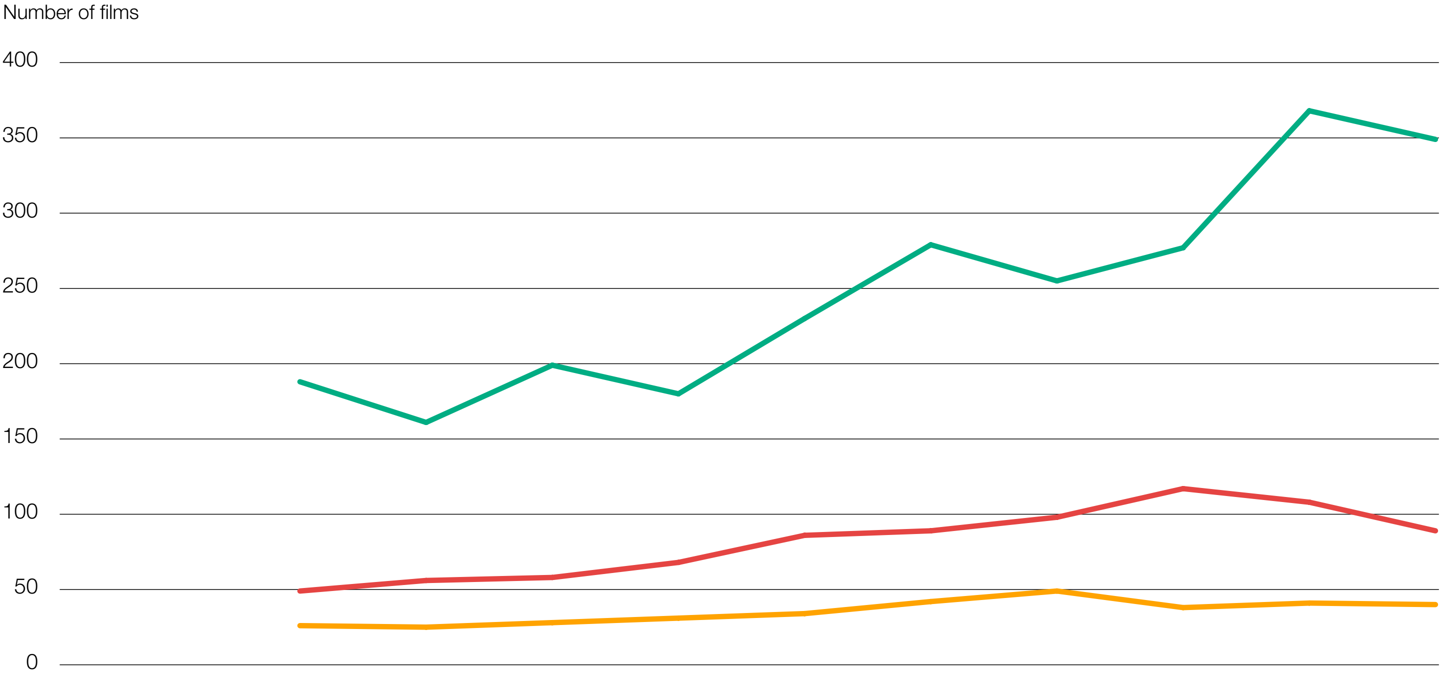
Foreign language films in particular have seen increases and whilst they continue to deliver a very small share of total box office revenues, there is evidence that there is a greater appetite amongst a more ethnically diverse UK population for a wider range of films not made in the English language.

Specialised film

The BFI considers most feature documentaries, subtitled foreign language films and re-releases of archive/classic films to be specialised. In recent years some mainstream films, such as *Terminator 2: Judgement Day* (released in 2017), which were originally made and shown in 2D, have been officially 're-released' in the 3D format. These 're-releases' are not considered as specialised films in the present analyses.

Unlike previous years, other non-mainstream films that do not fall into the above categories but are considered to be specialised are not included in the data, due to the subjectivity regarding the definition of these films. Generally these films were described as having a distinctive genre, hook or style, as less easy to define as a particular genre 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, refer to the Distribution and exhibition chapter.)

Figure 9 Documentaries, foreign language films and re-releases in the UK and Republic of Ireland, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Documentary	49	56	58	68	86	89	98	117	108	89
Foreign language	188	161	199	180	230	279	255	277	368	349
Re-release	26	25	28	31	34	42	49	38	41	40

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.

Image: *The Handmaiden* courtesy of Curzon Artificial Eye

NON-ENGLISH LANGUAGE FILMS

Films in 39 different languages (including English) were released in the UK and Republic of Ireland in 2017, four fewer than in 2016. There were also two releases with no spoken dialogue: the re-release of Fritz Lang's 1921 silent classic *Der müde Tod* and the first non-Japanese animated title produced by Studio Ghibli, *The Red Turtle*.

Foreign language films accounted for 46% of all theatrical releases in 2017 and earned £29 million (2% of overall box office gross). There were 349 foreign language film releases, down from 368 in 2016. In terms of both number of releases and box office gross, films in Hindi were the most popular non-English language releases in 2017, generating £11 million from 52 titles.

Table 16 shows box office takings for films in English and English with other languages, followed by the top 10 earning non-English languages for film releases in 2017.

Table 16 Languages of films released in the UK and Republic of Ireland, 2017 (ranked by gross box office)

	Main language	Number of releases	Gross box office (£ million)	Box office share (%)
1	English	385	1,237.7	90.6
2	English with others	27	99.8	7.3
3	Hindi	52	10.6	0.8
4	French	35	2.7	0.2
5	Polish	15	2.2	0.2
6	Tamil	35	1.8	0.1
7	Telugu	11	1.5	0.1
8	Korean	7	1.4	0.1
9	Japanese	18	1.3	0.1
10	Urdu	9	1.0	0.1
11	Punjabi	22	0.9	0.1
12	German	7	0.7	<0.1
	Others (28 languages)	138	4.5	0.3

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 *Personal Shopper* in English and French.

Figures as at 18 February 2018.

Table 17 shows the top 10 highest earning non-Hindi foreign language films of 2017. Three of the top 10 titles hail from the Indian subcontinent including the epic blockbuster *Baahubali 2: The Conclusion*, which took £1.4 million at the UK and Republic of Ireland box office. (This film was simultaneously released in Hindi, Malayalam and Telugu versions, but as this is a Telugu production this has been assigned as its primary language.) There is one Urdu language film (*Punjab Nahi Jaungi*) and one Tamil language film (*Mersal*). Other Asian language releases include the winner of the 2018 BAFTA for best foreign language film *The Handmaiden* (in Korean) and *Pokémon The Movie: I Choose You!* (in Japanese).

The remaining five films in the table are in European languages, including two French language releases - *Elle* and *Happy End* - and two films in Polish - *Botoks* and *Listy do M3*. Polish language films have become an increasing presence in this table in recent years, reflecting the fact that Polish is now the most commonly spoken non-native language in England and Wales (2011 Census).

Table 17 Top 10 foreign language films (excluding Hindi*) released in the UK and Republic of Ireland, 2017

	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	Baahubali 2: The Conclusion	Ind	1.4	Hamsini Entertainment/DCP	Telugu
2	The Handmaiden	S.Kor	1.4	Curzon Artificial Eye	Korean
3	Botoks	Pol	1.1	Phoenix	Polish
4	Elle	Fra/Ger/Bel	0.9	Lionsgate	French
5	Punjab Nahi Jaungi	Pak	0.6	B4U	Urdu
6	Toni Erdmann	Ger/Aus/Swi/Rom/Fra	0.6	Thunderbird Releasing	German
7	Mersal	Ind	0.6	Murugan Talkies	Tamil
8	Listy do M3	Pol	0.5	Phoenix	Polish
9	Pokémon The Movie: I Choose You!	Jpn	0.4	StudioCanal	Japanese
10	Happy End	Fra/Aus/Ger	0.4	Curzon Artificial Eye	French

Source: comScore, BBFC, IMDb, BFI RSU analysis, distributor websites
Notes:
* For Hindi language titles, see Table 18.
Figures as at 18 February 2018.

Table 18 shows the top 10 Hindi language film releases of 2017. The list is headed by the overall top earning foreign language film of the year, *Tiger Zinda Hai*, with box office takings of £1.8 million. The second most popular Hindi release of the year was the crime thriller *Raees*, the only other Hindi film to break the £1-million barrier in the UK in 2017.

Table 18 Top 10 Hindi language films released in the UK and Republic of Ireland, 2017

	Title	Country of origin	UK box office total (£ million)	Distributor
1	Tiger Zinda Hai	Ind	1.8	Yash Raj
2	Raees	Ind	1.3	Zee Studios
3	Jab Harry Met Sejal	Ind	0.6	Yash Raj
4	Tubelight	Ind	0.6	Yash Raj
5	Secret Superstar	Ind	0.6	Zee Studios
6	Golmaal Again	Ind	0.5	Reliance Entertainment
7	Kaabil	Ind	0.5	B4U Networks
8	Judwaa 2	Ind	0.5	20th Century Fox
9	Badrinath Ki Dulhania	Ind	0.4	20th Century Fox
10	Toilet: Ek Prem Katha	Ind	0.3	Reliance Entertainment

Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 18 February 2018.

Table 19 shows the 10 highest grossing non-English language films released in the UK and Republic of Ireland between 2001 and 2017. The most recent addition to the list is the 2013 release *Dhoom: 3* (the first film in Hindi to appear in the top 10 since our records began), indicating that despite the growing number of foreign language films released in the UK, most continue to have niche or limited appeal.

The top film is the 2004 release *The Passion of the Christ* (£11.1 million), followed by *Crouching Tiger, Hidden Dragon* (£9.4 million) which was released in 2001. *Crouching Tiger, Hidden Dragon* is one of three Mandarin language films in the list, all of which are wuxia martial arts titles, which reflects the popularity of the genre with UK audiences in the early 2000s. There are also three Spanish language films in the list (two from Spain and one from South America), and one French language title.

Table 19 Top 10 non-English language films released in the UK and Republic of Ireland, 2001-2017

	Title	Language	UK box office total (£ million)	Distributor	Year of release
1	The Passion of the Christ	Aramaic/Latin/Hebrew	11.1	Icon	2004
2	Crouching Tiger, Hidden Dragon	Mandarin	9.4	Sony Pictures	2001
3	Amélie	French/Russian	5.0	Momentum	2001
4	Apocalypto	Mayan	4.1	Icon	2007
5	Hero	Mandarin	3.8	Walt Disney	2004
6	House of Flying Daggers	Mandarin	3.8	Pathé	2004
7	Volver	Spanish	2.9	Pathé	2006
8	The Motorcycle Diaries	Spanish	2.8	Pathé	2004
9	Pan's Labyrinth	Spanish	2.7	Optimum	2006
10	Dhoom: 3	Hindi	2.7	Yash Raj	2013

Source: comScore, BFI RSU analysis

DOCUMENTARIES

A total of 89 feature documentaries (12% of theatrical releases) were shown at the UK and Republic of Ireland box office in 2017, down from 108 in 2016. These films earned £4.3 million which was 0.3% of the overall box office gross.

We have split the analysis of this category into the more traditional expository or observational style of documentary and 'concert' documentaries, which feature coverage of a particular performance and behind-the-scenes footage of popular musical performers. The most successful traditional documentary of 2017 was *Conor McGregor: Notorious*, a fly-on-the-wall portrait of the Irish mixed martial arts star, which grossed £430,000, while the top earning concert documentary was *Slipknot: Day of the Gusano* with £47,000. Neither of these films appear in the following two tables.

Table 20 shows the top 20 non-concert documentaries released in the UK and Republic of Ireland since 2002. The list is headed by Michael Moore's *Fahrenheit 9/11*, which earned £6.5 million in 2004. (This is regarded as the highest grossing non-concert documentary of all time because, even with price inflation, it is unlikely that any documentary films before 2002 will have earned more in nominal terms.) Asif Kapadia's 2015 release *Amy* (£3.8 million) is second, and the 2005 natural history release *March of the Penguins* (£3.3 million) is third. The most recent additions to the list are the 2016 releases *My Scientology Movie, Oasis: Supersonic* and *One More Time with Feeling.*

Twelve of the top 20 non-concert documentaries released since 2002 are UK films.

Table 20 Top 20 non-concert feature documentaries released in the UK and Republic of Ireland, 2002-2017

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Fahrenheit 9/11	USA	2004	6.5	200	Optimum
2	Amy	UK	2015	3.8	280	Altitude
3	March of the Penguins	Fra	2005	3.3	163	Warner Bros
4	Senna	UK	2011	3.2	358	Universal
5	Touching the Void	UK	2003	2.6	50	Pathé
6	Bowling for Columbine	USA	2002	1.7	37	Momentum
7	TT3D: Closer to the Edge	UK	2011	1.3	125	CinemaNX
8	The Imposter	UK/USA	2012	1.1	77	Picturehouse/Revolver
9	Super Size Me	USA	2004	1.1	83	Tartan
10	My Scientology Movie	UK/USA	2016	1.1	76	Altitude
11	Marley	UK/Jam/USA	2012	1.0	333	Universal
12	An Inconvenient Truth	USA	2006	0.9	68	Paramount
13	Man on Wire	UK/USA	2008	0.9	43	Icon
14	Oasis: Supersonic	UK	2016	0.8	387	eOne Films
15	Être et Avoir	Fra	2003	0.7	15	Tartan
16	Pina	Ger/Fra	2011	0.7	26	Artificial Eye
17	Cave of Forgotten Dreams	UK/Can/Fra/Ger/USA	2011	0.6	39	Picturehouse
18	20,000 Days on Earth	UK	2014	0.6	33	Picturehouse
19	Spellbound	USA	2003	0.5	17	Metrodome
20	One More Time with Feeling	UK	2016	0.4	156	Picturehouse

Source: comScore, BFI RSU analysis

Notes:

The table does not include concert performance documentaries, IMAX-only documentaries and shorts.

Based on box office data for 2002-2017.

Table 21 shows the top 10 concert documentaries released in the UK since 2008. The highest grossing title released during the period is *Michael Jackson's This Is It*, which earned £9.8 million in 2009. The most recent addition to the list is the 2016 release *The Beatles: Eight Days a Week.*

Table 21 Top 10 highest grossing concert documentaries released in the UK and Republic of Ireland, 2008-2017

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Michael Jackson's This Is It	USA	2009	9.8	498	Sony Pictures
2	One Direction: This Is Us	UK/USA	2013	8.0	479	Sony Pictures
3	Justin Bieber: Never Say Never	USA	2011	2.3	388	Paramount
4	The Beatles: Eight Days a Week	USA	2016	1.2	102	StudioCanal
5	Katy Perry: Part of Me	USA	2012	1.2	326	Paramount
6	Hannah Montana/Miley Cyrus: Best of Both Worlds Concert	USA	2008	0.8	65	Walt Disney
7	U2 3D	USA	2008	0.7	67	Revolver
8	Glee: The 3D Concert Movie	USA	2011	0.7	335	20th Century Fox
9	Shine a Light	USA/UK	2008	0.7	159	20th Century Fox
10	JLS: Eyes Wide Open 3D	UK	2011	0.5	210	Omniverse

Source: comScore, BFI RSU analysis

RE-RELEASES

In 2017, 40 archive/classic titles were re-released in the UK and Republic of Ireland, one less than in 2016. According to comScore, these films accounted for 5% of the year's theatrical releases and generated a combined gross of £6.4 million (0.5% of the total box office). However, not all box office revenues for re-releases are tracked by comScore, which primarily focuses on first-run films. Some additional revenue for films, which tend to be booked for a limited time into specialised cinemas long after their initial release, is missing from this analysis, so the actual box office share is likely to be greater. (The comScore total includes the re-release of Baz Luhrmann's *Moulin Rouge!*, which earned £4.5 million - 70% of the year's total box office for this category - from its release as a Secret Cinema presentation. However, this film is not included in the following table.)

Table 22 shows the top 10 specialised re-releases at UK and Republic of Ireland cinemas since 2000. (The table does not include titles originally released in 2D which were re-released in 3D, as these are considered to be mainstream films rather than specialised. It also excludes Secret Cinema releases as these have a unique exhibition style.) The list is topped by Stanley Kubrick's *A Clockwork Orange*, which grossed £2.1 million from its 2000 re-release. Two other specialised re-releases have grossed over £1 million – Steven Spielberg's 20th anniversary re-release of *E.T.* (2002) and the 25th anniversary re-release of sci-fi comedy *Back to the Future* (2010). There are no new entries to the list. The oldest film in the table is Luchino Visconti's *The Leopard*, which was originally released in 1963; it is in 10th place with earnings of £0.3 million from its re-release in 2003.

Table 22 Top 10 highest grossing re-releases at the UK and Republic of Ireland box office, 2000-2017

	Title (year of original release)	Country of origin	Year of re-release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	A Clockwork Orange (1972)	UK	2000	2.1	328	Warner Bros
2	E.T. (20th anniversary) (1982)	USA	2002	2.1	313	UIP
3	Back to the Future (25th anniversary) (1985)	USA	2010	1.2	273	Universal
4	Blade Runner: The Final Cut (1982)	UK/USA/HK	2015	0.8	136	BFI
5	Alien (Director's Cut) (1979)	UK/USA	2003	0.5	134	20th Century Fox
6	Jurassic Park (1993)	USA	2011	0.5	277	Universal
7	Apocalypse Now (Redux) (1979)	USA	2001	0.5	22	Walt Disney
8	Jaws (1975)	USA	2012	0.4	319	Universal
9	2001: A Space Odyssey (1968)	UK/USA	2014	0.4	60	BFI
10	The Leopard (1963)	Ita/Fra	2003	0.3	5	BFI

Source: comScore, BFI RSU analysis

RELEASES AND BOX OFFICE BY GENRE

Table 23 shows the relative popularity of different genres at the box office in the UK and Republic of Ireland in 2017. The pattern of box office by genre each year is usually determined by a small number of high grossing releases. For the third consecutive year, action was the top earning genre with a combined gross of £320 million, followed by animation with £212 million and sci-fi with £152 million. The high ranking achieved by sci-fi films despite the low number of releases in this category is due in part to the success of the latest Star Wars film which generated over half (54%) of the total box office for this genre. Drama had the highest proportion of releases (31%) but earned only 11% of the total box office gross.

Five of the top performing titles by genre were UK films, which highlights the variety of story types which underpin British film success. In addition to the top film of the year, *Star Wars: The Last Jedi*, these were *Beauty and the Beast, Dunkirk, Paddington 2* and *Murder on the Orient Express*.

Genre in the Statistical Yearbook

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

Table 23 Films released in the UK and Republic of Ireland by genre, 2017 (ranked by gross box office)

Genre	Number of releases	% of releases	Gross box office (£ million)	% of total box office	Top performing title
Action	83	10.9	319.8	23.2	Guardians of the Galaxy: Vol. 2
Animation	48	6.3	211.7	15.4	Despicable Me 3
Sci-fi	14	1.8	152.2	11.1	Star Wars: The Last Jedi
Drama	236	31.1	144.3	10.5	Fifty Shades Darker
Comedy	129	17.0	94.4	6.9	Pitch Perfect 3
Fantasy	7	0.9	83.8	6.1	Beauty and the Beast
Horror	29	3.8	66.2	4.8	It
Music/dance	6	0.8	65.5	4.8	La La Land
War	3	0.4	62.4	4.5	Dunkirk
Adventure	10	1.3	56.4	4.1	Jumanji: Welcome to the Jungle
Family	4	0.5	42.7	3.1	Paddington 2
Crime	11	1.4	29.0	2.1	Murder on the Orient Express
Thriller	64	8.4	26.7	1.9	Split
Biopic	17	2.2	13.2	1.0	Jackie
Romance	10	1.3	4.4	0.3	Everything, Everything
Documentary	89	11.7	4.3	0.3	Conor McGregor: Notorious
Total	**760**	**100.0**	**1,376.9**	**100.0**	

Source: comScore, BFI RSU analysis

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

The pattern of genres ranked by the average number of sites at the widest point of release (WPR) is shown in Table 24. The top three genres by average WPR in 2017 were war, sci-fi and fantasy. The averages are skewed, however, by the low number of releases in these categories, particularly the war genre, and the inclusion of studio-backed titles which are typically released into more cinemas than other films. The titles with the highest individual WPRs in each of these genres were also the top earning films in their categories: *Dunkirk* (WPR of 638); *Star Wars: The Last Jedi* (WPR of 723); and *Beauty and the Beast* (WPR of 639).

Table 24 Films released in the UK and Republic of Ireland by genre, 2017 (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
War	3	62.4	385	19
Sci-fi	14	152.2	368	12
Fantasy	7	83.8	361	17
Animation	48	211.7	242	17
Music/dance	6	65.5	232	14
Family	4	42.7	205	9
Adventure	10	56.4	177	7
Action	83	319.8	168	7
Horror	29	66.2	167	8
Biopic	17	13.2	139	17
Crime	11	29.0	132	9
Romance	10	4.4	107	9
Comedy	129	94.4	87	8
Thriller	64	26.7	82	7
Drama	236	144.3	80	11
Documentary	89	4.3	22	10
Total	**760**	**1,376.9**	**112**	**10**

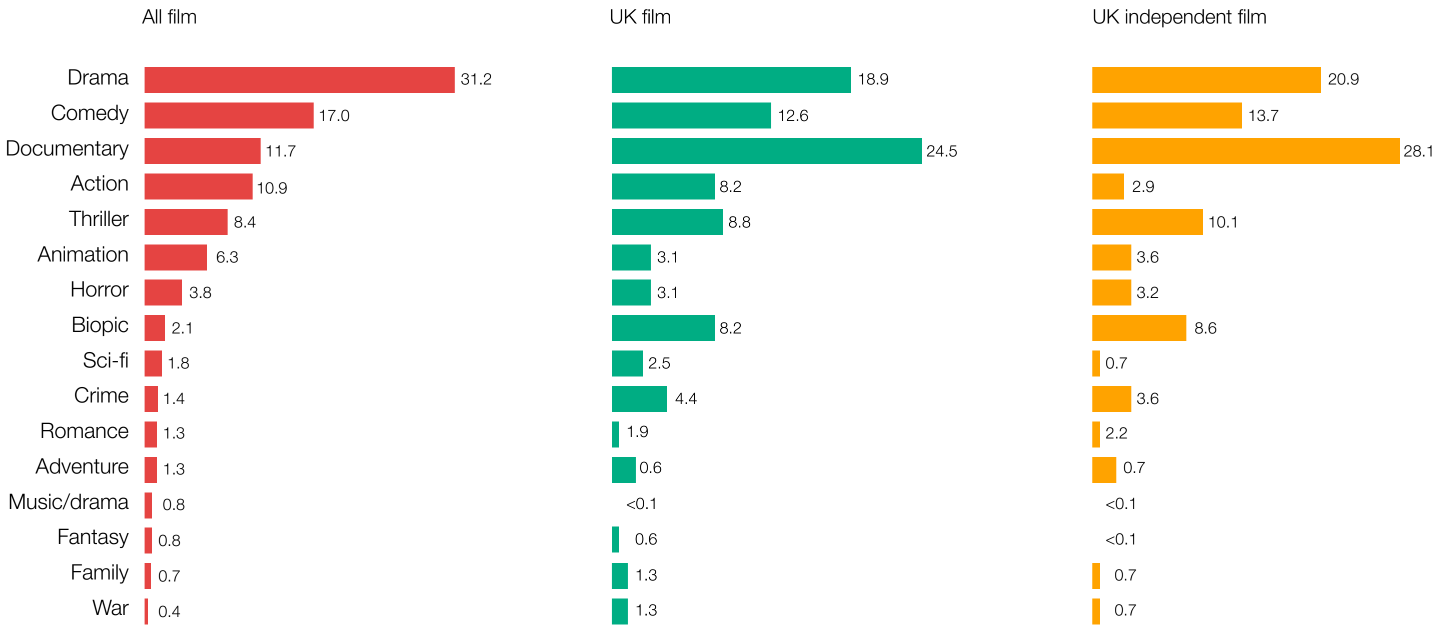
Source: comScore, BFI RSU analysis

Image: *Dunkirk* © 2016 Warner Bros. Entertainment Inc., Ratpac-Dune Entertainment LLC and Ratpac Entertainment, LLC

Figures 10 and 11 show a comparison of the share of releases and gross box office by genre for all films, UK films and UK independent films in 2017. The rankings in terms of percentage of releases by genre are mainly similar across all three categories of film releases, but differ in terms of box office share.

Drama, comedy and documentary were the most popular genres in terms of numbers of releases for all three categories (Figure 10). Drama had the highest proportion of releases by genre for all films with 31%, followed by comedy (17%) and documentary (12%), while documentary had the highest proportion of releases by genre for both UK films (25%) and UK independent films (28%), followed by drama (19% and 21% respectively) and comedy (13% and 14% respectively).

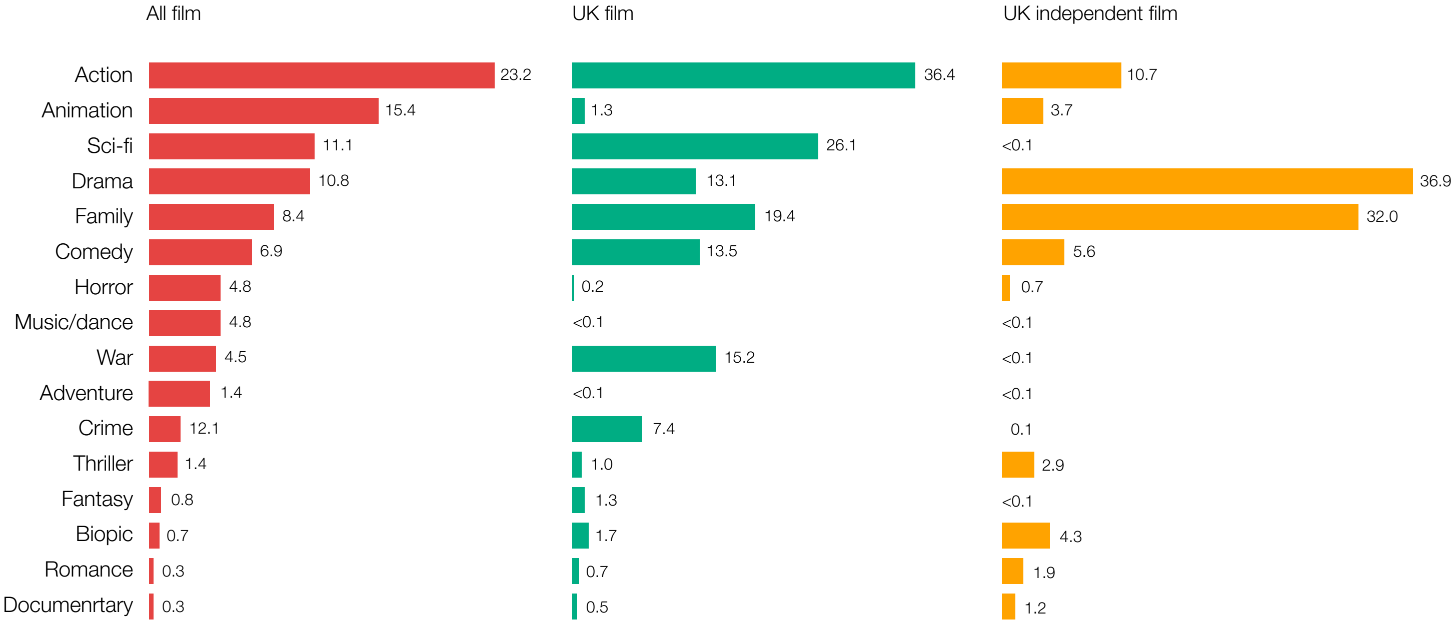
Figure 10 Percentage of releases by genre for all films, UK films and UK independent films, 2017



Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 18 February 2018.

However, when looking at box office by genre, there are some differences between the three categories (Figure 11). For both all films and UK films action was the highest earning genre taking 23% and 26% respectively of the total box office, while drama was the top grossing genre for UK independent films, taking just over 37%. The categories differ for the next highest earning genres: for all films, animation was the second highest earning genre with 15% of the total box office, sci-fi was second for UK films (19% of box office) and for UK independent films family was second (32%). The third highest earning genre also differed across the three categories: for all films it was sci-fi (11%), for UK films it was family (14%), and for UK independent films it was action (11%). The top three genres for UK independent film accounted for 80% of the total box office for these films.

Figure 11 Percentage of box office by genre for all films, UK films and UK independent films, 2017



Source: comScore, BBFC, IMDb, BFI RSU analysis
Note: Figures as at 18 February 2018.

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 25 provides a picture of how 2017 releases were classified. It shows that, as in previous years, more '15' films (39%) were released than any other category, but the largest share of box office gross was earned by '12A' films (44%). The proportion of '15' films released (39%) was lower than in 2016 (44%) while the proportion of '12A' films, at 36%, was slightly higher than in 2016 (35%). The 36% share for the '12A' classification is the highest recorded since its introduction in 2002. The '15' classification accounted for 22% of the gross box office in 2017 compared with 32% in 2016.

Table 25 All releases in the UK and Republic of Ireland by BBFC film classification, 2017

	Number of releases	% of all UK releases	Gross box office (£ million)	% of gross box office	Top performing title
U	34	4.5	215.3	15.6	Despicable Me 3
PG	96	12.6	194.2	14.1	Beauty and the Beast
12A	277	36.4	604.5	43.9	Star Wars: The Last Jedi
15	297	39.1	307.3	22.3	It
18	48	6.3	55.6	4.0	Fifty Shades Darker
No classification	8	1.1	<0.1	<0.1	Uncertain
Total	**760**	**100.0**	**1,376.9**	**100.0**	

Source: comScore, BBFC, BFI RSU analysis

Note: Figures as at 18 February 2018.

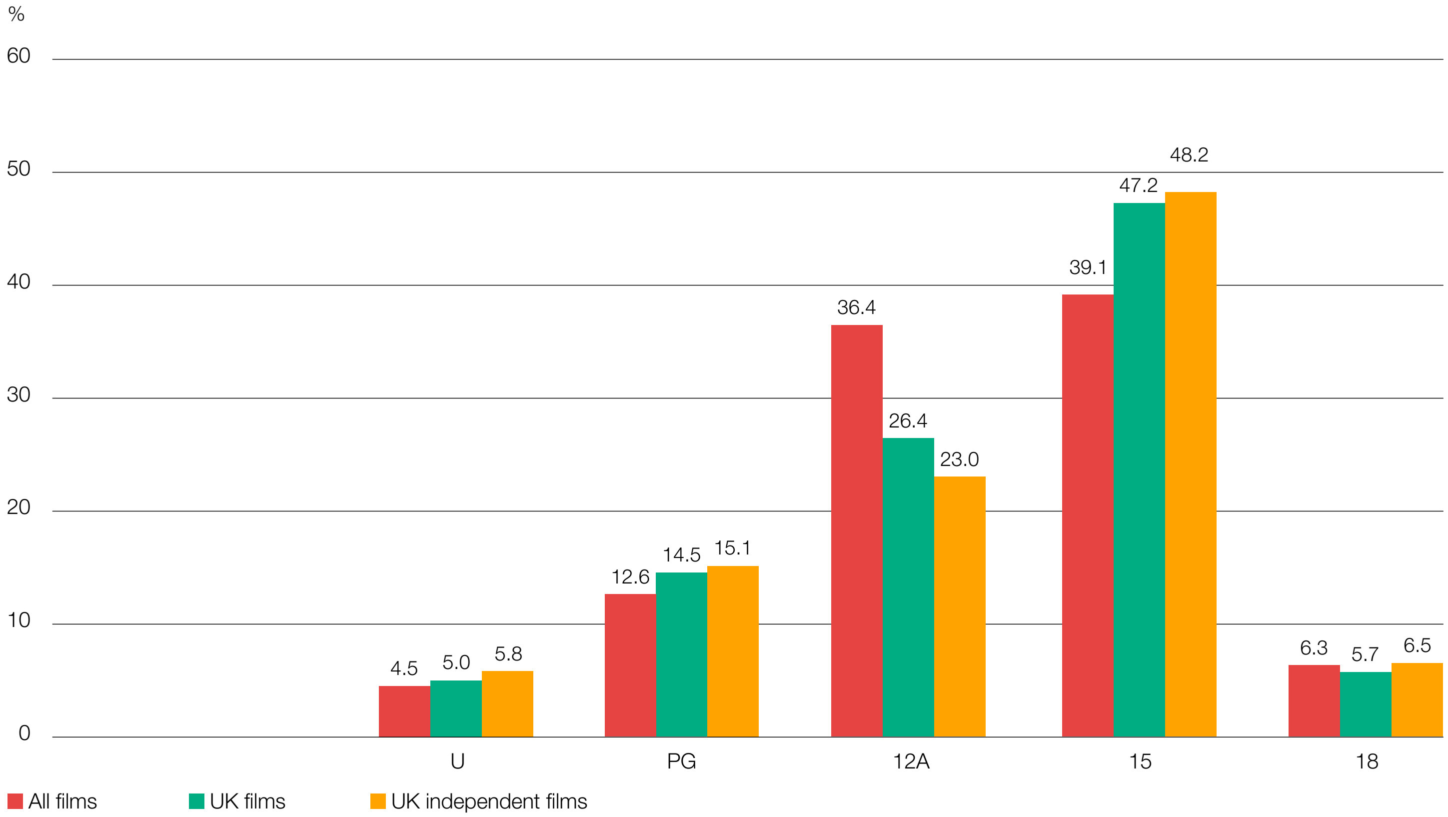
Figures 12 and 13 show a comparison of the share of releases and gross box office by BBFC classification for all films, UK films and UK independent films in 2017. The rankings in terms of percentage of releases by classification were the same across all three categories of film releases, with films with 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' followed by '15' for all films and 'PG' for UK films, whereas for UK independent films the highest earning classification was 'PG' followed by '15'. Films with a '12A' classification generated 44% of the total box office for all films and 52% of the total box office for UK films, compared to 16% for UK independent films. Nine of the 20 highest earning films in 2017 were '12A' titles, including the top grossing film of the year, *Star Wars: The Last Jedi*. (The top earning UK independent film with a '12A' rating was *Viceroy's House* which ranked at 65 in the overall box office chart.)

UK independent films earned a larger proportion of their overall box office from the 'PG' and '15' classifications than the other two categories in 2017. Just under 44% of the total box office for UK independent films was generated by 'PG' films, compared to 14% and 25% for all films and UK films respectively, while 25% of its total box office was generated by '15' films, compared with 22% for all films and 18% for UK films. The top earning independent UK titles in each of these classifications shows how the pattern of box office by rating each year is usually determined by a small number of high grossing releases. The combined grosses of *Paddington 2, Victoria & Abdul* and *Goodbye Christopher Robin* made up almost 96% of the total box office for 'PG' rated independent UK films, while the top three '15' rated independent UK films (*Baby Driver, The Death of Stalin* and *47 Metres Down*) earned 60% of the total box office for '15' rated independent UK films. *T2 Trainspotting* accounted for almost all of the box office takings (over 99%) of '18' rated independent UK films.

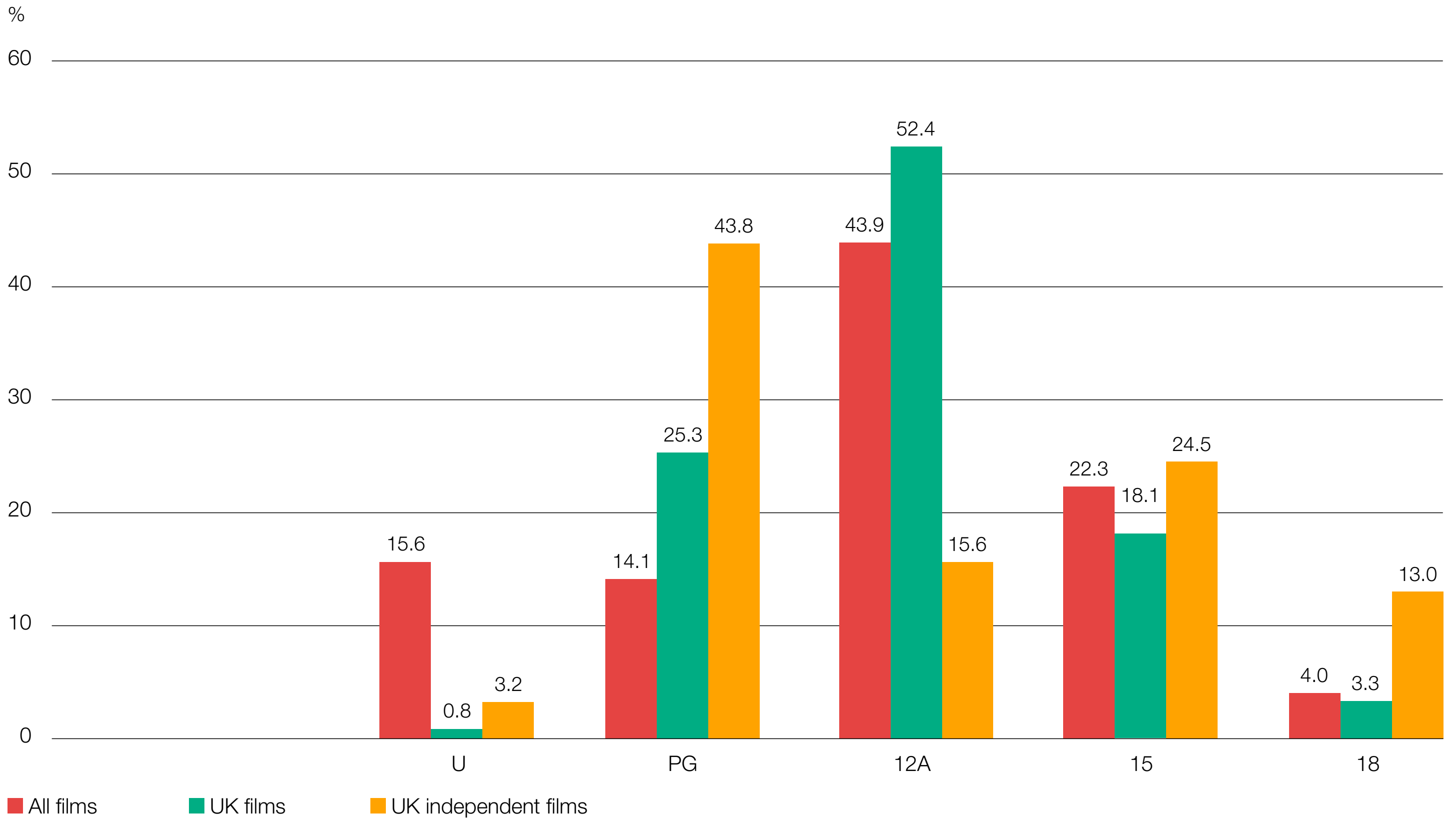
The 'U' classification generated a larger proportion of total box office for all films compared with UK films and UK independent films. This is a fixed trend as 'U' rated releases consistently include a significant number of high earning animated titles produced by the US majors such as, in 2017, *Despicable Me 3, Sing* and *The Boss Baby*.

Figure 12 Percentage of releases by BBFC film classification for all films, UK films and UK independent films, 2017



Source: comScore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2018.

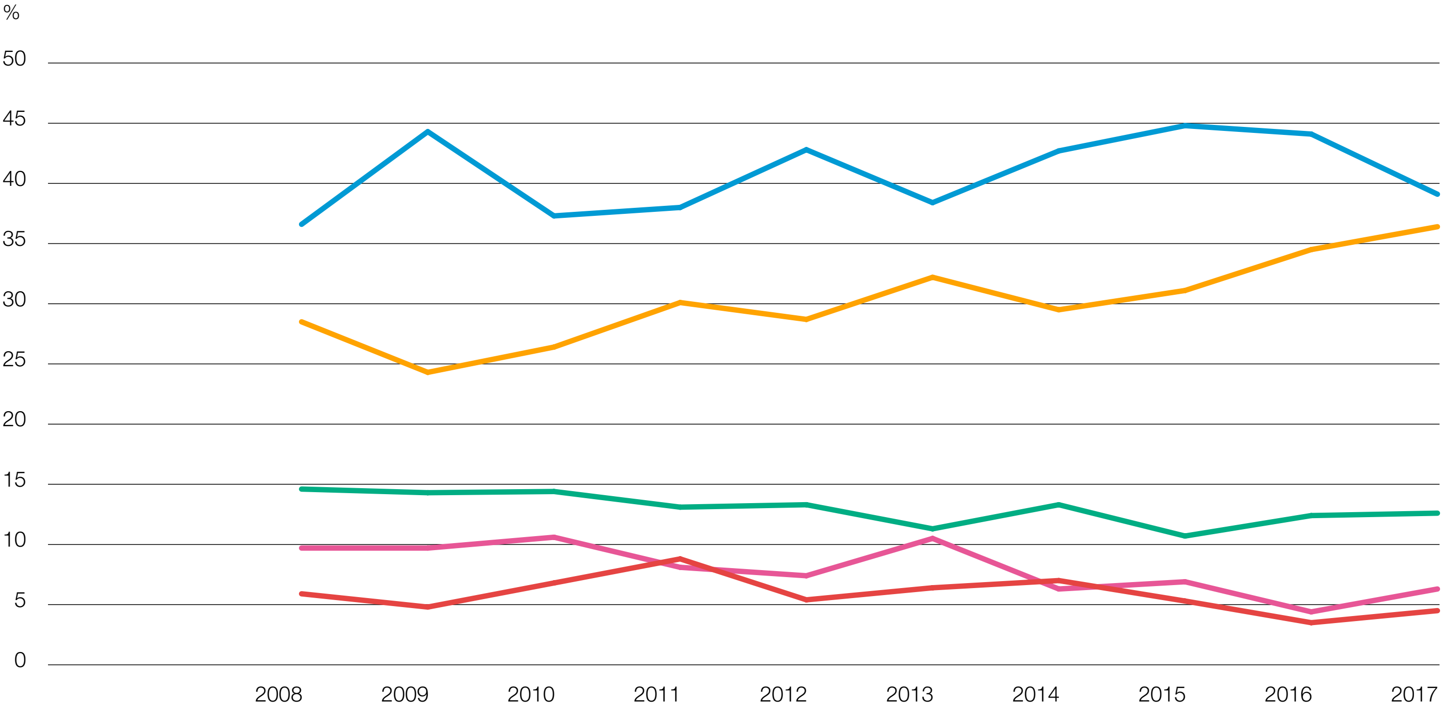
Figure 13 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2017



Source: comScore, BBFC, BFI RSU analysis
Note: Figures as at 18 February 2018.

Figure 14 looks at the pattern of releases by classification between 2008 and 2017. 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. The second and third most common classifications '12A' and 'PG' have together generally accounted for between 40%-45% of releases since 2008, but was as high as 49% in 2017. (Since before 2008 there has been a slow decline in the percentage of 'PG' films being released which has been compensated by a rise in the share of '12A 'films.) The 'U' and '18' classifications have consistently accounted for the smallest percentages of releases over the period. In 2011 and 2014, there were slightly more 'U' films released than '18' films, but in all other years, more '18' films than 'U' films have been released.

Figure 14 Percentage of releases in the UK and Republic of Ireland by film classification, 2008-2017



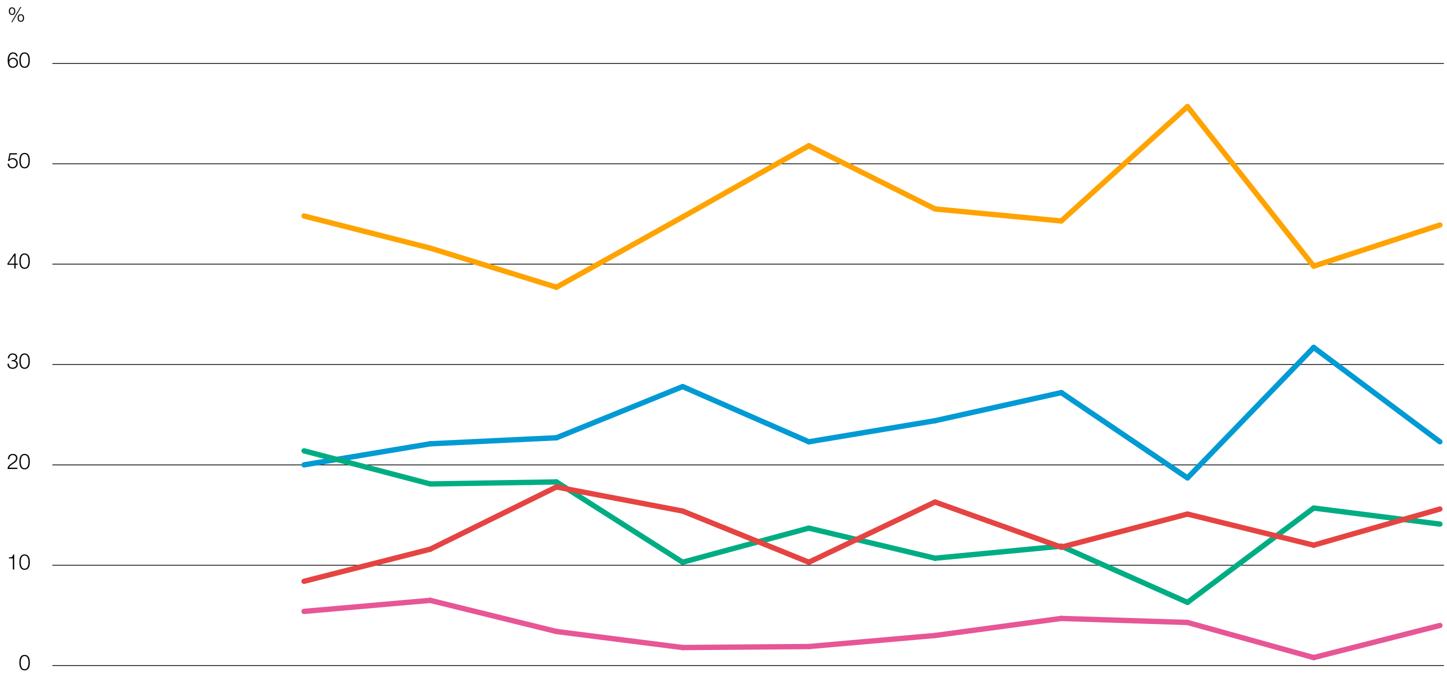
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
U	5.9	4.8	6.8	8.8	5.4	6.4	7.0	5.3	3.5	4.5
PG	14.6	14.3	14.4	13.1	13.3	11.3	13.3	10.7	12.4	12.6
12A	28.5	24.3	26.4	30.1	28.7	32.2	29.5	31.1	34.5	36.4
15	36.6	44.3	37.3	38.0	42.8	38.4	42.7	44.8	44.1	39.1
18	9.7	9.7	10.6	8.1	7.4	10.5	6.3	6.9	4.4	6.3

Source: comScore, BBFC, BFI RSU analysis

Note: Figures as at 18 February 2018.

The annual shares of box office by film classification have varied over the period as demonstrated in Figure 15. 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 2008, the '15' classification has been the second highest earning rating (although in the previous decade it had regularly swapped places with the 'PG' rating for this position). Since 2010 the 'PG' classification has been in competition with the 'U' classification for third and fourth place. The smaller number of releases associated with these two classifications (this is also true of the '18' classification) means their shares of the box office are more susceptible to the effects of a few high earning titles.

Figure 15 Percentage of gross box office of releases in the UK and Republic of Ireland by film classification, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
U	8.4	11.6	17.8	15.4	10.3	16.3	11.8	15.1	12.0	15.6
PG	21.4	18.1	18.3	10.3	13.7	10.7	11.9	6.3	15.7	14.1
12A	44.8	41.6	37.7	44.7	51.8	45.5	44.3	55.7	39.8	43.9
15	20.0	22.1	22.7	27.8	22.3	24.4	27.2	18.7	31.7	22.3
18	5.4	6.5	3.4	1.8	1.9	3.0	4.7	4.3	0.8	4.0

Source: comScore, BBFC, BFI RSU analysis

Note: Figures as at 18 February 2018.

UK FILMS AND BRITISH TALENT WORLDWIDE

FACTS IN FOCUS

WORLDWIDE BOX OFFICE IN 2017

21% of the global theatrical market

$8.1 billion UK qualifying films

2% of the global theatrical market

$783 million Independent UK films

HIGHEST EARNING UK FILM WORLDWIDE IN 2017

Beauty and the Beast $1.2bn

HIGHEST EARNING UK INDEPENDENT FILM WORLDWIDE IN 2017

Baby Driver $204m

INDEPENDENT UK FILMS' BOX OFFICE SHARE

Europe **2.4%**

USA and Canada **2.7%**

New Zealand **7.5%**

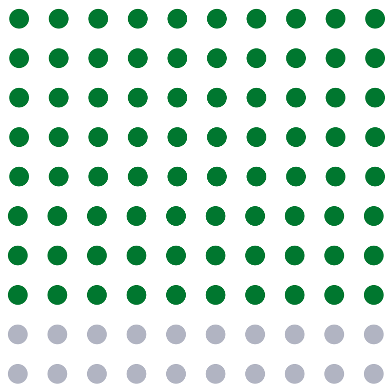
14% UK directors were behind **28** of the **200** highest earning films since 2001

UK STORY MATERIAL

200 top global box office successes 2001-2017

34 films are based on stories and characters created by UK writers. Together they have earned $27 billion (£19 billion) at the worldwide box office

BRITISH TALENT



British acting talent has played lead or supporting roles in **80%** of live action titles in the top 200 films since 2001

UK films and talent won **33** major film awards in 2017/18, including **six Oscars®** and **15 BAFTAs**

UK FILMS AND BRITISH TALENT WORLDWIDE

UK FILMS AT THE GLOBAL BOX OFFICE

UK qualifying films earned a combined worldwide gross of $8.1 billion in 2017, a 21% share of the global box office, which hit a new record of $39.4 billion (Table 1). The worldwide gross achieved by UK films is second only to the total achieved in 2015 when British titles generated almost a quarter of global theatrical revenues.

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 18.8% of the worldwide box office in 2017, with earnings of $7.3 billion. This too was second only to a record gross ($8.4 billion) achieved in 2015. UK independent films earned 2.1% of global revenues in 2017 with worldwide earnings of $826 million, up from $475 million in 2016, but only the sixth highest share since our records began. These global market shares include the box office takings in the UK and Republic of Ireland release territory (where UK studio-backed films had a 27.8% share of the box office and UK independent films had 9.6%).

Table 1 UK films global market share, 2002-2017

Year	UK films worldwide gross (US$ billion)	Global theatrical market (US$ billion)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
2002	1.8	19.6	9.2	7.7	1.5
2003	1.4	21.1	6.7	5.3	1.4
2004	2.9	23.3	12.4	10.7	1.7
2005	3.6	22.7	15.8	13.6	2.2
2006	2.2	24.3	9.0	7.9	1.3
2007	3.3	26.5	12.5	10.5	1.9
2008	4.2	28.2	14.9	13.1	1.8
2009	2.0	29.5	6.8	4.4	2.4
2010	4.5	31.7	14.2	12.6	1.6
2011	5.6	33.3	16.8	14.1	2.8
2012	5.3	34.9	15.2	13.3	1.8
2013	4.1	35.5	11.5	9.8	1.6
2014	4.7	36.1	13.0	9.7	3.2
2015	9.4	38.2	24.6	21.8	2.8
2016	6.5	37.6	17.3	16.0	1.3
2017	8.1	39.4	20.9	18.8	2.1

Source: BFI, comScore, IHS

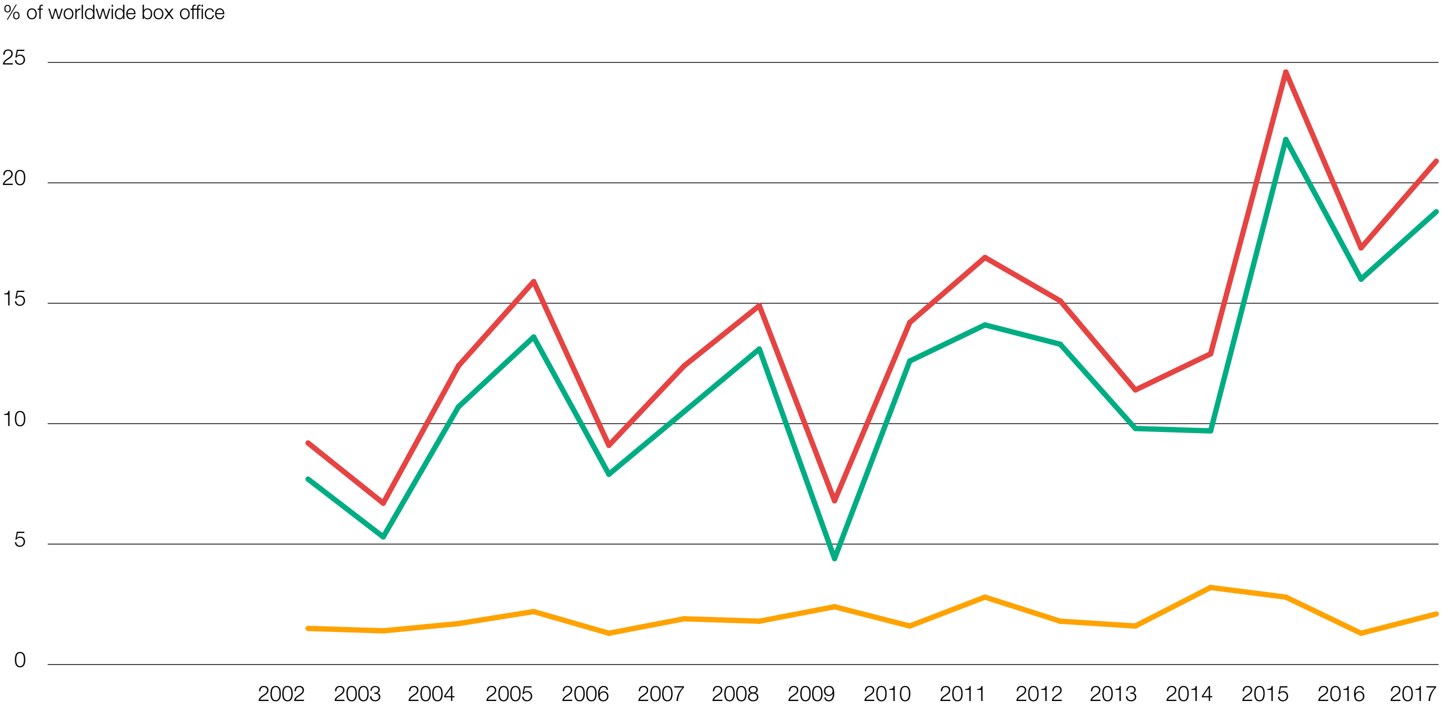
Notes:

Data updated since publication of the 2017 Statistical Yearbook; global theatrical revenues for several years have been revised down, most notably 2016, which was reported in the previous edition as being worth $39.6 billion.

* '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.

As Figure 1 shows, the market share for UK studio-backed films fluctuates significantly from year to year and is highly dependent on the performance of a small number of titles. The peak (22%) achieved in 2015 was propelled by the success of *Star Wars: The Force Awakens* ($1.9 billion) and *Avengers: Age of Ultron* ($1.4 billion). The global annual market share for UK independent films has been more consistent over the period, generally ranging between 1% and 3%. As with the blockbuster UK studio-backed films, the impact of breakout independent titles on the annual market share is significant. The high point for UK independent films was in 2014 (3.2%) when the top earning releases included *The Imitation Game* ($228 million), *Non-Stop* ($223 million) and *Paddington* ($137 million).

Figure 1 UK films global market share, 2002-2017



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total UK share (%)	9.2	6.7	12.4	15.9	9.1	12.4	14.9	6.8	14.2	16.9	15.1	11.4	12.9	24.6	17.3	20.9
UK studio-backed films share* (%)	7.7	5.3	10.7	13.6	7.9	10.5	13.1	4.4	12.6	14.1	13.3	9.8	9.7	21.8	16.0	18.8
UK independent films share (%)	1.5	1.4	1.7	2.2	1.3	1.9	1.8	2.4	1.6	2.8	1.8	1.6	3.2	2.8	1.3	2.1

Source: BFI RSU

* '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.

As Table 2 shows, the list of the top 10 highest grossing UK qualifying films released at the worldwide box office in 2017 is headed by *Beauty and the Beast* ($1.2 billion) and *Star Wars: The Last Jedi* ($1 billion). As in both 2015 and 2016, no independent UK films feature in the top 10 list. The top earning independent UK film worldwide in 2017, *Baby Driver* ($204 million), fell just outside the top 10 in 12th place.

Table 2 Top 10 UK qualifying films worldwide, 2017

	Title	Country of origin	Worldwide gross (US$ million)
1	Beauty and the Beast	UK/USA	1,152
2	Star Wars: The Last Jedi	UK/USA	1,047
3	Wonder Woman	UK/USA	723
4	Pirates of the Caribbean: Salazar's Revenge*	UK/USA	695
5	Transformers: The Last Knight	UK/USA	537
6	Justice League	UK/USA	501
7	Dunkirk	UK/USA	473
8	The Mummy	UK/USA	344
9	Kingsman: The Golden Circle	UK/USA	335
10	Murder on the Orient Express	UK/USA	254
Total top 10			**6,061**

Source: BFI RSU

Notes:

Worldwide gross includes the UK and Republic of Ireland.

The box office gross is cumulative gross box office up to 18 February 2018 in territories where the film was released in 2017. Box office takings from territories where the film was released in 2016 or 2018 are not included in the total. (*Star Wars: The Last Jedi*, for example, was released in a majority of territories in 2017 but was released in China in 2018.)

* *Pirates of the Caribbean: Salazar's Revenge* was released as *Pirates of the Caribbean: Dead Men Tell No Tales* in a range of territories including the USA and Canada.

The highest grossing UK independent film released in 2017 was *Baby Driver*, which earned $204 million worldwide, followed by *Paddington 2* which grossed $131 million (Table 3). These were the only two UK independent films to earn over $100 million from their release in worldwide territories in 2017; none did so in 2016.

Table 3 Top 10 UK independent films worldwide, 2017

	Title	Country of origin	Worldwide gross (US$ million)
1	Baby Driver	UK/USA#	204
2	Paddington 2*	UK/Fra	131
3	47 Metres Down	UK	63
4	Victoria & Abdul	UK/USA#	54
5	Darkest Hour**	UK/USA#	47
6	T2 Trainspotting	UK/USA#	44
7	Three Billboards Outside Ebbing, Missouri***	UK/USA#	33
8	Loving Vincent	UK/Pol/USA#	28
9	Viceroy's House	UK/Ind	15
10	Their Finest	UK	14
Total top 10			**633**

Source: BFI RSU

Notes:

See notes to Table 2.

* *Paddington 2* was released in a majority of territories including the UK and Republic of Ireland in 2017 but was released in some major territories including the USA and Canada, Russia and Japan in 2018.

** *Darkest Hour* was released in the USA and Canada and China in 2017, but in the remainder of the analysed territories, including the UK and Republic of Ireland, in 2018.

*** *Three Billboards Outside Ebbing, Missouri* was released in the USA/Canada in 2017, but in the remainder of the analysed territories, including the UK and Republic of Ireland, in 2018.

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

UK FILMS IN NORTH AMERICA

As with the share of the global market, the market share for UK films in North America (the USA and Canada) has fluctuated greatly over the last 16 years depending on the performance of a very small number of titles (Table 4). UK films earned $3.2 billion at the box office in North America in 2017, just over 29% of the theatrical market and the highest share since our analysis began. The market share for UK studio-backed titles was 26.4% and for UK independent films was 2.7%.

Table 4 UK market share in North America, 2002-2017

Year	Total UK share %	UK studio-backed films share* %	UK independent films share %
2002	7.2	6.6	0.6
2003	5.7	4.2	1.5
2004	11.0	9.7	1.3
2005	15.8	15.0	0.8
2006	9.2	7.6	1.6
2007	11.8	10.6	1.2
2008	16.3	14.5	1.8
2009	6.6	5.5	1.1
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

Source: comScore, BFI RSU analysis

* '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.

With box office earnings of $606 million, *Star Wars: The Last Jedi* was the top performing UK qualifying film in the USA and Canada in 2017 (Table 5). This was the third consecutive year that a film from the Star Wars franchise has topped the chart. The next highest earning UK film was *Beauty and the Beast* with a gross of $504 million. There were seven independent UK films in the top 20, up from three in 2016. The top performing UK independent title was *Baby Driver* with $108 million.

Table 5 Top 20 UK films at the North American box office (including co-productions), 2017

	Title	Country of origin	Box office gross (US$ million)	US distributor
1	Star Wars: The Last Jedi	UK/USA	605.5	Walt Disney
2	Beauty and the Beast	UK/USA	504.0	Walt Disney
3	Wonder Woman	UK/USA	412.6	Warner Bros
4	Justice League	UK/USA	227.7	Warner Bros
5	Dunkirk	UK/USA	188.4	Warner Bros
6	Pirates of the Caribbean: Salazar's Revenge*	UK/USA	172.6	Walt Disney
7	Transformers: The Last Knight	UK/USA	130.2	Paramount
8	Baby Driver	UK/USA#	107.8	Sony Pictures
9	Murder on the Orient Express	UK/USA	102.3	20th Century Fox
10	Kingsman: The Golden Circle	UK/USA	100.2	20th Century Fox
11	The Mummy	UK/USA	80.2	Universal
12	The Hitman's Bodyguard	UK/USA	75.5	Lionsgate
13	Alien: Covenant	UK/USA	74.3	20th Century Fox
14	47 Metres Down	UK	44.3	Entertainment Studios
15	Darkest Hour	UK/USA#	41.5	Focus Features
16	King Arthur: Legend of the Sword	UK/USA	39.2	Warner Bros
17	The Foreigner	UK/USA/Chn#	34.4	STX Entertainment
18	Geostorm	UK/USA#	33.7	Warner Bros
19	Three Billboards Outside Ebbing, Missouri	UK/USA#	32.7	Fox Searchlight
20	Life	UK/USA	30.2	Sony Pictures

Source: comScore, BFI RSU analysis

Notes:

Table lists the gross box office for films released in the USA and Canada in 2017 and includes 2018 earnings up to 18 February 2018.

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

* *Pirates of the Caribbean: Salazar's Revenge* was released as *Pirates of the Caribbean: Dead Men Tell No Tales* in the USA and Canada.

UK FILMS IN EUROPE

Outside the UK and Republic of Ireland, the market shares for UK films in major European territories, including Russia, ranged from a high of just over 27% in the Netherlands to 18% in France (Table 6). The largest share for UK independent films was also recorded in the Netherlands (3.9%) where *Baby Driver* was the top independent title. The next two most popular territories in terms of market share for UK independent films were Portugal (3.4%) where *Baby Driver* was also the top UK independent release and Germany (3%) where *Paddington 2* was the top independent film. Overall in the selected European territories, UK independent films generated an average of 2.4% of box office revenues, up from 1.5% in 2016.

Table 6 UK market share in selected European territories, 2017

Territory	Box office for UK films ($ million)	Total UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top independent UK film
Austria	22.2	19.4	17.4	2.0	Baby Driver
France	255.7	18.0	15.6	2.4	Paddington 2
Germany	317.2	26.0	23.0	3.0	Paddington 2
Italy	104.5	21.3	19.0	2.3	T2 Trainspotting
Netherlands	64.7	27.3	23.4	3.9	Baby Driver
Portugal	20.9	24.3	20.9	3.4	Baby Driver
Russia	240.0	24.2	22.7	1.5	Baby Driver
Spain	114.5	21.6	19.3	2.3	Baby Driver

Source: comScore, BFI RSU analysis

* '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.

In previous editions of the Yearbook we have reported admissions. In 2017, France had a total of 35 million admissions for UK films.

The most popular UK film in European Union (EU) countries (other than the UK, Republic of Ireland and Malta) in 2017 was *Beauty and the Beast* with just under 19.9 million admissions followed by *Star Wars: The Last Jedi* with 19.5 million (Table 7). *Paddington 2* recorded the greatest number of admissions for an independent UK film in the EU with over 4 million ticket sales. Six of the top 20 titles were UK independent films, two more than in 2016.

Table 7 Top 20 UK films in other EU countries, 2017

	Title	Country of origin	EU admissions
1	Beauty and the Beast	UK/USA	19,884,156
2	Star Wars: The Last Jedi	UK/USA	19,447,002
3	Pirates of the Caribbean: Salazar's Revenge	UK/USA	16,911,020
4	Dunkirk	UK/USA	9,543,155
5	Murder on the Orient Express	UK/USA	7,423,698
6	Wonder Woman	UK/USA/HK/Chn	6,364,097
7	Justice League	UK/USA	6,108,731
8	Transformers: The Last Knight	UK/USA/Chn/Can	5,691,867
9	Kingsman: The Golden Circle	UK/USA	5,304,883
10	Paddington 2	UK/Fra	4,032,187
11	Alien: Covenant	UK/USA	3,945,072
12	King Arthur: Legend of the Sword	UK/USA	3,418,642
13	Baby Driver	UK/USA#	3,134,421
14	The Hitman's Bodyguard	UK/Nld/USA	2,769,123
15	The Snowman	UK/Swe/Nor	2,304,105
16	Life	UK/USA	2,048,633
17	Victoria & Abdul	UK/USA#	1,783,915
18	T2 Trainspotting	UK/USA#	1,260,102
19	Loving Vincent	UK/Pol/USA#	910,826
20	Suburbicon	UK/USA#	661,306

Source: European Audiovisual Observatory Lumière Database

Notes:

Data based on admissions from EU countries (excluding the UK, Republic of Ireland and Malta) in the 2017 calendar year.

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

Image: *Baby Driver* ©2017 TriStar Pictures, Inc. and MRC II Distribution Company L.P. All Rights Reserved. Courtesy of Sony Pictures

The most popular UK films in the major European territories outside the EU were *Pirates of the Caribbean: Salazar's Revenge* (top film overall in Russia and top UK film in Turkey) and *Star Wars: The Last Jedi* (top UK film in Switzerland, Iceland and Norway). *Paddington 2* was the top earning UK independent film in Switzerland and Norway while in Iceland it was *Baby Driver.*

UK FILMS IN LATIN AMERICA

UK films earned between 11% and 28% of the box office in the Latin American territories for which data are available (Table 8). *Assassin's Creed* was the highest performing UK qualifying film in those territories with combined takings of $89 million and *Justice League* was second with $54 million. The market share for UK independent films (excluding Argentina and Venezuela where no UK independent films were released) ranged from 0.1% in Colombia to 0.8% in Brazil. The average across the four territories with UK independent film releases was 0.4% (the same as in 2016).

Table 8 UK market share in selected Latin American territories, 2017

Territory	Box office for UK films (US$ million)	Total UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
Argentina	12.5	11.1	11.1	-	-
Brazil	308.1	28.6	27.8	0.8	Baby Driver
Chile	2.7	12.8	12.6	0.2	The Infiltrator
Colombia	8.4	14.6	14.5	0.1	Anthropoid
Mexico	19.6	16.7	16.1	0.6	Florence Foster Jenkins**
Venezuela	54.2	12.1	12.1	-	-

Source: comScore, BFI RSU analysis
* '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.
** *Florence Foster Jenkins* was released in the other territories in this table in 2016; it was the top performing UK independent film in Argentina in that year.

UK FILMS IN ASIA

UK films earned $2.4 billion across the six selected Asian territories in 2017, over 60% of which ($1.4 billion) was generated in China. *Transformers: The Last Knight* ($297 million) was the top performing UK qualifying film across the combined territories, and was the top UK film in both China (where it earned $239 million) and Malaysia. *Beauty and the Beast* was the highest grossing film overall in both Hong Kong and Japan as well as being the top UK title in South Korea, while *Wonder Woman* was the most popular UK title in Singapore. South Korea had the lowest share for UK films (16.9%) across the selected territories, while Japan had the lowest share for UK independent titles (0.8%). Two different UK independent films were the highest earners across the six territories – *Paddington 2* and *Baby Driver*.

Table 9 UK market share in selected Asian territories, 2017

Territory	Box office for UK films (US$ million)	Total UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
China	1,458.4	17.4	16.4	1.0	Paddington 2
Hong Kong	67.4	27.2	25.4	1.8	Paddington 2
Japan	424.3	21.0	20.2	0.8	Baby Driver
Malaysia	72.4	24.5	22.8	1.7	Baby Driver
Singapore	49.3	32.1	30.7	1.4	Baby Driver
South Korea	302.8	16.9	15.9	1.0	Baby Driver

Source: comScore, BFI RSU analysis
* '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.

UK FILMS IN AUSTRALASIA

The two most popular films in both Australia and New Zealand in 2017 where UK qualifying titles: *Star Wars: The Last Jedi* was the highest grossing film in both territories followed by *Beauty and the Beast*. The top grossing UK independent film differed, however, with *Baby Driver* the most popular title in Australia and *Paddington 2* the most popular title in New Zealand (Table 10).

Table 10 UK market share in Australia and New Zealand, 2017

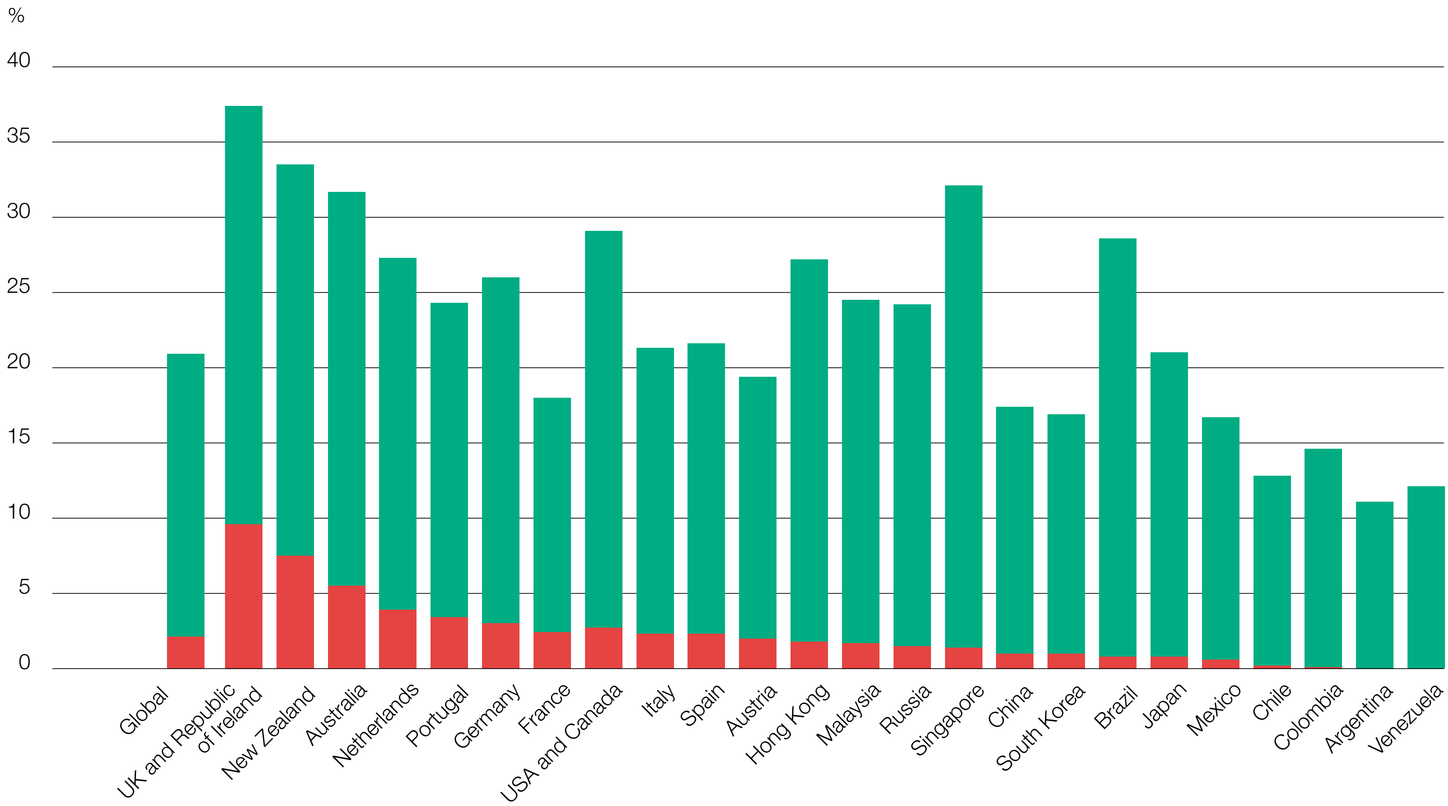
Territory	Box office for UK films (US$ million)	Total UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
Australia	327.9	31.7	26.2	5.5	Baby Driver
New Zealand	48.6	33.5	26.0	7.5	Paddington 2

Source: comScore, BFI RSU analysis

* '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.

Figure 2 shows the market share of UK films for the territories shown in Tables 4, 6 and 8-10. The share for the UK and Republic of Ireland and the overall global share are included to provide a comparison. The territories are listed in order of market share for UK independent films. After the UK and Republic of Ireland, New Zealand and Australia had the second and third highest market shares for independent UK films worldwide at 7.5% and 5.5% respectively.

Figure 2 UK market share in 24 territories, 2017 (in order of market share of UK independent films)



	Global	UK and Republic of Ireland	New Zealand	Australia	Netherlands	Portugal	Germany	France	USA and Canada	Italy	Spain	Austria	Hong Kong	Malaysia	Russia	Singapore	China	South Korea	Brazil	Japan	Mexico	Chile	Colombia	Argentina	Venezuela
UK independent	**2.1**	9.6	7.5	5.5	3.9	3.4	3.0	2.4	2.7	2.3	2.3	2.0	1.8	1.7	1.5	1.4	1.0	1.0	0.8	0.8	0.6	0.2	0.1	-	-
UK studio-backed*	**18.8**	27.8	26.0	26.2	23.4	20.9	23.0	15.6	26.4	19.0	19.3	17.4	25.4	22.8	22.7	30.7	16.4	15.9	27.8	20.2	16.1	12.6	14.5	11.1	12.1
Total UK share	**20.9**	37.4	33.5	31.7	27.3	24.3	26.0	18.0	29.1	21.3	21.6	19.4	27.2	24.5	24.2	32.1	17.4	16.9	28.6	21.0	16.7	12.8	14.6	11.1	12.1

Source: comScore, BFI RSU analysis

Notes:

Figures may not sum to total due to rounding.

* '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.

UK TALENT AND THE GLOBAL BOX OFFICE

Characters and stories created by UK authors consistently enthral film audiences around the world, while British film directors and actors have made a huge impact on films internationally. These talents play an important role in projecting the UK's national identity – and creative abilities – across the globe.

UK SOURCE MATERIAL

The global box office performance of UK films and foreign productions which draw on UK source material is a good indicator of the international impact and exposure of British culture. Of the top 200 grossing films released worldwide between 2001 and 2017, 34 films are based on stories and characters created by UK writers, and collectively these films have earned $27 billion (£19 billion at the average exchange rate) at the global box office. The 34 films include one title released in 2017, *Dunkirk*, which was written (and directed) by Christopher Nolan. Forty-nine of the top 200 titles are UK qualifying films.

Novels by British writers have provided the source material for three of the top 20 grossing films worldwide since 2001: *Harry Potter and the Deathly Hallows: Part 2*, *The Lord of the Rings: The Return of the King* and *Skyfall* (Table 11). Also appearing in the top 20 are *Captain America: Civil War* and *The Dark Knight Rises* which feature superhero characters created respectively by Americans Joe Simon and Bob Kane, but the story for *Captain America: Civil War* was based on a series of comic books penned by the British writer Mark Millar, and *The Dark Knight Rises* was written by Christopher Nolan.

Table 11 Top 20 grossing films worldwide, 2001-2017

Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK source material (writer)
1	Avatar	USA	2,790	20th Century Fox	
2	Star Wars: The Force Awakens	UK/USA	2,068	Walt Disney	
3	Jurassic World	USA	1,672	Universal	
4	Marvel Avengers Assemble	USA	1,520	Walt Disney	
5	Fast & Furious 7	USA	1,519	Universal	
6	Avengers: Age of Ultron	UK/USA	1,405	Walt Disney	
7	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,342	Warner Bros	Novel by JK Rowling
8	Star Wars: The Last Jedi	UK/USA	1,333	Walt Disney	
9	Frozen	USA	1,277	Walt Disney	
10	Beauty and the Beast	UK/USA	1,264	Walt Disney	
11	The Fate of the Furious	USA	1,238	Universal	
12	Iron Man 3	USA/Chn	1,216	Paramount	
13	Minions	USA/Fra	1,167	Universal	
14	Captain America: Civil War	USA	1,154	Walt Disney	
15	Transformers: Dark of the Moon	USA	1,142	Paramount	
16	The Lord of The Rings: The Return of The King	USA/NZ	1,130	New Line	Novel by JRR Tolkien
17	Skyfall	UK/USA	1,109	MGM/Columbia/Sony	Based on novels by Ian Fleming
18	Transformers: Age of Extinction	USA/Chn	1,104	Paramount	
19	The Dark Knight Rises	UK/USA	1,085	Warner Bros	
20	Toy Story 3	USA	1,067	Walt Disney	

Source: BFI RSU, comScore

Looking just at films based on UK story material, the top 20 grossing films based on stories or characters created by UK writers during the period are listed in Table 12. Nineteen are adaptations of novels or other books by UK authors and one is from an original screenplay. Works by JK Rowling are the source material for nine titles in the top 20 (all eight of the Harry Potter films and *Fantastic Beasts and Where to Find Them*), while six titles are based on the writings of JRR Tolkien (the Lord of the Rings and Hobbit trilogies). There are no entries from 2017.

Table 12 Top 20 grossing films worldwide based on stories and characters created by UK writers, 2001-2017

Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK source material (writer)
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,342	Warner Bros	Novel by JK Rowling
2	The Lord of the Rings: The Return of The King	UK/USA	1,130	New Line	Novel by JRR Tolkien
3	Skyfall	UK/USA	1,109	MGM/Columbia/Sony	Based on the novels by Ian Fleming
4	Alice in Wonderland	USA	1,025	Walt Disney	Novel by Lewis Carroll
5	The Hobbit: An Unexpected Journey	USA/NZ	1,021	Warner Bros	Novel by JRR Tolkien
6	Harry Potter and the Philosopher's Stone	UK/USA	975	Warner Bros	Novel by JK Rowling
7	The Jungle Book	UK/USA	967	Walt Disney	Novel by Rudyard Kipling
8	The Hobbit: The Desolation of Smaug	USA/NZ	961	Warner Bros	Novel by JRR Tolkien
9	Harry Potter and the Deathly Hallows: Part 1	UK/USA	960	Warner Bros	Novel by JK Rowling
10	The Hobbit: The Battle of the Five Armies	USA/NZ	956	Warner Bros	Novel by JRR Tolkien
11	Harry Potter and the Order of the Phoenix	UK/USA	940	Warner Bros	Novel by JK Rowling
12	Harry Potter and the Half Blood Prince	UK/USA	934	Warner Bros	Novel by JK Rowling
13	The Lord of the Rings: The Two Towers	USA/NZ	929	New Line	Novel by JRR Tolkien
14	Harry Potter and the Goblet of Fire	UK/USA	897	Warner Bros	Novel by JK Rowling
15	SPECTRE	UK/USA	881	MGM/Columbia/Sony	Based on the novels by Ian Fleming
16	Harry Potter and the Chamber of Secrets	UK/USA	878	Warner Bros	Novel by JK Rowling
17	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	873	New Line	Novel by JRR Tolkien
18	Inception	USA	828	Warner Bros	Original screenplay by Jonathan and Christopher Nolan
19	Fantastic Beasts and Where to Find Them	UK/USA	813	Warner Bros	Based on the book by JK Rowling
20	Harry Potter and the Prisoner of Azkaban	UK/USA	797	Warner Bros	Novel by JK Rowling

Source: BFI RSU, comScore

Of the 34 films from the top 200 based on stories and characters created by UK writers, 85% (29 films) were adapted from the work of current and classic authors such as Ian Fleming, Rudyard Kipling, CS Lewis, JK Rowling and JRR Tolkien (Figure 3). Four films are based on original screenplays and one is based on a musical.

Figure 3 Origin of UK source material in the top 200 films at the worldwide box office, 2001-2017

Source material	%
Novel	85.3
Original screenplay	11.8
Musical	2.9

Source: BFI RSU

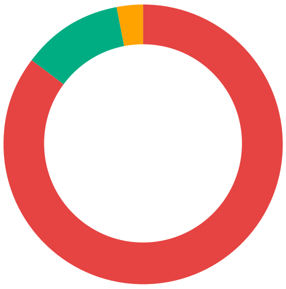


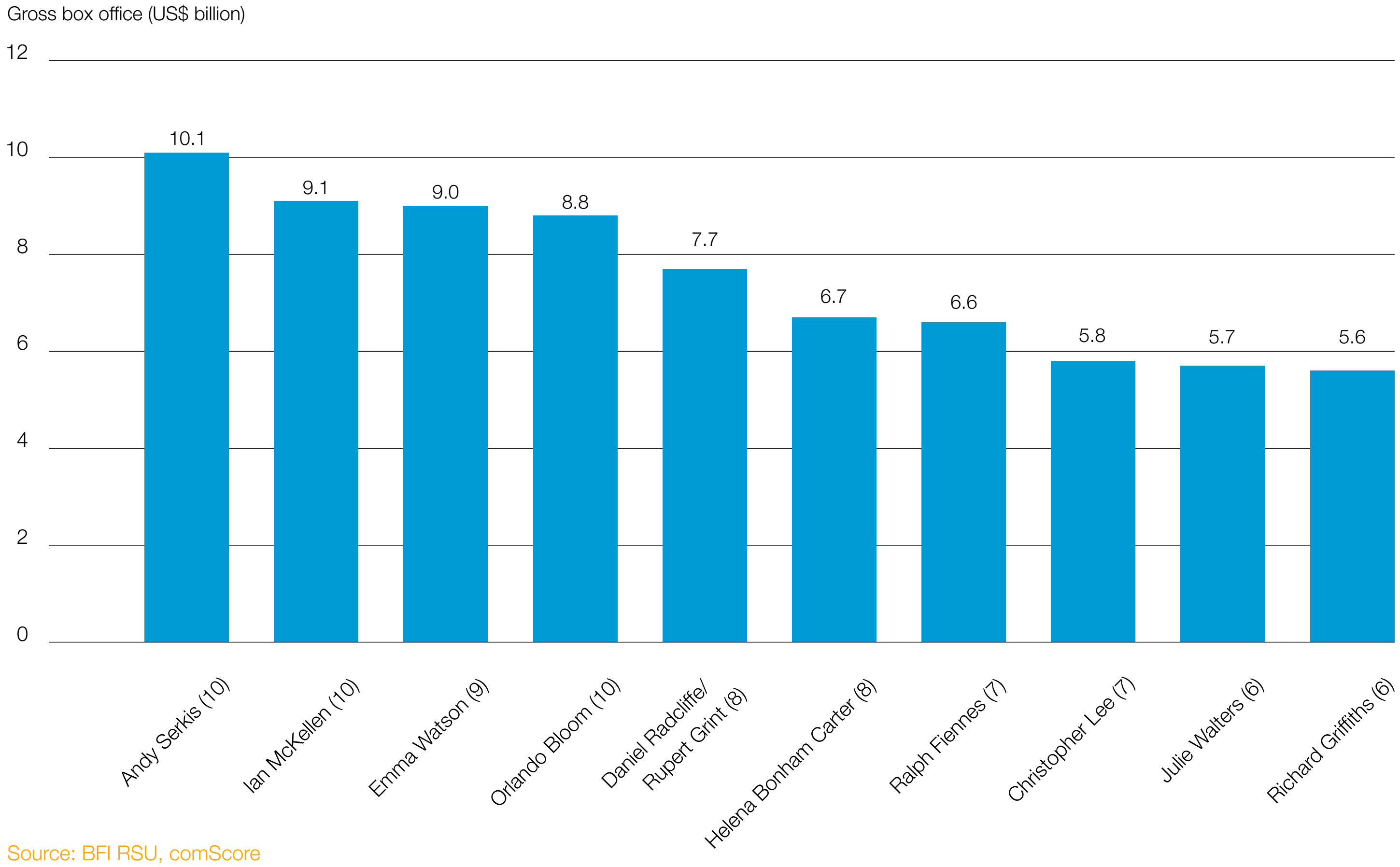
Image: *Darkest Hour* ©2017 Focus Features LLC. All Rights Reserved. Courtesy of Universal Studios Licensing LLC

UK ACTORS

Over 60% (128) of the top 200 films at the global box office since 2001 have featured British actors in either lead/title roles (53) or in the supporting cast (70). If animated titles are removed (47 titles), then British acting talent has played lead or supporting roles in 80% of the top live action films of the last 17 years. The global prominence of UK acting talent is reflected in Figure 4, which shows the top 11 British actors based on appearances in the top 200 films and ranked by total box office gross. (The chart shows 10 entries, but includes 11 actors as Daniel Radcliffe and Rupert Grint both feature for the same eight films of the Harry Potter series and thus are shown as one entry). The Harry Potter films feature heavily in this chart.

At the top of the list is Andy Serkis, whose ground-breaking motion capture performances have contributed to a range of successful franchises including the Lord of the Rings, the Hobbit, Planet of the Apes and Star Wars films as well as the most recent remake of the movie classic *King Kong*. In second place is Ian McKellen who has appeared in 10 of the top 200 films, including three X-Men films and the Lord of the Rings and Hobbit trilogies. Emma Watson is third thanks to her starring role in the eight Harry Potter titles and 2017's *Beauty and the Beast*, followed by Orlando Bloom who has appeared in five Tolkien adaptations and four Pirates of the Caribbean films. There are two other female actors in the list: Helena Bonham Carter, who has appeared in eight of the top 200 films, including four Harry Potter films, *The King's Speech, Les Misérables* and *Cinderella*, and Julie Walters, who has appeared in five Harry Potter films and *Mamma Mia!*.

Figure 4 Top 10 UK actors featured in the top 200 films at the worldwide box office, 2001-2017 (number of appearances in brackets)



Source: BFI RSU, comScore

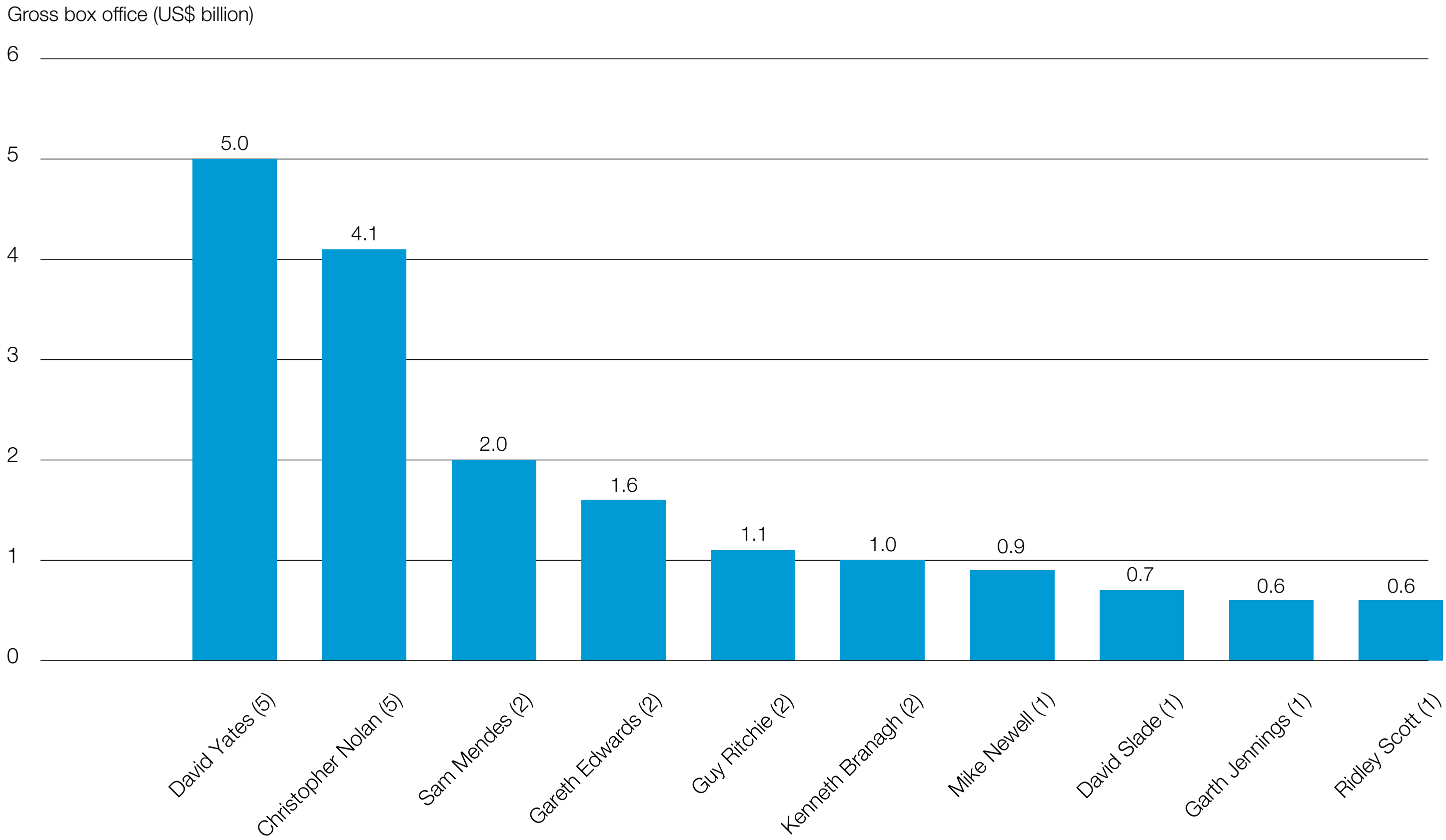
Note: Includes actors who have made appearances in the top 200 films, either in lead/title role or supporting role, not including voice-only roles.

UK DIRECTORS

Twenty-eight of the 200 highest grossing films at the global box office between 2001 and 2017 were helmed by British directors (Table 13). The top 10 UK directors in terms of cumulative earnings for films in the top 200 are listed in Figure 5. David Yates remains the most commercially successful British director in recent years, with total top 200 box office takings of $5 billion from four Harry Potter films and the spin-off title *Fantastic Beasts and Where to Find Them*. Christopher Nolan is second with $4.1 billion from five top 200 titles: two Batman films, *Inception, Interstellar* and the 2017 release *Dunkirk*. In third place is *Skyfall* and *SPECTRE* director Sam Mendes ($2 billion) followed by Gareth Edwards with box office earnings of $1.6 billion from *Rogue One: A Star Wars Story* and *Godzilla*.

Two women feature amongst the British directors of top 200 films: Phyllida Lloyd is in 13th place with a worldwide gross of $606 million for *Mamma Mia*! and Sam Taylor-Johnson is 14th with a gross of $571 million for *Fifty Shades of Grey*. The only independent UK film to feature in the list in recent years had been Tom Hooper's *The King's Speech* ($414 million) but this has fallen to 208th place.

Figure 5 Top 10 UK directors based on top 200 grossing films at the worldwide box office, 2001-2017 (number of films in brackets)



Source: BFI RSU, comScpre

Table 13 UK directors of top 200 films at the worldwide box office, 2001-2017

	Director	Film	Total gross box office (US$ million)
1	David Yates	Harry Potter and the Deathly Hallows: Part 2	4,988
		Harry Potter and the Deathly Hallows: Part 1	
		Harry Potter and the Order of the Phoenix	
		Harry Potter and the Half Blood Prince	
		Fantastic Beasts and Where to Find Them	
2	Christopher Nolan	The Dark Knight Rises	4,120
		The Dark Knight	
		Inception	
		Interstellar	
		Dunkirk	
3	Sam Mendes	Skyfall	1,989
		SPECTRE	
4	Gareth Edwards	Rogue One: A Star Wars Story	1,584
		Godzilla (2014)	
5	Guy Ritchie	Sherlock Holmes: A Game of Shadows	1,071
		Sherlock Holmes	
6	Kenneth Branagh	Cinderella	992
		Thor	
7	Mike Newell	Harry Potter and the Goblet of Fire	897
8	David Slade	The Twilight Saga: Eclipse	698
9	Garth Jennings	Sing	632
10	Ridley Scott	The Martian	631
11	Phyllida Lloyd	Mamma Mia!	606
12	Sam Taylor-Johnson	Fifty Shades of Grey	571
13	Rupert Wyatt	Rise of the Planet of the Apes	483
14	Paul Greengrass	The Bourne Ultimatum	443
15	Tom Hooper	Les Misérables	442
16	Duncan Jones	Warcraft	434

Source: BFI RSU, comScore

INTERNATIONAL AWARDS FOR UK FILMS AND TALENT

Awards and nominations are important for raising the critical reputation and international profile of UK film. This section presents the prizes won by British talent and UK films at the major international film festivals and awards ceremonies in the 2017/18 awards cycle. The awards included here were presented at the Sundance, Berlin, Cannes, Venice and Toronto festivals of 2017 and the BAFTA Film Award and Academy Award® ceremonies which took place in 2018.

However, Table 14 also shows the number of awards won in calendar years 2001 to 2017, in order to provide a comparison with previous years. In 2017, UK films and British individuals won 22 awards, representing 12% of the prizes available. The number of awards won is down on 2016, when 29 awards were won, representing 15% of those available. (Awards specific to foreign nationals or films, for example the Toronto Film Festival's award for Best Canadian Film, are not included in the present analysis).

Table 14 Numbers of UK award winners, 2001-2017/18

Year	Number of UK award winners	UK share %
2001	25	14
2002	24	15
2003	22	13
2004	22	13
2005	23	14
2006	25	14
2007	32	15
2008	32	15
2009	36	17
2010	24	12
2011	30	15
2012	23	14
2013	24	13
2014	28	19
2015	24	16
2016	29	15
2017	22	12
Total (to end of 2017)	**453**	
2016/17 awards cycle	*22*	*12*
2017/18 awards cycle	*33*	*18*

Source: BFI

Table 15 lists the awards won by UK films and British talent at the major festivals in 2017 and at the 2018 BAFTA Film Awards and Academy Awards®.

British films and filmmakers won prizes at all of the five major festivals in 2017. There were three winners at the Sundance Film Festival: Francis Lee won the directing award (world cinema dramatic) for *God's Own Country*, Daniel Landin won the cinematography award (US cinema dramatic) for *The Yellow Birds*, and Babak Anvari received the Sundance Institute/NHK Award for emerging filmmakers with his latest script *I Came By*. Francis Lee repeated his success at Berlin, winning the Harvey (Männer Readers' Jury Award) for *God's Own Country*, while Sally Potter picked up the German festival's Guild Film Prize. The big UK winner at Cannes was Lynne Ramsay who was awarded the best screenplay prize for *You Were Never Really Here* (which she also directed). The other British winners at Cannes were the actors Anya Taylor-Joy and George MacKay who won the Chopard Trophy for up-and-coming talent. There were two UK prizes at Venice: Charlotte Rampling won the Volpi Cup for her performance in *Hannah* and Martin McDonagh won the best screenplay award for *Three Billboards Outside Ebbing, Missouri* (which he also directed). *Three Billboards Outside Ebbing, Missouri* was one of two British films to pick up prizes at Toronto, with a win in the People's Choice Award category, while Clio Barnard's *Dark River* was awarded a special mention from the Toronto Platform Prize jury.

Three films led the British success at the BAFTAs in 2018 winning seven of a total haul of 15 awards. The big winners on the night were: *Three Billboards Outside Ebbing, Missouri* which won awards for best film, outstanding British film and best original screenplay (Michael McDonagh); *Darkest Hour* which picked up awards for leading actor (Gary Oldman) and makeup and hairstyling; and *Blade Runner 2049* which won in the cinematography and special visual effects categories. The cinematography BAFTA was the fourth win in this category for Roger Deakins, who also won best achievement in cinematography at the Academy Awards®, his first ever Oscar win after 13 previous nominations. This award was one of two for *Blade Runner 2049* at the Academy Awards® which also repeated its BAFTA win in visual effects. Overall, British films and filmmakers won six Oscars® in 2018. *Darkest Hour* matched both its BAFTA wins in the leading actor and makeup and hairstyling categories while *Dunkirk* won the Oscar® for sound editing. (*Dunkirk* picked up two further Academy Awards® – for sound mixing and film editing – but as these were won by non-British nationals they do not appear in the following table.)

Table 15 Awards won by UK film and British talent, 2017/18

Award ceremony/ festival	Award	Recipient	Title
Sundance Film Festival 19-29 January 2017	Directing Award: World Cinema Dramatic	Francis Lee	God's Own Country
	Cinematography Award: US Cinema Dramatic	Daniel Landin	The Yellow Birds
	Sundance Institute/ NHK Award	Babak Anvari	-
Berlin Film Festival 9-19 February 2017	Guild Film Prize	Film Award presented to Sally Potter	The Party
	Harvey (Männer Readers' Jury Award)	Film Award presented to Francis Lee	God's Own Country
Cannes Film Festival 17-28 May 2017	Award for Best Screenplay	Lynne Ramsay	You Were Never Really Here
	Chopard Trophy	Anya Taylor-Joy and George MacKay	-
Venice Film Festival 30 August-9 September 2017	Best Actress (Volpi Cup)	Charlotte Rampling	Hannah
	Best Screenplay	Martin McDonagh	Three Billboards Outside Ebbing, Missouri
	Mimmo Rotella Foundation Award	Michael Caine (with George Clooney and Ai Weiwei)	-
Toronto International Film Festival 7-17 September 2017	Toronto Platform Prize - special mention	Film Award presented to Clio Barnard	Dark River
	People's Choice Award	Film Award presented to Martin McDonagh	Three Billboards Outside Ebbing, Missouri
BAFTA Film Awards 18 February 2018	BAFTA Fellowship	Ridley Scott	-
	Outstanding British contribution to Cinema	National Film and Television School	-
	Best Film	Film Award presented to Graham Broadbent, Martin McDonagh and Peter Czernin	Three Billboards Outside Ebbing, Missouri
	Outstanding British Film	Film Award presented to Graham Broadbent, Martin McDonagh and Peter Czernin	Three Billboards Outside Ebbing, Missouri
	Outstanding Debut by a British writer, director or producer	Rungano Buyoni and Emily Morgan	I Am Not a Witch
	Original Screenplay	Martin McDonagh	Three Billboards Outside Ebbing, Missouri
	Leading Actor	Gary Oldman	Darkest Hour
	Cinematography	Roger Deakins	Blade Runner 2049
	Editing	Jonathan Amos (with Paul Machliss)	Baby Driver
	Makeup and Hairstyling	David Malinovski , Ivana Primorac and Lucy Sibbick (with Kazuhiro Tsuji)	Darkest Hour
	Sound	Alex Gibson (with Richard King, Gregg Landaker, Gary A. Rizzo and Mark Weingarten)	Dunkirk

Table 15 Awards won by UK film and British talent, 2017/18 (continued)

Award ceremony/ festival	Award	Recipient	Title
BAFTA Film Awards 18 February 2018 (continued)	Special Visual Effects	Paul Lambert (with Richard R. Hoover, Gerd Nefzer and John Nelson)	Blade Runner 2049
	British Short Film	Colin O'Toole with Jonas Mortensen	Cowboy Dave
	British Short Animation	Paloma Baeza (with Ser En Low)	Poles Apart
	EE Rising Star Award	Daniel Kaluuya	-
Academy Awards® 4 March 2018	Actor in a Leading Role	Gary Oldman	Darkest Hour
	Cinematography	Roger Deakins	Blade Runner 2049
	Makeup and Hairstyling	David Malinovski and Lucy Sibbick (with Kazuhiro Tsuji)	Darkest Hour
	Short Film (live action)	Film Award presented to Chris Overton and Rachel Shenton	The Silent Child
	Sound Editing	Alex Gibson (with Richard King)	Dunkirk
	Visual Effects	Paul Lambert (with Richard R. Hoover, Gerd Nefzer and John Nelson)	Blade Runner 2049

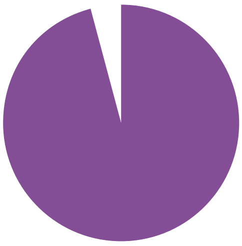
Source: BFI

Note: Award recipients in parentheses are non-UK nationals.

DISTRIBUTION AND EXHIBITION

FACTS IN FOCUS

DISTRIBUTOR REVENUES



The **top 10 distributors** had a **96% share** of the theatrical market in the **UK and Republic of Ireland** in 2017 with **revenues of £1.3 billion**

TOP EARNING DISTRIBUTORS

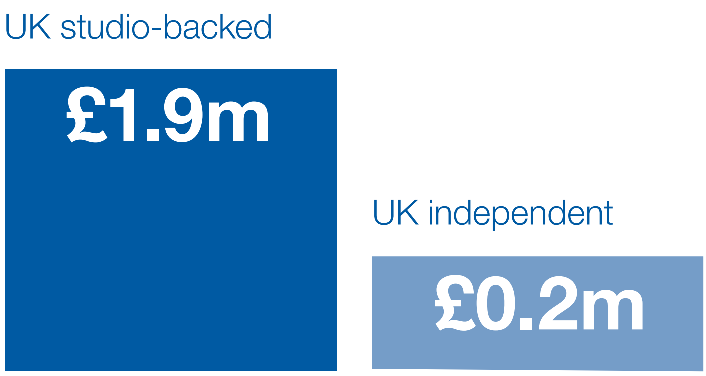
Walt Disney

Overall top earning distributor with theatrical revenues of **£265m**

StudioCanal

Top earning distributor of UK independent films with theatrical revenues of **£45m** from these titles and total revenues of **£57m**

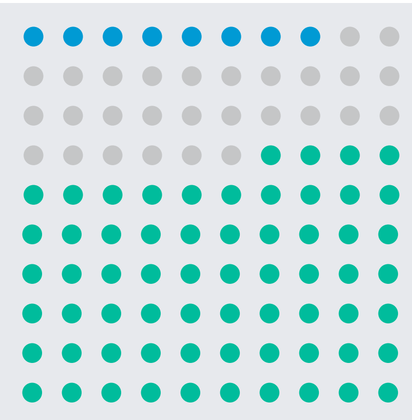
AVERAGE AD SPEND FOR UK FILMS IN 2017



CINEMA TICKETS

The average ticket price at commercial cinemas in **2017** was **£7.49**, up from **£7.30** in **2016**

WIDTH OF RELEASE



In 2017, **8%** of films (63) were released at 500 sites or over, while **64%** of films (484) were released at 50 sites or under

UK CINEMA PROVISION

2016	**766** cinema sites **4,150** screens
2017	**774** cinema sites **4,264** screens

CINEMA OWNERSHIP

38%

64%

At the end of **2017**, the three largest exhibitors owned **38%** of all UK cinemas and **64%** of UK screens

SCREEN DENSITY IN THE UK

6.5 screens per **100,000** people, up from **6.4** in **2016**

DISTRIBUTION AND EXHIBITION

DISTRIBUTORS

The top 10 feature film distributors had a 96% share of the market in 2017 from the release of 284 titles (30% of all films on release). The same 10 distributors achieved a similar share in 2016 from 342 releases (34% of all releases). A further 117 distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2017, compared with 97 companies outside the top 10 in 2016. These distributors handled a total of 665 titles (70% of all releases) but generated only 4% of the total box office.

Table 1 shows box office takings by distributor for all films on release during 2017, and hence includes the box office takings of titles which were released in 2016 but remained in cinemas into 2017. The top earning distributor was Walt Disney, which handled four of the top 20 releases of 2017 including *Star Wars: The Last Jedi, Beauty and the Beast* and *Thor: Ragnarok* as well as some late 2016 releases which continued to generate significant box office in 2017, such as *Moana* and *Rogue One: A Star Wars Story.* The second highest earning distributor was Warner Bros which released three of 2017's top 20 titles including *Dunkirk* and *It*.

Table 1 Distributor share of box office, UK and Republic of Ireland, 2017

Distributor	Market share (%)	Films on release in 2017	Box office gross (£ million)
Walt Disney	19.7	16	265.2
Warner Bros	16.6	30	223.2
Universal	16.0	30	214.6
20th Century Fox	15.1	39	203.1
Sony Pictures	10.3	28	138.5
Lionsgate	6.3	36	84.1
StudioCanal	4.2	52	56.9
Paramount	3.7	13	50.2
eOne Films	2.5	33	33.3
Entertainment	1.7	7	22.3
Sub-total (top 10 distributors)	96.1	284	1,291.5
Others (117 distributors)	3.9	665	52.7
Total	**100.0**	**949**	**1,344.3**

Source: comScore

Notes:

The total number of films on release differs from Table 6 below, as here it includes all films on release in 2017, including titles first released in 2016.

Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2017 to 31 December 2017.

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

Table 2 shows the market share for the top 10 distributors annually over the past 10 years. In 2017, Walt Disney was the UK's leading distributor for the second consecutive year (and the second time in the decade covered in the table). The second highest earning distributor of 2017, Warner Bros, has headed the top 10 chart on three occasions over the period, whilst third placed Universal has topped the chart twice since 2008. The top independent distributor in 2017 was Lionsgate, whose titles included the top 20 film *La La Land.*

The same distributors consistently appear in the top 10. In all years up to 2012, with one exception, the major US studios took the leading places in the list with only six different independent distributors appearing in the top 10 over the period. However, following the consolidation of a number of the independents, this pattern is beginning to change and in 2017 two independents, Lionsgate and StudioCanal, were higher placed than Paramount. StudioCanal also appeared ahead of Paramount in both 2014 and 2015, and ahead of Sony Pictures in 2014, while eOne Films has ranked higher than Paramount and Sony Pictures in 2013, 2014 and 2016.

In the last few years, the share of box office generated by distributors outside the top 10 has ranged from 3.7% in 2014 to 7.8% in 2009.

Table 2 Distributor market share as percentage of box office gross, 2008-2017 (ranked by 2017 market share)

Distributor	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Walt Disney	9.9	12.4	14.0	8.7	10.2	15.2	10.1	20.0	23.2	19.7
Warner Bros	11.0	11.2	18.3	18.2	12.9	17.2	15.9	9.0	15.6	16.6
Universal	18.5	10.5	10.2	11.8	10.7	15.1	11.2	21.6	14.0	16.0
20th Century Fox	9.4	16.6	15.9	12.1	16.1	13.1	21.8	14.9	15.7	15.1
Sony Pictures	12.5	11.3	6.9	7.2	18.0	8.7	6.2	11.8	6.6	10.3
Lionsgate	2.5	2.9	3.5	-	5.7	4.7	5.5	4.0	4.0	6.3
Optimum/StudioCanal[1]	-	-	2.2	3.8	-	2.8	6.7	4.7	1.5	4.2
Paramount	16.9	10.8	14.8	16.3	7.7	7.8	5.8	4.0	5.4	3.7
eOne Films	-	4.9	5.5	5.1	6.7	9.0	8.0	3.9	8.4	2.5
Entertainment	8.0	8.6	2.5	6.7	3.1	1.9	5.2	1.6	1.5	1.7
Momentum[2]	3.5	-	-	4.6	4.3	-	-	-	-	-
Pathé	2.1	2.9	-	-	-	-	-	-	-	-
Top 10 total[3]	94.5	92.2	93.7	94.4	95.4	95.5	96.3	95.5	95.9	96.1
Others	5.5	7.8	6.3	5.6	4.6	4.5	3.7	4.5	4.1	3.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

Notes:

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

[2] Momentum was taken over by eOne Films in January 2014.

[3] 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 2017.

Foreign language films accounted for 46% of releases at the UK box office in 2017, 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: 82 different distributors released foreign language films in 2017. As Table 3 shows, the top 10 distributors associated with these films released 80 (23%) of the total 349 titles. Hindi was the most popular non-English language for releases both in terms of numbers and box office revenues, with 52 titles taking £10.6 million. French and Tamil were jointly the next most popular foreign languages in terms of number of releases, with 35 each, but films in French earned more at the box office with takings of £2.7 million compared with £1.8 million.

Indian film distributor Yash Raj had the largest share of the foreign language box office overall with earnings of £3.2 million from five releases, while StudioCanal released the highest number of non-English language titles (20). StudioCanal does not appear in the table, however, as its earnings from foreign language releases place it outside the top 10. The highest earning foreign language film of the year overall was the Yash Raj release *Tiger Zinda Hai* (in Hindi), while the top earning non-Hindi language title was *Baahubali 2: The Conclusion* (in Tamil), the only film released by Hamsini Entertainment/DCP. The distributor of non-Indian foreign language films with the highest box office share was Curzon Artificial Eye (£3 million), whose titles included *The Handmaiden* (in Korean) and *The Salesman* (in Persian).

The table highlights the growing popularity of Polish language films in the UK: Polish film specialist Phoenix appears in the top 10 for the third consecutive year with earnings of £2 million from seven releases.

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2017 (ranked by box office gross)

Distributor	Number of foreign language films released in 2017	Average widest point of release	Box office gross (£ million)
Yash Raj	5	85	3.2
Curzon Artificial Eye	11	36	3.0
Zee Studios	7	63	2.4
Phoenix	7	127	2.0
20th Century Fox	6	55	1.6
Hamsini Entertainment/DCP	1	80	1.4
B4U Network	13	18	1.2
Thunderbird Releasing	9	36	1.1
Grand Showbiz	17	19	0.9
Reliance Entertainment	4	58	0.9

Source: comScore, BFI RSU analysis

In total, 53 distributors released independent UK films in 2017, generating a combined box office gross of £133 million (10% of the total box office) from 139 releases. The 43 films released by the top 10 distributors of independent UK titles accounted for £127 million, which equates to 95% of the total box office generated by these films (Table 4). StudioCanal had the largest share of box office for UK independent film releases with earnings of £45 million from six films, including the category's highest earning film, *Paddington 2*, while Lionsgate had the highest number of releases (eight), which included titles such as *Their Finest*, *Churchill* and *The Limehouse Golem.*

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2017 (ranked by box office gross)

Distributor	Number of UK independent films released in 2017	Average widest point of release	Box office gross (£ million)
StudioCanal	6	218	45.4
Sony Pictures	4	338	30.5
eOne Films	7	336	13.7
20th Century Fox	4	511	11.1
Universal	1	619	10.1
Lionsgate	8	229	9.2
Picturehouse	3	68	2.0
Altitude	3	85	1.9
STX Entertainment	1	463	1.7
Vertigo	6	94	1.7

Source: comScore, BFI RSU analysis

WIDTH OF RELEASE

Table 5 shows the numbers and percentages of films released in the UK and Republic of Ireland from 2010 to 2017 by widest point of release. The number of films released increased each year between 2010 and 2016, with the majority of the increase being accounted for by films shown at fewer than 50 sites. The total number of releases fell in 2017; again primarily due to the impact of the number of films shown at fewer than 50 sites. Each year, more than one third of releases were shown at fewer than 10 sites.

The number of films released at 500 sites or over has grown over the period, rising from 13 in 2010 to 63 in 2017. In previous editions of the Yearbook this has been the upper limit of our release width categories. However, as a growing number of titles have been released in recent years at 600 sites or over we have included data for this category for the first time; in 2017 there were 29 such releases. Films receiving the very widest releases are typically big budget blockbusters released by the distribution arms of the Hollywood studios. (The widest ever releases in the UK were those of the last three films in the Star Wars franchise which all went out on over 700 sites.) Overall, as a proportion of total releases, the number of films shown at 500 sites or over in 2017 represented 8% of the year's releases compared with 2% in 2010.

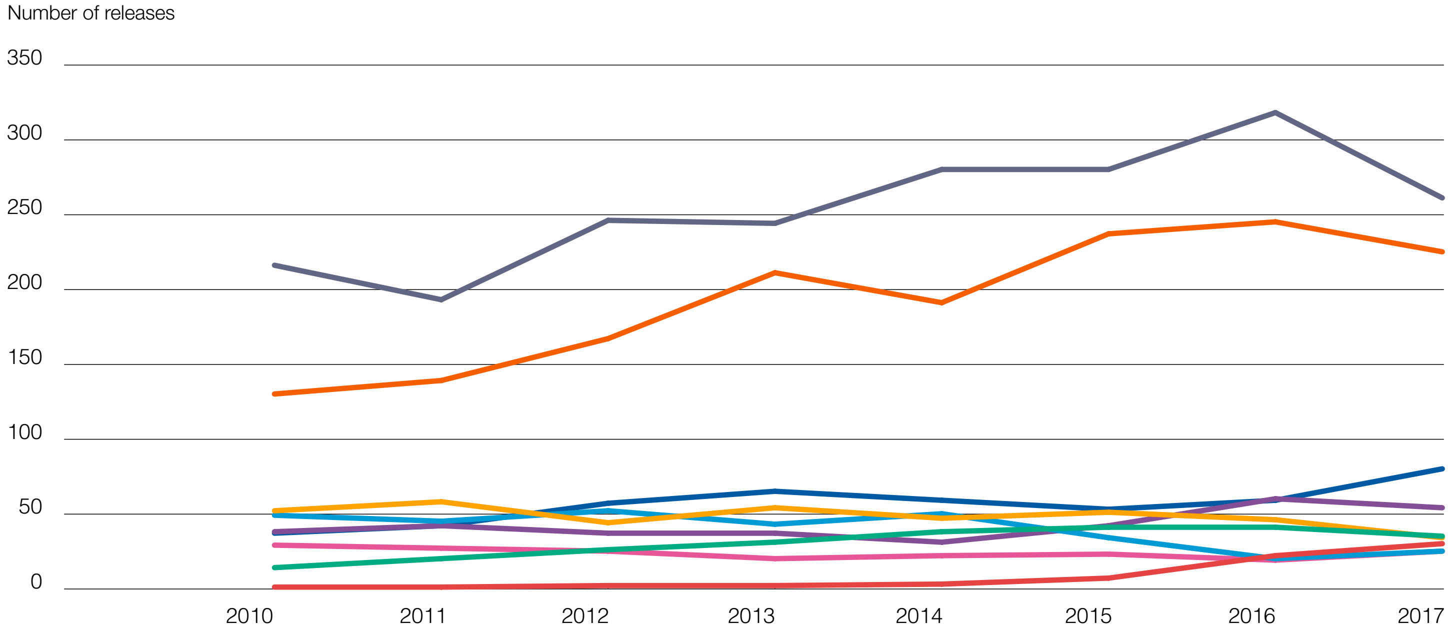
Table 5 Numbers and percentages of releases by widest point of release, 2010-2017

	2010		2011		2012		2013		2014		2015		2016		2017	
Sites at widest point of release	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases
>=600	0	0	0	0	1	0.2	1	0.1	2	0.3	6	0.8	21	2.6	29	3.8
500 - 600	13	2.3	19	3.4	24	3.7	30	4.3	37	5.2	40	5.3	40	4.9	34	4.5
400 - 499	51	9.2	57	10.2	43	6.6	53	7.6	46	6.5	50	6.6	45	5.5	33	4.3
300 - 399	48	8.6	44	7.9	51	7.9	42	6.0	49	6.9	33	4.3	19	2.3	24	3.2
200 - 299	28	5.0	26	4.7	24	3.7	19	2.7	21	2.9	22	2.9	18	2.2	24	3.2
100 - 199	37	6.6	41	7.3	36	5.6	36	5.2	30	4.2	41	5.4	59	7.2	53	7.0
50 - 99	36	6.5	41	7.3	56	8.7	64	9.2	58	8.1	52	6.9	58	7.1	79	10.4
10 - 49	129	23.2	138	24.7	166	25.7	210	30.1	190	26.7	236	31.1	244	29.7	224	29.5
<10	215	38.6	192	34.4	245	37.9	243	34.8	279	39.2	279	36.8	317	38.6	260	34.2
Total	**557**	**100.0**	**558**	**100.0**	**647**	**100.0**	**698**	**100.0**	**712**	**100.0**	**759**	**100.0**	**821**	**100.0**	**760**	**100.0**

Source: comScore, BFI RSU analysis
Note: Percentages may not sum to totals due to rounding.

As Figure 1 shows, between 2010 and 2017 more films were shown at fewer than 50 sites at their widest point of release than any of the higher release width bands. During the period, the number of films released at 200-299 sites has shown a gradual decrease, whilst the number of films released at 500 sites or over has increased year on year. In the other release width bands (50-99, 100-199, 300-399 and 400-499 sites) the numbers of releases vary and no consistent patterns are evident.

Figure 1 Numbers of releases by widest point of release, 2010-2017



	2010	2011	2012	2013	2014	2015	2016	2017
600+	0	0	1	1	2	6	21	29
500-599	13	19	25	30	37	40	40	34
400-499	51	57	43	53	46	50	45	33
300-399	48	44	51	42	49	33	19	24
200-299	28	26	24	19	21	22	18	24
100-199	37	41	36	36	30	41	59	53
50-99	36	41	56	64	58	52	58	79
10-49	129	138	166	210	190	236	244	224
<10	215	192	245	243	279	279	317	260

Source: comScore, BFI RSU analysis

WEEKEND BOX OFFICE

In 2017, just over 59% of box office revenue was generated at weekends (Friday to Sunday), compared with just under 59% in 2016 (Table 6). The pattern of box office takings by day has remained similar and is broadly consistent throughout the period with the exception of the middle of the working week, which was boosted for most of the period by the 'Orange/EE Wednesdays' promotion. Since the end of this promotion in February 2015, the box office share has become more evenly distributed across weekdays, although the current 'Meerkat Movies' promotion, which offers two-for-one tickets on Tuesdays and Wednesdays, is likely to be responsible for some of the recent increase in Tuesday attendances.

Table 6 Box office percentage share by weekday/weekend, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Friday	16.7	16.4	16.0	16.6	16.4	15.8	15.3	15.3	16.1	15.7
Saturday	24.4	24.0	24.1	23.8	24.1	24.9	25.2	23.9	24.6	24.7
Sunday	18.3	17.8	18.5	17.6	17.6	18.2	18.8	18.8	18.3	18.9
Weekend	**59.4**	**58.2**	**58.6**	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**
Monday	9.4	9.2	9.5	9.2	9.3	8.9	9.1	9.5	9.7	8.7
Tuesday	9.5	9.5	9.3	9.1	9.3	9.4	9.4	10.6	10.4	10.3
Wednesday	11.9	13.7	13.2	13.9	13.4	12.6	12.4	10.8	10.9	11.3
Thursday	9.9	9.5	9.3	9.8	9.8	10.2	9.8	10.9	10.1	10.6
Weekday	**40.7**	**41.8**	**41.4**	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**
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.

Image: *Murder on the Orient Express* courtesy of Twentieth Century Fox.

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, which is particularly important for independent films which do not have the backing of the major studios. For many films, opening weekend earnings represent a significant proportion of their final theatrical gross.

Table 7 shows the opening weekend box office as a share of total theatrical revenue over the past decade. In 2017, this share was just under 30%, a similar level to 2015 and 2016. The table illustrates that the highest earning films generally take the lowest percentage of their box office in the opening weekend. In 2017, the year's top film, *Star Wars: The Last Jedi*, earned £28 million over its four-day opening weekend, which represented 34% of its total theatrical gross (to 18 February 2018). Of the year's other top 20 films, those with the highest share of total box office taken on opening weekends were *Fate of the Furious* (47%) and *Thor: Ragnarok* and *Murder on the Orient Express* (both with 40%). However, three of the top 20 films took less than 20% of their total grosses on their opening weekends. *Dunkirk* generated just under 18% of its final gross during its opening weekend, *Paddington 2* earned 19% and *The Greatest Showman* earned 15% (to 18 February 2018). All of these titles were still being shown at over 20 locations 20 weeks after they were released.

Table 7 Opening weekend as percentage of total box office, by box office band, 2008-2017

	% of total in opening weekend									
Range of box office (£ million)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**
>30	21.7	18.8	27.4	29.4	27.0	24.0	27.1	32.2	27.2	26.5
20 - 30	31.0	23.0	35.8	22.6	22.4	30.9	21.9	25.9	28.0	33.3
10 - 19.9	29.2	32.2	26.1	27.6	24.6	27.6	30.9	25.6	29.1	28.5
5 - 9.9	27.6	26.1	26.7	26.2	26.1	28.4	25.9	28.7	32.2	33.2
1 - 4.9	27.4	30.3	30.4	32.2	31.8	32.1	30.3	32.3	33.1	32.1
0.2 - 0.9	34.1	35.5	31.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1
<0.2	34.8	36.5	34.8	38.5	37.8	38.3	40.0	39.6	39.6	41.4
All films	**27.3**	**26.1**	**28.6**	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**

Source: comScore, BFI RSU analysis

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

RELEASE COSTS

Distributors invest heavily in advertising across all media (outdoor posters, print media, television, radio and online) in order to raise a film's profile with potential audiences. As Table 8 shows, the estimated total advertising spend by distributors in 2017 was £230 million, up 8% compared with 2016 (£213 million). However, as the number of film releases in 2017 (760) was down substantially compared with 2016 (821), the average advertising spend per film was up by almost one fifth (19%), rising from £0.26 million to £0.31 million.

While the overall spend by distributors in 2017 was higher compared with 2016, the spend on some traditional advertising platforms continued to decline. The spend on press advertising was the lowest of the entire period and was down 6% compared with 2016, while TV advertising spend (down 13% compared with 2016) was at its lowest since 2010. There were year-on-year increases, however, in expenditure on outdoor and radio advertising. Outdoor advertising spend was up 7% compared with 2016, while radio advertising spend increased by 112%.

Online advertising in 2017 saw the highest monetary increase in expenditure compared with the previous year; spending rose by £19 million (up 41%) to £65 million to make the internet the second most popular platform for film advertising for the first time in the period. However, 2016 and 2017 are the only two recent years where this data is comparable. Online advertising spend between 2013 and 2016 and in the years before 2013 is not comparable due to changes in the Nielson Media Research methodology used to collect this data. A new method, applied in October 2014, significantly reduced the estimation of online spend from Q2 2013 onwards, while a further update to methodology in 2015/16, which included changing the sampling approach and spend calculation, led to a substantial increase in terms of the estimated spend. It should be noted, however, that the advertising industry's own data indicate significant growth in online advertising revenues in the most recent years up to 2016.

Table 8 Estimated advertising spend 2008-2017 (£ million)

Medium	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
TV	79.3	74.3	76.0	90.8	89.1	89.2	101.0	102.2	93.3	81.1
Outdoor	56.2	57.0	61.0	69.1	67.2	71.2	64.2	60.5	52.8	56.5
Press	22.6	19.9	19.9	22.0	21.5	20.7	24.2	21.3	14.9	14.0
Radio	9.4	10.7	7.6	6.8	6.8	5.9	4.6	7.4	5.7	12.1
Sub-total	**167.5**	**161.9**	**163.5**	**188.7**	**188.1**	**187.8**	**194.0**	**191.4**	**166.7**	**163.7**
Internet*	4.5	6.4	6.1	8.5	4.0	2.5	*1.1*	*0.7*	*46.4*	*65.5*
Total	**172.0**	**168.3**	**170.6**	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**

Source: Nielsen Media Research

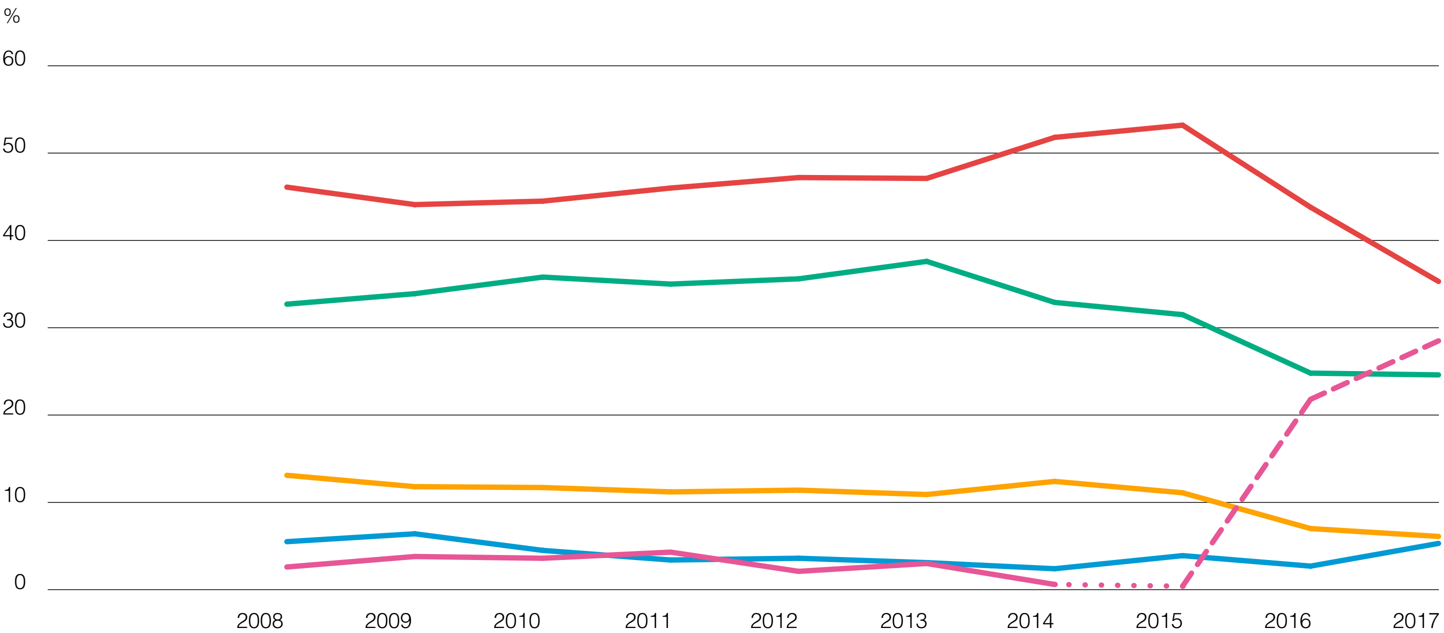
Notes:

Figures may not sum to totals due to rounding.

* The figures for 2013 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2008-2013, 2014-2015 and 2016-2017.

Figure 2 shows the share of advertising spend by medium since 2008. For most of the period the majority of advertising spend was allocated to TV and outdoor advertisements but in 2017, TV and internet advertising made up the largest share of overall spend. The combined share for TV and outdoor advertising has fallen significantly in the last two years; it was 82% in 2015, 69% in 2016, and only 60% in 2017. This decrease is mostly a reflection of the increased value of internet advertising (see above), which accounted for 29% of the total spend in 2017. The share of spend on press advertising has been on a downward trend over the entire period; in 2017 it represented 6% of the total spend whereas, in 2008, it accounted for 13%. Throughout the period, radio advertising has accounted for between 3% and 6% of the total spend; in 2017 it was 5%.

Figure 2 Percentage share of advertising spend by medium, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
TV	46.1	44.1	44.5	46.0	47.2	47.1	51.8	53.2	43.8	35.3
Outdoor	32.7	33.9	35.8	35.0	35.6	37.6	32.9	31.5	24.8	24.6
Press	13.1	11.8	11.7	11.2	11.4	10.9	12.4	11.1	7.0	6.1
Radio	5.5	6.4	4.5	3.4	3.6	3.1	2.4	3.9	2.7	5.3
Internet	2.6	3.8	3.6	4.3	2.1	3.0	*0.6*	*0.4*	*21.8*	*28.5*

Source: Nielsen Media Research

Dashed/dotted line for the internet trend indicates different methodologies for the periods 2008-2013, 2014-2015 and 2016-2017 and lack of comparability over time.

Approximately £64 million was spent on advertising UK films in 2017, up from £62 million in 2016, even though fewer UK films were released in 2017 than in 2016 (159 compared with 176). The advertising spend for studio-backed UK films was £38 million (£1.9 million per film on average, the same as in 2016). Our data on advertising spend for individual films show that the amount spent on advertising independent UK films was £26 million (an average of £186,000 per film, up from £100,000 in 2016), but this is likely to be an underestimate as some advertising spend for smaller films is not allocated to individual titles but to generic spend by distributor.

Using the information on advertising spend, and estimating Digital Cinema Package (DCP) costs, the total release costs for various release widths can be approximated. In creating a DCP, distributors incur digital mastering and duplication costs and in many instances Virtual Print Fees (the cost of booking a film that contributes to the cost of an exhibitor's conversion from analogue projection to digital projection). In the absence of any empirical data on the current average cost of a DCP, we have continued to use the same estimate as when all prints were analogue, which was typically £1,000 per print. So, taking this estimate and adding it to the Nielsen Media Research advertising spend estimate (+20% for other public relations campaigns, publicity and premiere costs), the average release cost for different levels of theatrical release can be calculated.

As Table 9 shows, for films released at the widest number of cinemas (500+) in 2017, the average cost of release was £3.3 million (up 4% from £3.2 million in 2016). Average release costs were also up across all other release widths with the exception of 400-499 sites and 200-299 sites. The largest year-on-year change was seen in films going out on 100-199 cinemas, where release costs increased by more than 50% from £270,000 in 2016 to £410,000.

Table 9 Estimated release cost by width of release, 2008-2017

	Average release cost (£ million)									
Number of sites at widest point of release	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
500+*	3.95	3.40	2.65	3.14	3.13	3.04	2.94	2.87	3.21	3.34
400 - 499	2.21	2.05	2.09	2.17	1.99	2.04	2.04	1.59	1.91	1.82
300 - 399	1.39	1.32	1.24	1.38	1.28	1.15	1.21	1.30	1.01	1.09
200 - 299	0.90	0.84	0.77	0.82	0.83	0.76	0.76	0.72	0.69	0.63
100 - 199	0.43	0.51	0.33	0.31	0.36	0.30	0.35	0.25	0.27	0.41
50 - 99	0.18	0.21	0.20	0.16	0.12	0.13	0.18	0.12	0.12	0.14
10 - 49	0.08	0.06	0.04	0.05	0.04	0.03	0.05	0.03	0.03	0.04
<10	0.01	0.01	0.01	0.01	0.01	0.01	0.01	<0.01	<0.01	<0.01

Source: Nielsen Media Research, comScore, BFI RSU analysis

Notes:

The print costs calculations assume current DCP/print costs are the same as for analogue distribution.

* We are not able to calculate release costs for 600+ locations for this edition of the Yearbook.

Table 10 shows the average cost of release by production budget for the 126 UK films released in 2017 for which budget information is available. The average release costs increased with the size of the production budget, with the largest increase being seen between films in the £5-£9.9 million range and those made for £10 million or more. However, the higher budget films are most likely to have the greatest promotional spend, in particular the large scale inward investment films backed by the major US studios which have considerable marketing budgets. The average release cost for studio-backed films with budgets of £10 million or over was £3 million while the average release cost for UK independent films in this budget band was £2.6 million.

Table 10 Estimated release cost by budget for UK films, 2017

Budget (£ million)	Number of films	Average release cost (£ million)
10+	25	2.95
5 - 9.9	13	1.14
2 - 4.9	28	0.26
0.5 - 1.9	26	0.12
<0.5	34	0.02
All films	**126**	**0.79**

Source: Nielsen Media Research, BFI RSU analysis

See note to Table 9.

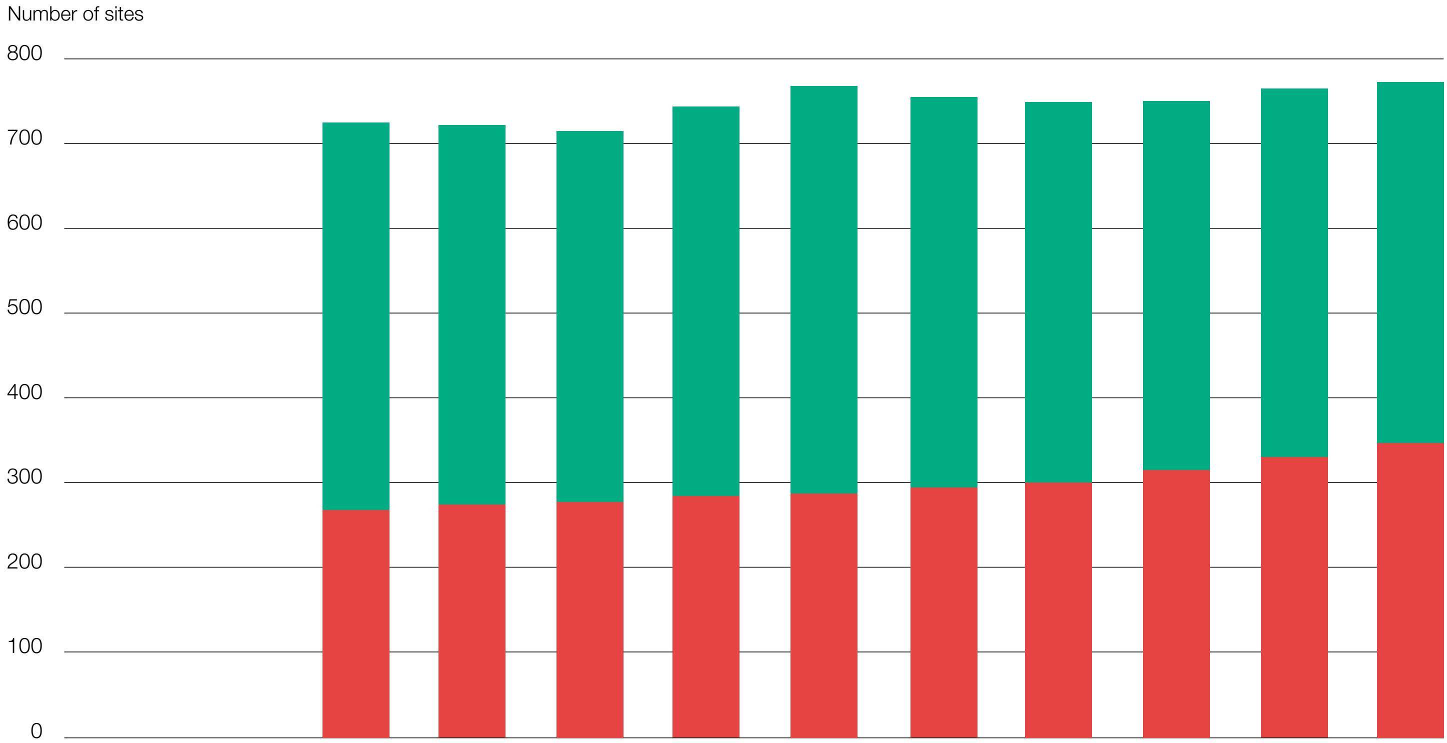
EXHIBITION

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.

UK CINEMA SITES

Figure 3 shows the number of cinema sites in the UK from 2008 to 2017. While the total number of sites has fluctuated over the period there has been a gradual rise in overall provision; there were 774 cinemas in the UK in 2017 compared with 726 in 2008. However, the make-up of sites has changed over the decade. The number of traditional and mixed use sites (mixed use cinemas are used for film screenings only part of the time) has declined, falling from 457 cinemas in 2008 to 426 in 2017, while the number of purpose-built multiplex sites has grown, rising from 269 cinemas in 2008 to 348 in 2017. Multiplex cinemas made up 45% of all sites in 2017 compared with 37% in 2008.

Figure 3 UK cinema sites by type of site, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Multiplex	269	275	278	285	288	295	301	316	331	348
Traditional and mixed use	457	448	438	460	481	461	449	435	435	426
Total sites	726	723	716	745	769	756	750	751	766	774
% multiplex sites	37.1	38.0	38.8	38.3	37.5	39.0	40.1	42.1	43.2	45.0

Source: Dodona Research, BFI RSU analysis

Notes:

Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.

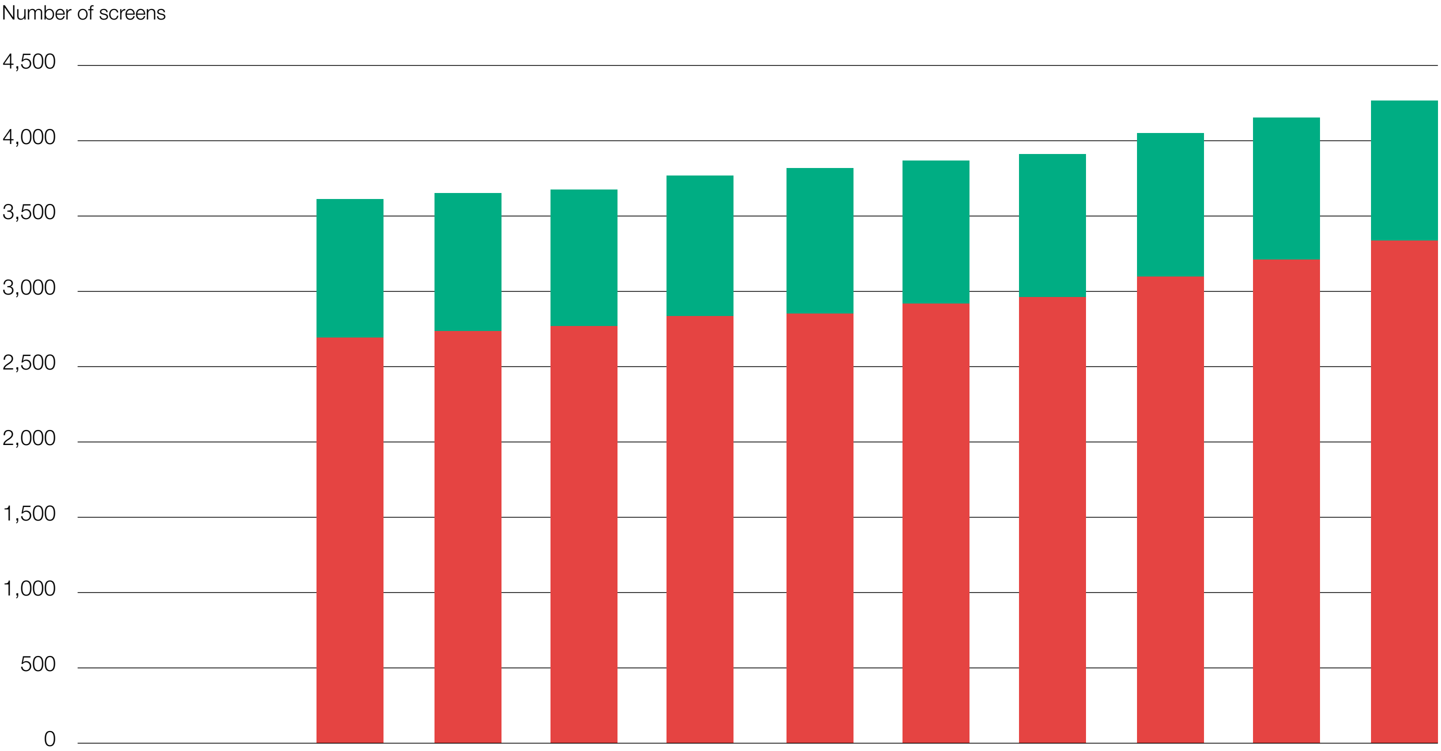
Mixed use cinemas are used for screenings only part of the time.

UK SCREENS

As Figure 4 shows, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) has risen every year since 2008. In 2017, the total number of screens stood at 4,264, a rise of 18% over the decade.

This growth is primarily due to an increase in multiplex provision. Over the period, the UK gained 645 multiplex screens and nine traditional or mixed use screens, while the share of multiplex screens increased from 75% to 78%. In 2017, there were 3,334 multiplex screens and 930 traditional or mixed use screens.

Figure 4 UK cinema screens by type of cinema, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Multiplex	2,689	2,735	2,767	2,833	2,851	2,915	2,959	3,096	3,209	3,334
Traditional and mixed use	921	916	904	934	966	952	950	950	941	930
Total screens	3,610	3,651	3,671	3,767	3,817	3,867	3,909	4,046	4,150	4,264
% multiplex screens	74.5	74.9	75.4	75.2	74.7	75.4	75.7	76.5	77.3	78.2

Source: Dodona Research, BFI RSU analysis
See notes to Figure 3.

SCREEN LOCATION

In 2017, 97% of all screens in the UK were located in urban or suburban locations. There were increases in the numbers of screens in all locations during the year compared with 2016 with the exception of suburban areas (where there was no change) and rural areas which lost one screen (Table 11). The largest increase numerically was seen in town and city centre cinemas, where there were 59 new screens, an increase in provision of 3% compared with 2016, whilst there were 21 new edge of centre screens (a 3.5% increase).

The table also shows that suburban and rural cinemas tend to have fewer screens on average than their urban counterparts, although town and city centre sites are also relatively small.

Table 11 Screens by location, 2008-2017

Location	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2016-2017	Average number of screens per site
Town/city centre	1,683	1,732	1,726	1,785	1,848	1,866	1,901	1,932	1,998	2,057	3.0	4.3
Out of town	1,303	1,297	1,311	1,335	1,310	1,328	1,335	1,413	1,422	1,457	2.5	10.1
Edge of centre	499	498	506	518	523	534	540	561	592	613	3.5	8.6
Suburban	30	27	28	28	27	26	25	26	29	29	-	1.9
Rural	95	97	100	101	109	113	108	114	109	108	-0.9	1.6
Total	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**	**2.7**	**5.5**

Source: Dodona Research, BFI RSU analysis

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION – INTERNATIONAL COMPARISONS

A standard way to gauge the level of cinema provision is by ‘screen density’, ie the number of screens per unit of population. According to IHS, in 2017, screen density in the UK was 6.5 screens per 100,000 people, a slight increase from 6.4 in 2016. This level of access to screens falls short of that in other major film territories: USA (12.4), France (9.1), Australia (9.0), Spain (7.6) and Italy (6.6). Germany’s screen density, at 5.3 screens per 100,000 people, is less than the UK’s. (The world’s fastest expanding territory China, had 3.6 screens per 100,000 people in 2017.)

Table 12 shows the level of admissions per head of population in a number of major film territories. The UK saw more admissions per head (2.6) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the selected territories, Australia (3.7) and the USA (3.5) had the highest admissions per head of population.

Table 12 Admissions per head of population in selected major film territories, 2008-2017 (ranked by 2017 admissions)

	Australia	USA	France	UK	Spain	Italy	Germany
2008	3.9	4.1	3.2	**2.7**	2.3	1.7	1.6
2009	4.1	4.2	3.4	**2.8**	2.4	1.6	1.8
2010	4.1	4.0	3.5	**2.7**	2.2	1.8	1.5
2011	3.8	3.8	3.6	**2.7**	2.1	1.7	1.6
2012	3.7	3.9	3.4	**2.7**	2.0	1.5	1.7
2013	3.7	3.8	3.2	**2.6**	1.7	1.6	1.6
2014	3.3	3.6	3.1	**2.4**	1.9	1.5	1.5
2015	3.6	3.9	3.1	**2.6**	2.0	1.6	1.7
2016	3.7	3.6	3.3	**2.6**	2.2	1.8	1.5
2017	3.7	3.5	3.2	**2.6**	2.2	1.6	1.5

Source: IHS

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION IN THE UK

As in previous editions of the Yearbook we are able to present screen provision data based on two types of 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.

The Cinema Advertising Association produces monthly admissions totals for each of the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Screen and admissions data for 2017 using these television regions are presented in Table 13. The population figures for the ISBA regions are based on the Broadcasters' Audience Research Board (BARB) 2017 population estimates and so the UK total shown in this table is higher than the UK population shown in Table 14 which is based on the official mid-2014 population estimates. The higher UK population total figure shown in Table 13 also results in the figures for screen density shown in this table being different to the corresponding IHS estimates.

Although London had the greatest numbers of screens and sites, its screen density, at 7.0 screens per 100,000 people, was lower than that of Northern Ireland (11.6), Central Scotland (7.3) and the Midlands (7.1). The South and South East had the lowest screen density (5.3) of all the ISBA regions.

The average cost of a cinema ticket in the UK in 2017, calculated by dividing the UK-only box office gross (£1,280 million) by total UK admissions (170.6 million), was £7.49, up from £7.30 in 2016.

For the first time we are able to approximate the average price of cinema tickets by region. There is a wide variation in ticket prices across the country, with an average ticket in London being over 80% more expensive than in Northern Ireland which had both the lowest average ticket price (£4.94) and the highest admissions per head of population (3.1) of any region. However, the correlation between low ticket prices and admissions does not relate to London which has the second highest admissions per head (3.0) but also substantially the highest average ticket price (£8.94) which is £1.50 higher than the UK average.

Table 13 Screens and admissions by ISBA TV region, 2017 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (000)*	Admissions (million)	Admissions per screen	Admissions per head	Average ticket price (£)
Northern Ireland	11.6	220	5.2	30	1,859	5.8	26,366	3.1	4.94
Central Scotland	7.3	271	6.4	41	3,741	11.2	41,212	3.0	7.28
Midlands	7.1	625	14.7	109	8,772	20.6	32,931	2.3	7.19
London	7.0	932	21.9	163	13,422	40.0	42,897	3.0	8.94
North West	6.7	472	11.1	66	7,033	16.2	34,231	2.3	7.21
Wales and West*	6.4	348	8.2	76	5,421	13.0	37,276	2.4	6.82
Northern Scotland	6.3	82	1.9	20	1,328	3.5	42,148	2.6	6.68
South West	6.3	113	2.7	33	1,838	4.0	35,301	2.2	6.70
North	5.6	356	8.3	61	6,354	14.1	39,714	2.2	7.13
East	5.5	270	6.3	52	4,903	14.0	51,944	2.9	7.42
Border	5.5	33	0.8	16	615	1.1	32,186	1.7	6.97
North East	5.5	153	3.6	26	2,760	6.7	43,552	2.4	6.65
South and South East	5.3	389	9.1	81	7,387	20.6	53,015	2.8	7.37
Total	**6.5**	**4,264**	**100.0**	**774**	**65,434**	**170.6**	**40,013**	**2.6**	**7.49**

Source: Dodona Research, BARB, Cinema Advertising Association (CAA), BFI RSU analysis

Notes:

* BARB population estimates based on the 2017 UK population, and so the UK total is higher than the UK population shown in Table 14 which is the official mid-2014 population estimate.

Figures may not sum to totals due to rounding.

Table 14 gives screen information for each of the English regions, plus Scotland, Wales and Northern Ireland. Northern Ireland had the highest number of screens per 100,000 people in 2017 (12.0), followed by London (7.5), the South East (7.3), and Scotland and the South West (both with 6.8). The East of England had the fewest screens per 100,000 people at 4.7 screens followed by the East Midlands which had 5.0 screens.

Table 14 Screens and population in the nations and regions, 2017 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (000)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	220	5.2	30	1,840	12.0	7.3
London	641	15.0	111	8,539	7.5	5.8
South East	648	15.2	132	8,874	7.3	4.9
South West	370	8.7	84	5,423	6.8	4.4
Scotland	363	8.5	67	5,348	6.8	5.4
Wales	207	4.9	50	3,092	6.7	4.1
North West	474	11.1	68	7,133	6.6	7.0
West Midlands	349	8.2	55	5,713	6.1	6.3
Yorkshire and The Humber	320	7.5	55	5,360	6.0	5.8
North East	140	3.3	21	2,619	5.3	6.7
East Midlands	230	5.4	44	4,637	5.0	5.2
East of England	285	6.7	53	6,018	4.7	5.4
Other**	17	0.4	4	n/a	-	4.3
England sub-total	3,457	81.1	623	54,317	6.4	5.5
Total	**4,264**	**100.0**	**774**	**64,597**	**6.6**	**5.5**

Source: Dodona Research, Office for National Statistics (ONS), BFI RSU analysis

Notes:

* ONS Mid-year population estimates 2014.

** Other includes the Channel Islands and the Isle of Man.

n/a = not available.

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

Table 14 also shows that Northern Ireland and the North West had the highest averages for screens per site at 7.3 and 7.0 respectively. The South West and Wales along with ‘other’ (which includes the Channel Islands and the Isle of Man) had the lowest averages for screens per site showing a tendency towards smaller cinemas and, particularly for the South West and ‘other’, proportionally fewer multiplex screens (Table 15).

TYPE OF CINEMA SCREENS BY NATION AND REGION

Table 15 provides a snapshot of variations in multiplex provision around the UK. The South East had the largest number of multiplex screens (491) in 2017, followed by London (444) and the North West (430). Northern Ireland had the highest proportion of multiplex screens (92%) followed by the North West (91%) and North East (90%). In England the lowest concentration of multiplex screens was found in the South West (63%), which had a high number of traditional and mixed use screens (the third highest after London and the South East). London had the highest number of traditional and mixed use screens but its percentage of multiplex screens, at 69%, was the second lowest in England. Across the nations, after Northern Ireland, Wales had the highest proportion of multiplex screens (80%), followed by England and Scotland, both of which had 77%.

Table 15 Cinema screens by type by nation or region, 2017 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed use	Total
Northern Ireland	202	91.8	18	220
North West	430	90.7	44	474
North East	126	90.0	14	140
Yorkshire and The Humber	265	82.8	55	320
East Midlands	185	80.4	45	230
West Midlands	279	79.9	70	349
Wales	165	79.7	42	207
East of England	223	78.2	62	285
Scotland	280	77.1	83	363
South East	491	75.8	157	648
London	444	69.3	197	641
South West	234	63.2	136	370
Other*	10	58.8	7	17
England sub-total	2,677	77.4	780	3,457
Total	**3,334**	**78.2**	**930**	**4,264**

Source: Dodona Research, BFI RSU analysis

* Other includes the Channel Islands and the Isle of Man.

MAINSTREAM, SPECIALISED AND SOUTH ASIAN PROGRAMMING

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

Table 16 shows that by far the majority of screens primarily show mainstream films. In 2017, 609 cinemas with 3,946 screens showed mostly mainstream films (a 2% increase in the number of both sites and screens compared with 2016). There were 162 sites (21% of all sites) with 312 screens (7% of screens) showing mainly specialised films and three cinemas (0.4% of all sites) with six screens (0.1% of all screens) dedicated mainly to South Asian films. The number of both sites and screens showing mostly specialised films increased by 2% in 2017 compared with 2016.

Table 16 Sites and screens by programme, 2008-2017

Programme	Sites									
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
South Asian	4	4	3	3	3	2	2	3	3	3
Specialised	168	168	163	171	177	168	165	153	159	162
Mainstream	554	551	550	571	589	586	583	595	604	609
Total	**726**	**723**	**716**	**745**	**769**	**756**	**750**	**751**	**766**	**774**
Programme	**Screens**									
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
South Asian	10	10	7	7	7	4	4	6	6	6
Specialised	250	253	248	259	268	265	275	280	300	312
Mainstream	3,350	3,388	3,416	3,501	3,542	3,598	3,630	3,760	3,844	3,946
Total	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**

Source: Dodona Research, BFI RSU analysis

For the second consecutive year since our analysis began, the majority of specialised screens (54%) 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 arthouse cinema chains such as Everyman and Picturehouse (itself owned by Cineworld) which have a broader programming focus than the larger exhibitors.

The pattern of programme type by location in 2017 is shown in Table 17. Screens showing mostly South Asian films were located in town or city centres and suburban areas, while those devoted to specialised film were found mainly in town or city centres. The overall pattern remained similar to earlier years.

Table 17 Percentages of screens by location and programme, 2017

Location	Mainstream	Specialised	South Asian	Total
Town/city centre	45.1	88.1	66.7	48.2
Out of town	36.8	1.6	-	34.2
Edge of centre	15.4	1.3	-	14.4
Suburban	0.4	3.5	33.3	0.7
Rural	2.3	5.4	-	2.5

Source: Dodona Research, BFI RSU analysis

This geographical analysis is extended in Table 18, which shows the distribution of specialised screens around the UK. Screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 50% of the UK total in 2017. Yorkshire and The Humber had 28 specialised screens (9% of total screens) and Scotland and the South West both had 25 (8%). Northern Ireland (0.6%), the North East (1.9%) and Wales (2.9%) had the smallest shares of specialised screens.

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

Table 18 Geographical spread of specialised screens, 2017

Nation/region	Number of specialised screens	% of specialised screens
London	108	34.6
South East	49	15.7
Yorkshire and The Humber	28	9.0
South West	25	8.0
Scotland	25	8.0
East of England	19	6.1
East Midlands	14	4.5
North West	14	4.5
West Midlands	13	4.2
Wales	9	2.9
North East	6	1.9
Northern Ireland	2	0.6
Total	**312**	**100.0**

Source: Dodona Research, BFI RSU analysis


Image: *Tiger Zinda Hai* courtesy of Yash Raj Films

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 2017, the three largest exhibitors owned 38% of all UK cinemas and 64% of UK screens.

Table 19 shows that in 2017, 17 exhibitors owned or programmed 20 or more screens in the UK. (This is the same number as in 2015 and 2016.) Collectively, these exhibitors have gained 13 sites since 2016 and 138 screens. The largest increases were recorded by Cineworld, which added four sites and 54 screens, and Vue, which added two sites and 33 screens. Two of the 17 exhibitors lost sites and screens during the year: Odeon's cinema stock fell by one site and 10 screens, while Reel Cinemas lost one site and three screens.

Table 19 Cinema screens by exhibitors with 20 or more screens, 2017

Exhibitor	Sites	Screens	% of total screens
Cineworld	99	1,008	23.6
Odeon	110	877	20.6
Vue	86	831	19.5
National Amusements	21	278	6.5
Empire Cinemas	14	129	3.0
Omniplex	14	110	2.6
Picturehouse (Cineworld)	24	72	1.7
Everyman Media Group	23	69	1.6
Light Cinemas	8	62	1.5
Reel Cinemas	14	59	1.4
Merlin Cinemas	15	42	1.0
Curzon	15	41	1.0
Movie House Cinemas	5	39	0.9
Irish Multiplex Cinemas	5	34	0.8
PDJ Cinemas	5	22	0.5
Savoy Cinemas	4	21	0.5
Parkway Entertainment	4	20	0.5
Other (16 major exhibitors and 258 independent single venue exhibitors)	308	550	12.9
Total	**774**	**4,264**	**100.0**

Source: Dodona Research

Notes:

Figures correct as at December 2017.

Percentages may not sum to 100 due to rounding.

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

In 2016, the Odeon chain was bought by AMC Entertainment, a US cinema chain owned by Chinese conglomerate Dalian Wanda, the world's largest cinema operator. 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.

National Amusements was owned by the family of Sumner Redstone, chairman of US media giant Viacom.
Empire is owned by the Anderson family. 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.

EXHIBITOR REVENUES

As Table 20 shows, the top six exhibitors had a 79% share of overall box office receipts in the UK and Republic of Ireland in 2017; 69% of the box office was shared between the top three exhibitors.

Dodona Research reports that exhibitors' revenues from refreshment sales in 2017 were £466 million, an increase of 3% compared with 2016 (£452 million). The average spend on refreshments per individual visit increased from £2.69 to £2.73.

Table 20 Exhibitor share of box office in the UK and Republic of Ireland, 2017

Exhibitor	Market share (%)	Box office gross (£ million)*
Cineworld	24.8	317.1
Odeon	24.2	309.4
Vue	20.0	255.7
National Amusements	5.7	72.9
Picturehouse (Cineworld)	2.4	30.7
Empire Cinemas	2.0	25.6
Sub-total	**79.1**	**1,011.4**
Other	20.9	267.2
Total	**100.0**	**1,278.7**

Source: Dodona Research and comScore

Notes:

* Box office gross is for all films on release in 2017. This includes titles which were first released in 2016.

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

DIGITAL PROJECTION

Since 2014, nearly every screen in the UK has been capable of digital projection. The digitisation of cinema projection has increased the scope for making a wider range of films available to audiences and allowed for the introduction of subtitles for the hearing impaired and audio description for the visually impaired. Audiences are also now able to watch films in digital 3D and access a wide range of alternative content programming, such as live screenings of cultural and sporting events.

ACCESSIBLE CINEMA

All UK cinemas now have English language subtitle/caption and audio description (ST/AD) facilities. Almost every multiplex cinema and many smaller cinemas regularly screen the latest popular releases with on-screen English language captions. Around 1,500 such screenings are provided weekly, by more than 60 exhibitors, in around 600 cinemas nationwide (over three quarters of sites). The estimated audience for these screenings in 2017 was 1.2 million, and they generated approximately £8.8 million in box office revenues. (It should be noted that these revenue figures exclude the impact of a popular discount scheme which allows free access to carers accompanying disabled cinema-goers, so the actual box office figures may be lower.)

Data from 'YourLocalCinema.com' shows that in 2017, 172 English language films were shown in UK cinemas with captions and 167 were shown with audio description.

Over the last decade more than 1,000 titles have been made accessible to sight or hearing impaired audiences, including almost all of the top 10 films of each year. All of the top 20 films at the UK box office in 2017 had ST/AD tracks.

3D AND EVENT CINEMA

According to IHS, of the 4,309 digital screens in the UK at the end of 2017, 2,030 (47%) were 3D-capable digital screens. (The total number of screens differs here to the figure used previously because of the different methodologies employed by IHS and Dodona Research.) Some of the popular 3D screenings in 2017 included *Star Wars: The Last Jedi*, *Beauty and the Beast* and *War for the Planet of the Apes.*

Table 21 shows the increase in the number of 3D digital screens in the UK since 2008. The growth in such screens coincided with an increase in the availability of 3D content internationally. In 2017, 37 films were released in 3D (nine less than in 2016).

Table 21 3D digital screens in the UK, 2008-2017

Year	Number of 3D digital screens	Total digital screens	3D % of all digital screens	Top performing digital 3D title in the UK and Republic of Ireland
2008	69	310	22.3	Fly Me to the Moon
2009	449	642	69.9	Avatar
2010	1,067	1,415	75.4	Toy Story 3
2011	1,475	2,714	54.3	Harry Potter and the Deathly Hallows: Part 2
2012	1,564	3,538	44.2	The Hobbit: An Unexpected Journey
2013	1,655	3,868	42.8	Gravity
2014	1,772	3,946	44.9	The Hobbit: The Battle of the Five Armies
2015	1,854	4,123	45.0	Star Wars: The Force Awakens
2016	1,908	4,231	45.1	Rogue One: A Star Wars Story
2017	2,030	4,309	47.3	Star Wars: The Last Jedi

Source: IHS, comScore, BFI RSU analysis

Notes:

3D digital screens are capable of screening content made in stereoscopic 3D format.

Top performing digital 3D titles in the UK and Republic of Ireland are based on takings from 3D and IMAX 3D screenings.

Event cinema, alternative content or non-feature film programming has become a regular feature in the UK over recent years following the shift to digital projection. The roll-out of a digital screen base has widened the range of content available on the big screen, allowed for greater interactivity between the screen and the audience and has potentially improved the use of auditorium capacity during typically quiet periods. Also, since events are usually shown only once or twice (often as a simultaneous screening of a live performance or event and a subsequent catch-up screening) they can often generate higher occupancy rates than feature films.

Table 22 shows the number of events and box office takings by type of event screened in 2017. According to comScore, 134 events, the majority of which were live, were screened in the year, down from 177 in 2016. However, these events generated a total box office of £34 million compared with £33 million in 2016. Screenings of opera productions were the most popular form of alternative content programming in the year with 35 performances (26% of all events), while screenings of theatre performances generated the highest earnings (£11 million), a 32% share of the total box office.

Table 22 Number and box office takings of events screened in UK cinemas by type of event, 2017 (ranked by gross box office)

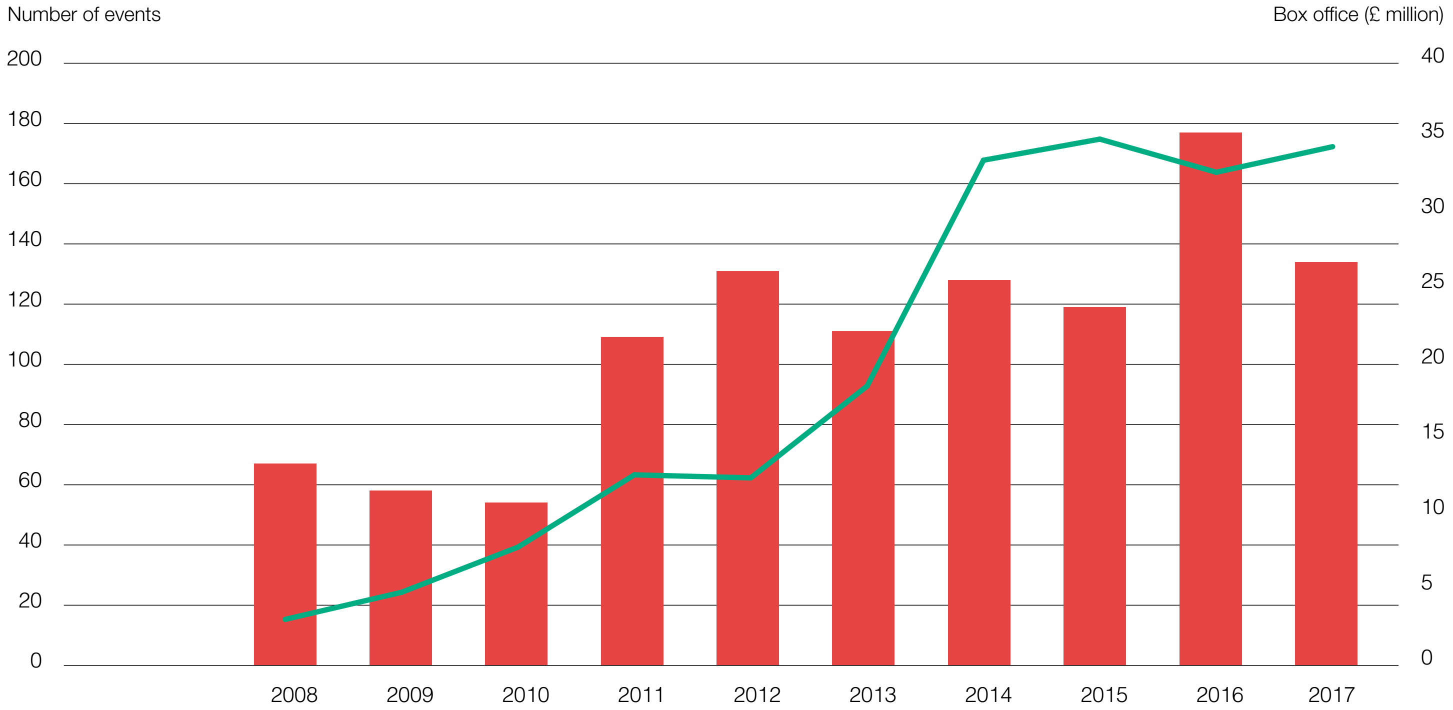
Type of event	Number of events	% of events	Box office (£ million)	% of box office
Theatre	25	18.7	11.1	32.3
Opera	35	26.1	6.8	19.8
Film/documentary	14	10.4	5.7	16.6
Ballet/dance	15	11.2	4.6	13.4
Popular music concert	9	6.7	2.0	5.9
Classical concert	5	3.7	1.6	4.7
TV	9	6.7	1.5	4.3
Exhibition	15	11.2	0.7	1.9
Sport	3	2.2	0.2	0.6
Talk	4	3.0	0.2	0.5
Total	**134**	**100.0**	**34.5**	**100.0**

Source: comScore

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

Figure 5 shows the number of event cinema screenings and their associated box office earnings over the last 10 years. Since 2011, the number of events screened annually has ranged between 110 and 130, although it was as high as 177 in 2016. There has been a general upward trend in box office over the period with a large spike between 2012 (£12.5 million) and 2014 (£33.6 million), since when revenues have remained at between £33 million and £35 million annually.

Figure 5 Number of events screened and box office earnings, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of events	67	58	54	109	131	111	128	119	177	134
Box office (£ million)	3.1	4.9	7.9	12.7	12.5	18.6	33.6	35.0	32.8	34.5

Source: comScore

HOME ENTERTAINMENT

Image: *Pirates of the Caribbean: Salazar's Revenge* © Disney Enterprises, Inc. All Rights Reserved

FACTS IN FOCUS

VALUE OF FILM ON PHYSICAL VIDEO

Sales in 2017

£503 million

Down 15% on 2016

Rentals in 2017

£37 million

Down 23% on 2016

TOP FILM ON DVD AND BLU-RAY

The UK studio backed title **Beauty and the Beast** was the most popular physical video purchase in 2017

VALUE OF DIGITAL VIDEO

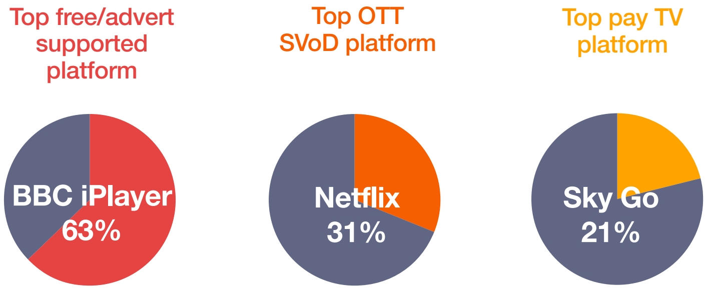
Subscription Video on Demand (SVoD), Video on Demand (VoD) rental and Electronic Sell Through (EST)

UP 18% on 2016

£681 million

DIGITAL VIDEO PLATFORMS

% reach (UK adults) of the UK's top VoD services in 2017



WHAT AUDIENCES WATCH ON SVoD

24% film

76% TV programmes

UK SVoD subscribers spend **24%** of their viewing time watching films and **76%** watching TV programmes

TOP FILM ON SVoD

The UK independent title **The King's Speech** was the most viewed film of the year across the top three SVoD platforms (Netflix, Amazon Prime and Now TV)

FILM ON TELEVISION

In total, there were **3.7 billion** viewings of film on UK television in the year.

The value of feature film to UK broadcasters in 2017 was **£861m**

Of which **£142m** was attributable to UK films

TOP FILM ON TELEVISION

The US studio title **Jurassic World** achieved the largest single audience on a terrestrial television channel attracting **6.3 million** viewers

HOME ENTERTAINMENT

FILM ON PHYSICAL VIDEO

Despite falling revenues, particularly in the rental market, physical video remains an important element of the film value chain illustrating that audiences for film still appreciate physical ownership.

‘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 (formerly the British Video Association); it does not include downloads which are discussed in the digital video section below.

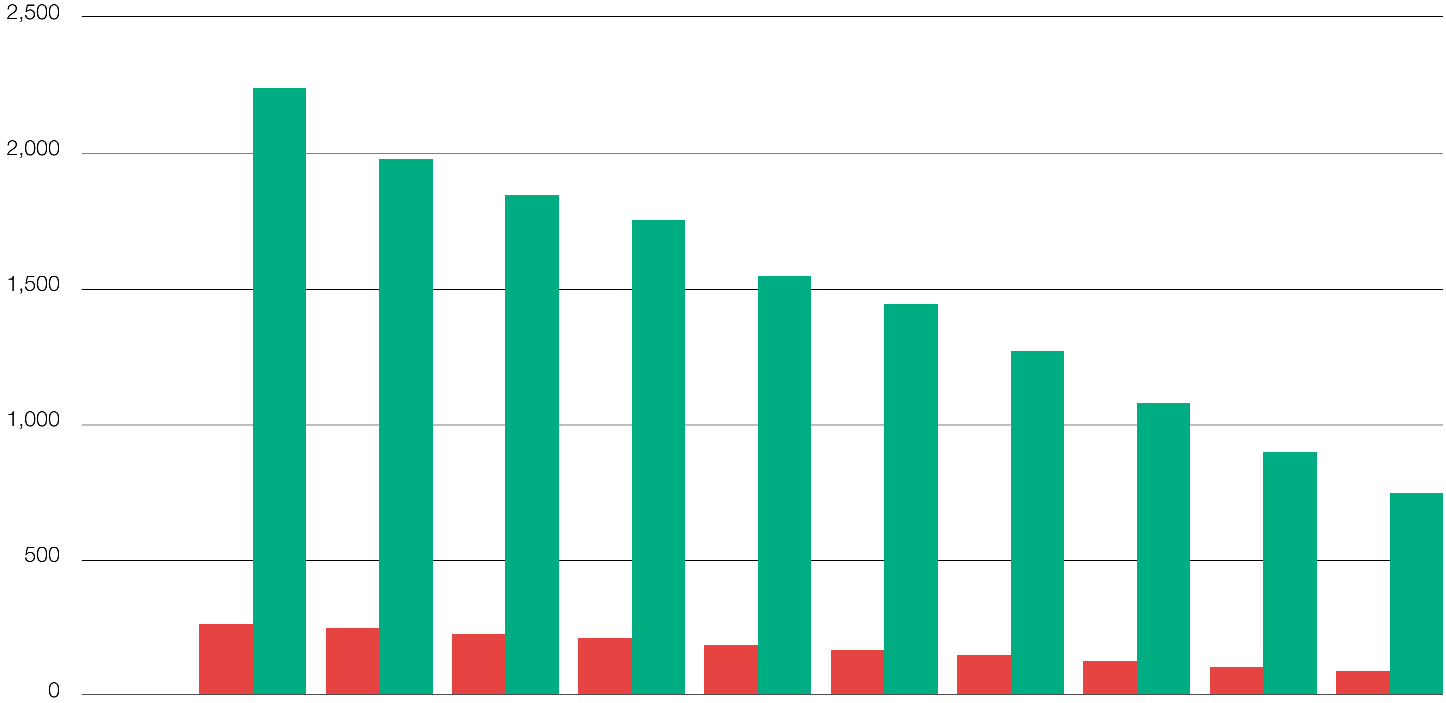
FILM IN THE PHYSICAL VIDEO RETAIL MARKET

As Figure 1 shows, the volume and value of physical video sales in all categories in the UK have declined each year between 2008 and 2017. (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.)

In 2017, 83 million videos were sold in the UK (down 18% compared with 2016) with a total market value of £742 million (down 17% compared with 2016). DVDs accounted for the majority of video sales (78% by value and 86% by volume), while Blu-ray disc purchases accounted for 22% of sales by value and 14% of sales by volume.

Feature film represented approximately 68% of the physical sell-through market by value (£503 million) and 75% by volume (62 million units) in 2017. UK films accounted for around 34% of sales by value (an increase from 33% in 2016) and 31% of sales by volume (the same as in 2016).

Figure 1 Retail video sales (all categories), 2008-2017



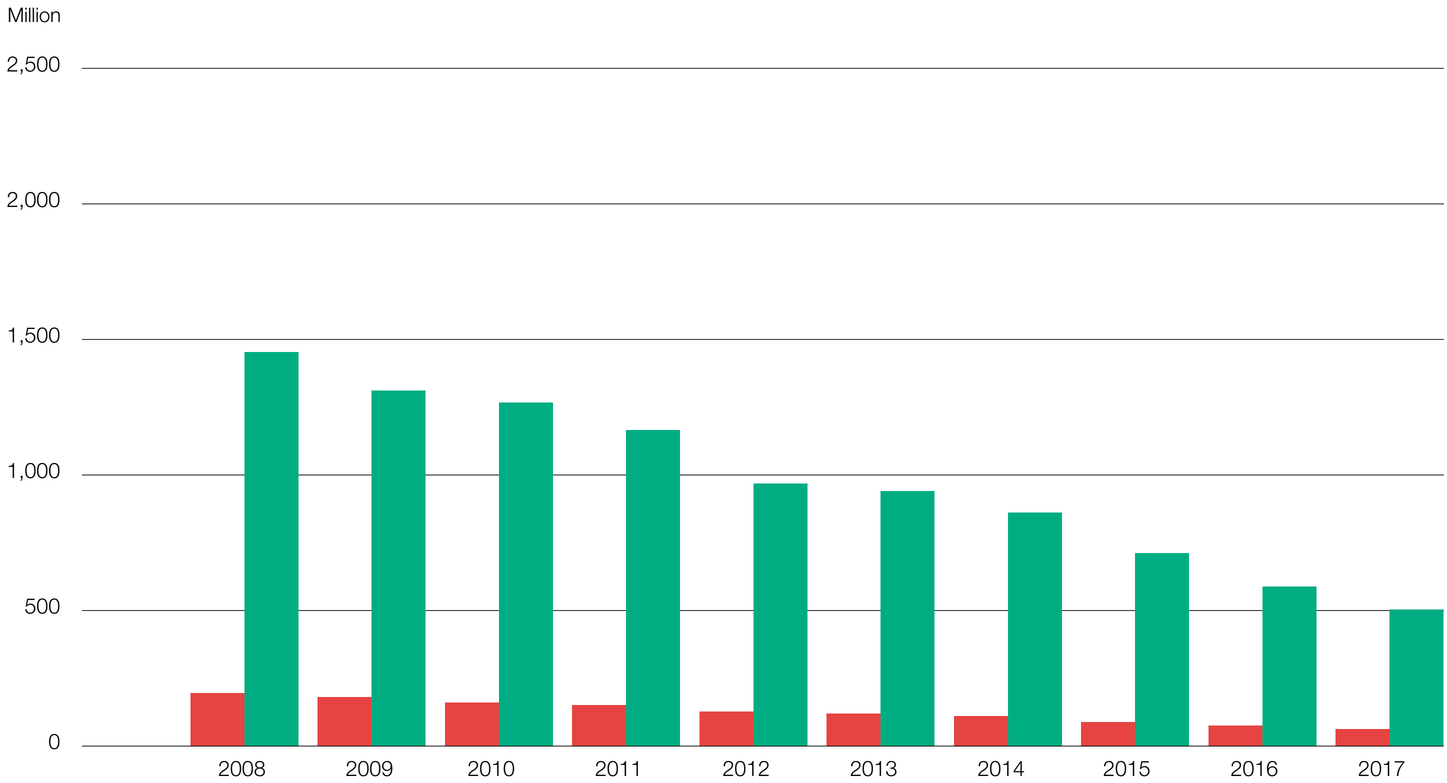
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Volume (million)	257	243	223	207	179	162	143	120	101	83
Value (£ million)	2,237	1,975	1,839	1,749	1,543	1,438	1,264	1,075	894	742

Source: BASE, IHS

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 2008 and 2017 mirrors that of the overall physical sell-through market. The number of videos sold decreased each year during the decade, falling from 196 million units in 2008 to 62 million units in 2017, while the value of sales fell from £1.5 billion in 2008 to just over £500 million in 2017.

Figure 2 Film on physical video retail sales, 2008-2017

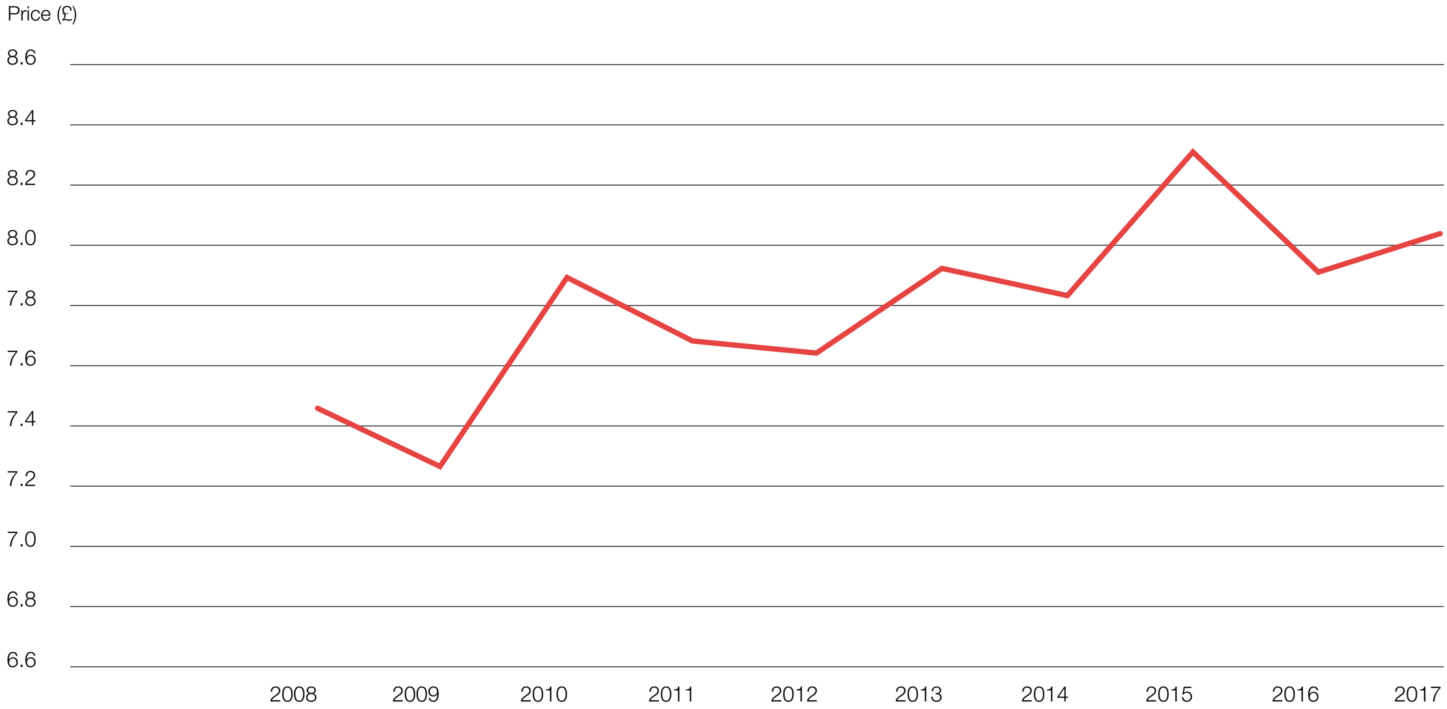


	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Volume (million)	196	180	160	152	127	119	110	89	75	62
Value (£ million)	1,454	1,311	1,267	1,165	968	940	861	712	589	503

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 2008 and 2017. There has been on overall upward trend over the decade, with average prices rising from £7.42 in 2008 to £8.06 in 2017. The lowest average price per unit over the period was recorded in 2009 (£7.29), while the highest was achieved in 2015 (£8.36).

Figure 3 Average retail price of film per unit, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Price (£)	7.42	7.29	7.90	7.64	7.62	7.93	7.83	8.36	7.91	8.06

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

Figure 4 shows that the most popular genre on sell-through video in 2017 was action/adventure, which accounted for 18% of the market (21% in 2016). Sci-fi was the next most popular with 16.5% of sales, followed by animation with 14.5%. (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 first chapter of the Yearbook: Film at the cinema.)

Figure 4 Sales of film on physical video formats by genre, 2017

Genre	%
Action/adventure	18.3
Sci-fi	16.5
Animation	14.5
Drama	11.1
Child/family	10.7
Comedy	8.9
Thriller	5.1
Horror	4.4
War	3.8
Musical	1.7
Fitness	1.3
Western	1.1
Documentary	0.9
Anime	0.8
Sport/health	0.8
Adult	0.1
Bollywood	<0.1
Other	<0.1

Source: Official Charts Company, BASE

Note: These genres are assigned by BASE; the categories are not the same as those in the Film at the cinema chapter.

TOP FILMS ON PHYSICAL VIDEO

Table 1 shows the top 10 best-selling films on physical video in 2017. The list is headed by *Beauty and the Beast*, the second highest grossing film at the UK and Republic of Ireland box office in 2017. Half of the top 10 titles were released theatrically in 2017 and the remaining five were released in 2016. All five 2017 releases were among the year's top 20 highest box office earners. There are five UK films in the list, all of which were made in collaboration with the major US studios.

Table 1 Top 10 best-selling films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Beauty and the Beast	UK/USA	2017	Walt Disney
2	Rogue One: A Star Wars Story	UK/USA	2016	Walt Disney
3	Fantastic Beasts and Where to Find Them	UK/USA	2016	Warner Bros
4	Moana	USA	2016	Walt Disney
5	Bridget Jones's Baby	UK/USA/Fra	2016	Universal
6	Guardians of the Galaxy: Vol 2	USA/NZ/Can	2017	Walt Disney
7	Dunkirk	UK/USA	2017	Warner Bros
8	Trolls	USA	2016	Dreamworks
9	Sing	USA/Jpn	2017	Universal
10	Despicable Me 3	USA	2017	Universal

Source: Official Charts Company

The top 10 UK qualifying films on physical video in 2017 include five titles which are also in the overall top 10 films on video for the year (Table 2). As with the previous table, half of the top 10 titles were released theatrically in 2017 and the remaining five were released in 2016. Two of the 2017 releases (*Beauty and the Beast* and *Dunkirk*) were among the year's top 20 best performing films at the UK box office. *T2 Trainspotting* is the only independent UK film in the list.

Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Beauty and the Beast	UK/USA	2017	Walt Disney
2	Rogue One: A Star Wars Story	UK/USA	2016	Walt Disney
3	Fantastic Beasts and Where to Find Them	UK/USA	2016	Warner Bros
4	Bridget Jones's Baby	UK/USA/Fra	2016	Universal
5	Dunkirk	UK/USA	2017	Warner Bros
6	Doctor Strange	UK/USA	2016	Walt Disney
7	Wonder Woman	UK/USA/HK/Chn	2017	Warner Bros
8	Pirates of the Caribbean: Salazar's Revenge	UK/USA	2017	Walt Disney
9	T2 Trainspotting	UK/USA#	2017	Sony
10	Miss Peregrine's Home for Peculiar Children	UK/USA	2016	20th Century Fox

Source: BFI RSU analysis of Official Charts Company data

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

The top 10 best-selling UK independent films on video in 2017 include one title that appears in the previous two tables: *T2 Trainspotting*. The film was the second highest earning UK independent film at the UK box office in 2017 and is one of four titles in the list released theatrically in 2017. The oldest title in the list is the original *Trainspotting* which was first released in UK cinemas in 1996.

Two of the titles in the list have appeared in previous top 10s: *Paddington* features in the list for a third consecutive year, while *Legend* features for a second consecutive year. The list contains one non-fiction title, *Kenny*, the year's best-selling feature documentary on video.

Table 3 Top 10 best-selling UK independent films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	T2 Trainspotting	UK/USA#	2017	Sony
2	Paddington	UK/Fra	2014	StudioCanal
3	A Street Cat Named Bob	UK	2016	Sony
4	Trainspotting	UK	1996	FilmFour
5	Baby Driver	UK/USA#	2017	Sony
6	The Hatton Garden Job	UK	2016	Signature Entertainment
7	I, Daniel Blake	UK/Fra/Bel	2016	eOne Films
8	Legend	UK/Fra/USA#	2015	StudioCanal
9	Kenny	UK	2017	Spirit Entertainment
10	Their Finest	UK	2017	Lionsgate

Source: BFI RSU analysis of Official Charts Company data

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

As Table 4 shows, all of the top 10 best-selling feature documentaries on physical video in 2017 were films about sport or sports personalities. (This list does not include documentaries which are based on music concerts.) The table is headed by *Kenny*, a biography of Kenny Dalglish, who played for and managed Liverpool FC over three decades. There are three other football-related films in the list: *89*, a film about Arsenal's odds-defying 1989 championship title win over Liverpool, *Best* and *Bobby*, respectively biographies of footballers George Best and Bobby Moore. While five of the six remaining titles centre on male sporting personalities in the worlds of mixed martial arts (*Conor McGregor: Notorious*), Formula One (*McLaren, Williams*), bare-knuckle fighting (*The Guv'nor*) and motorcycle road racing (*Road*), one title tells the story of a 13-year-old Mongolian girl's attempt to become the first female eagle hunter in 12 generations of her family (*The Eagle Huntress*).

Three of the films in the list also appeared in the 2016 top 10 list: *The Guv'nor, Road* and *Bobby*. Eight of the top 10 documentaries are UK films.

Table 4 Top 10 best-selling documentary films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Kenny	UK	2017	Spirit Entertainment
2	Conor McGregor: Notorious	Ire	2017	Universal
3	89	UK	2017	Universal
4	McLaren	NZ	2017	Universal
5	Williams	UK	2017	Curzon Artificial Eye
6	The Guv'nor	UK	2016	Lionsgate
7	Best (George Best - All by Himself)	UK	2017	Dogwoof
8	The Eagle Huntress	UK/Mongolia/USA	2016	Altitude
9	Road	UK/Ire	2014	Kaleidoscope
10	Bobby	UK	2016	eOne Films

Source: BFI RSU analysis of Official Charts Company data

Note: Titles based on music concerts are not included.

Films from East Asia accounted for seven of the top 10 best-selling foreign language films on video in 2017. The list is headed by the South Korean WWII epic *Operation Chromite* (in Korean and English) which features Liam Neeson as General Douglas MacArthur. There are two other South Korean titles in the list: the zombie horror film *Train to Busan*, the highest earning film at the South Korean box office in 2016, and *The Handmaiden*, which won the BAFTA award for best foreign language film in 2018. Four of the films in the top 10 are Japanese, all of which are animations. The highest earning Japanese title in the list is Makoto Shinkai's *Your Name*, which is globally the highest earning anime film of all time.

Two of the titles have featured in the top 10 in previous years: *My Neighbour Totoro* appears in the top 10 for a third consecutive year, while *When Marnie Was There* appears for a second consecutive year.

Table 5 Top 10 best-selling foreign language films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Operation Chromite	S.Kor	2016	Signature Entertainment
2	Your Name	Jpn	2016	Anime
3	Guardians	Rus	2017	4Digital Media
4	Train to Busan	S.Kor	2016	StudioCanal
5	The Handmaiden	S.Kor	2017	Curzon Artificial Eye
6	My Neighbour Totoro	Jpn	1988	StudioCanal
7	Yu-Gi-Oh!: The Dark Side of Dimensions	Jpn	2017	Manga
8	When Marnie Was There	Jpn	2016	StudioCanal
9	The Butcher of Prague	Cze/Slk	2011*	Lightning Pictures
10	William the Conqueror	Fra	2017*	Precision Pictures

Source: BFI RSU analysis of Official Charts Company data

* *The Butcher of Prague* and *William the Conqueror* were not released theatrically in the UK; the theatrical release year refers to the first release in any global territory.

Classic and archive titles also remain popular video purchases, due in part to theatrical re-releases or other events associated with the films. The year's highest video sales for any film over 10 years old were achieved by Danny Boyle's 1996 cult classic *Trainspotting*, due largely to the interest generated by the theatrical release of its sequel *T2 Trainspotting*. In addition, the Walt Disney animations *Beauty and the Beast, Cinderella, The Jungle Book, The Lion King, The Little Mermaid* and *Snow White and the Seven Dwarfs* all sold well on video in 2017, helped in part by a prolonged promotion with major retailers and also, in the case of *Beauty and the Beast*, by the successful theatrical release of a live action remake.

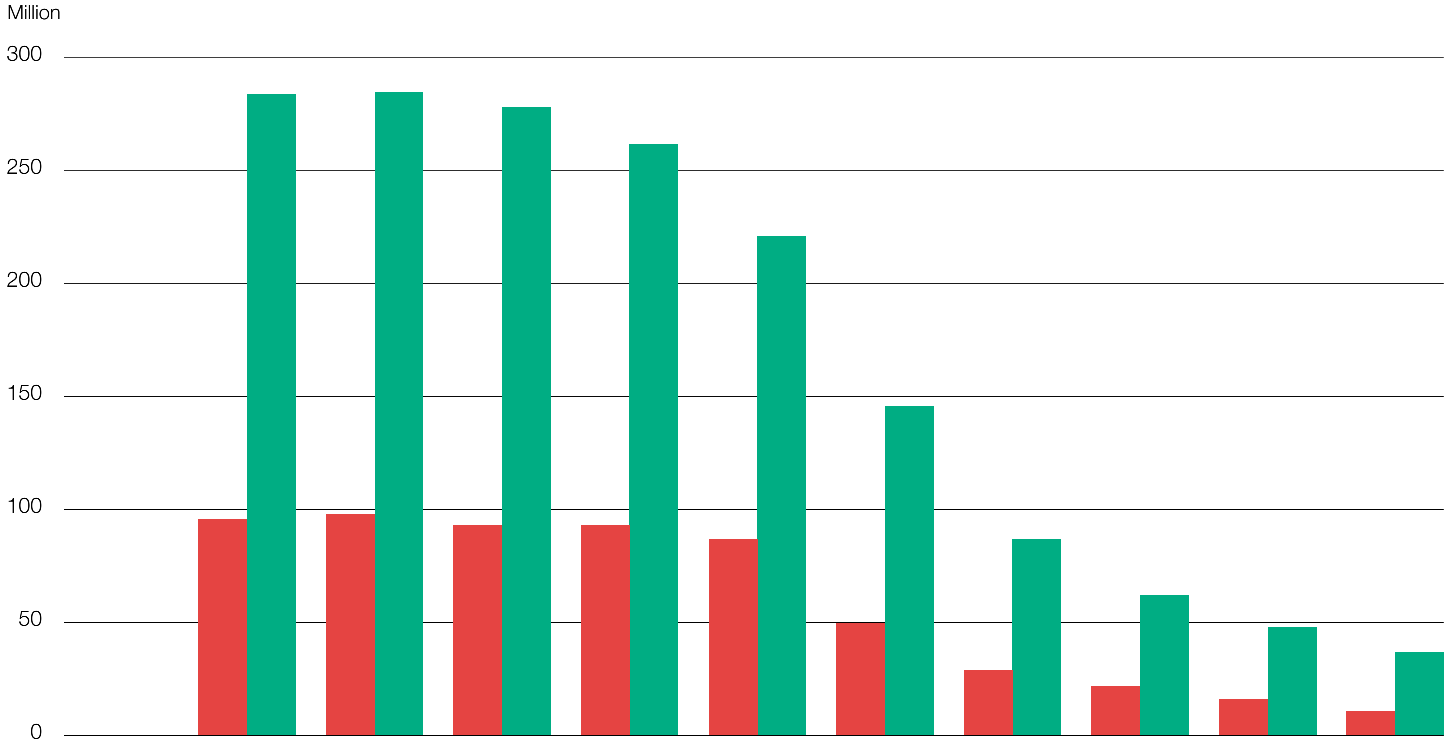
Image: *T2 Trainspotting* © Tristar Productions, Inc 2017. Courtesy of Sony Pictures

FILM IN THE PHYSICAL VIDEO RENTAL MARKET

As with the sell-through market, there has been a downward trend in physical video rentals over the 10-year period 2008-2017 (Figure 5). At £37 million, the value of the market in 2017 was nearly six times lower than in 2008 (£284 million), while rental transactions were down 31% from 16 million in 2016 to 11 million in 2017. The decrease in the market's value over the decade is due mainly to competition from multi-channel television and digital video services such as Netflix, Amazon Prime and Google Play.

The average price of a physical video rental in 2017 was £3.33, and online renting of physical discs (with postal delivery) accounted for 82% of rental transactions.[1] (In October 2017, Lovefilm, the UK's largest physical disc rental operator ceased its rental by post system.) Data produced by Kantar for BASE shows that the rental market is increasingly driven by male consumers (75%) and older age groups, with only 1% of 20-24 year olds in 2017 renting a physical video compared to 17% of 45-54 year olds and 16% of 55-64 year olds.

Figure 5 Film on physical video rental market, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Transactions (million)	96	98	93	93	87	50	29	22	16	11
Value (£ million)	284	285	278	262	221	146	87	62	48	37

Source: IHS, BASE

[1]Due to declining volumes, information on the top 10 online film video rentals and a breakdown of rentals by genre are not available.

FILM ON DIGITAL VIDEO

Digital video has revolutionised the ways in which audiences can access film by making content available through a range of devices, anytime, anywhere. The sector has grown rapidly in recent years and is now firmly established as a major contributor to the UK film economy.

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

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

- Transactional (TVoD) which comprises:
  rental digital video, a one-off rental for a limited time, including both streaming and Download to Rent (DTR); 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 provides unlimited access to content for a fixed monthly sum – providers include Netflix, Amazon Prime Video and Now TV
- Free/advert-supported – providers include YouTube (excluding YouTube Premium) and catch-up services from the major broadcasters such as BBC iPlayer and ITV Hub.

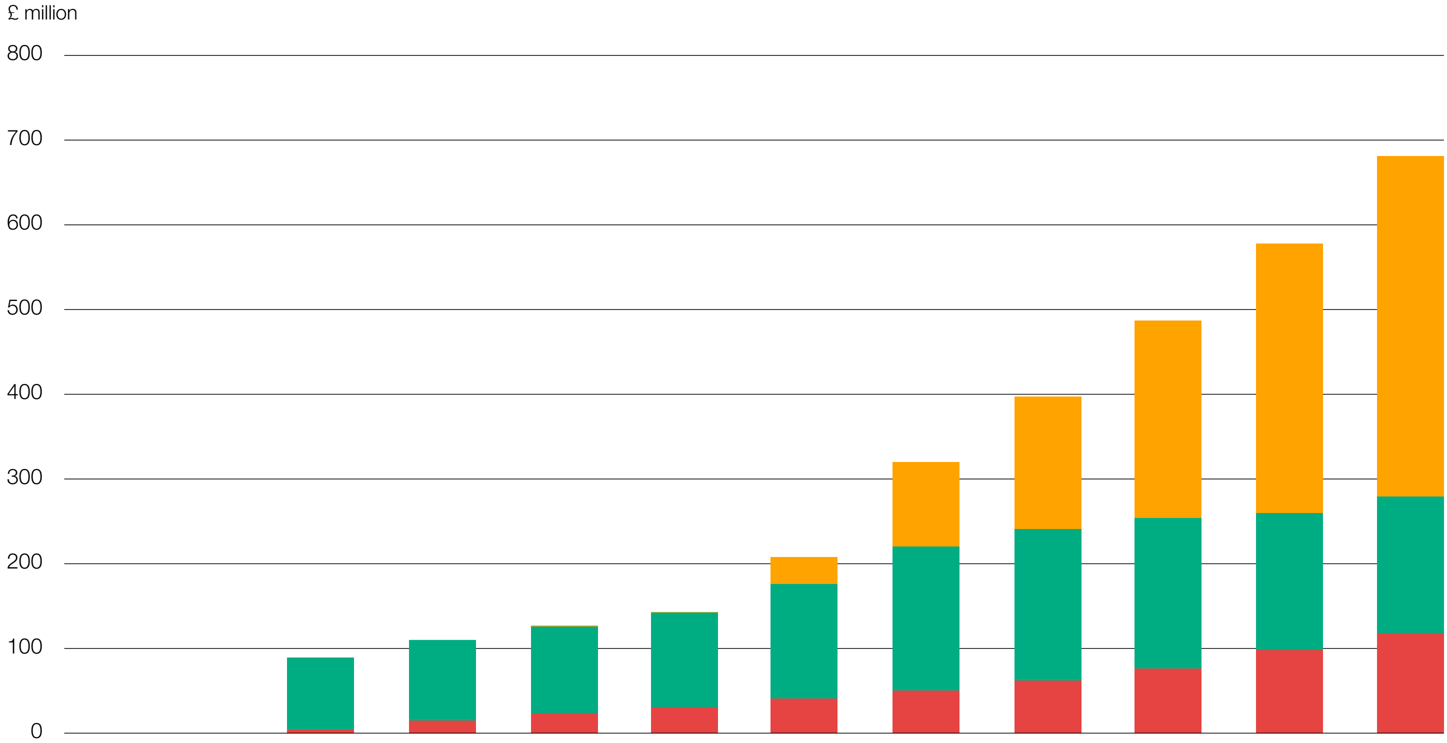
VALUE OF FILM ON DIGITAL VIDEO

According to IHS, the estimated value of the on-demand market for film in the UK in 2017 was £681 million, an increase of 18% compared with 2016 and more than seven times the value in 2008 (Figure 6). In previous editions of the Yearbook we have presented separate values for television-based and online digital video revenues but these are no longer disaggregated.

In 2017, revenues from SVoD platforms are estimated to have been £402 million, an increase of 26% compared with 2016 (£318 million). Overall TVoD revenues were also up compared with 2016 but only due to increases in retail sales: EST revenues in 2017 are estimated to have been £118 million, up 20% compared with 2016 (£98 million), while revenues from rental VoD services are estimated at £161 million, a slight drop from £162 million in 2016. (Revenues from SVoD services have been greater than those of rental VoD since 2015.)

The value of the overall on-demand film market represented approximately 20% of the total UK filmed entertainment market in 2017, an increase of three percentage points on the previous year. For the first time, digital video revenues overtook those of physical video (see Film on physical video section above).

Figure 6 Estimated value of the digital video film market in the UK, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
EST	4	15	24	31	41	50	62	76	98	118
VoD (rental)	85	95	102	111	135	170	179	178	162	161
SVoD (subscription)	-	-	1	1	32	100	156	233	318	402
Total	**89**	**110**	**127**	**142**	**208**	**320**	**397**	**487**	**578**	**681**

Source: IHS

Notes:

IHS estimates for 2008-2016 have been revised due to improved visibility on transactions and revenues.

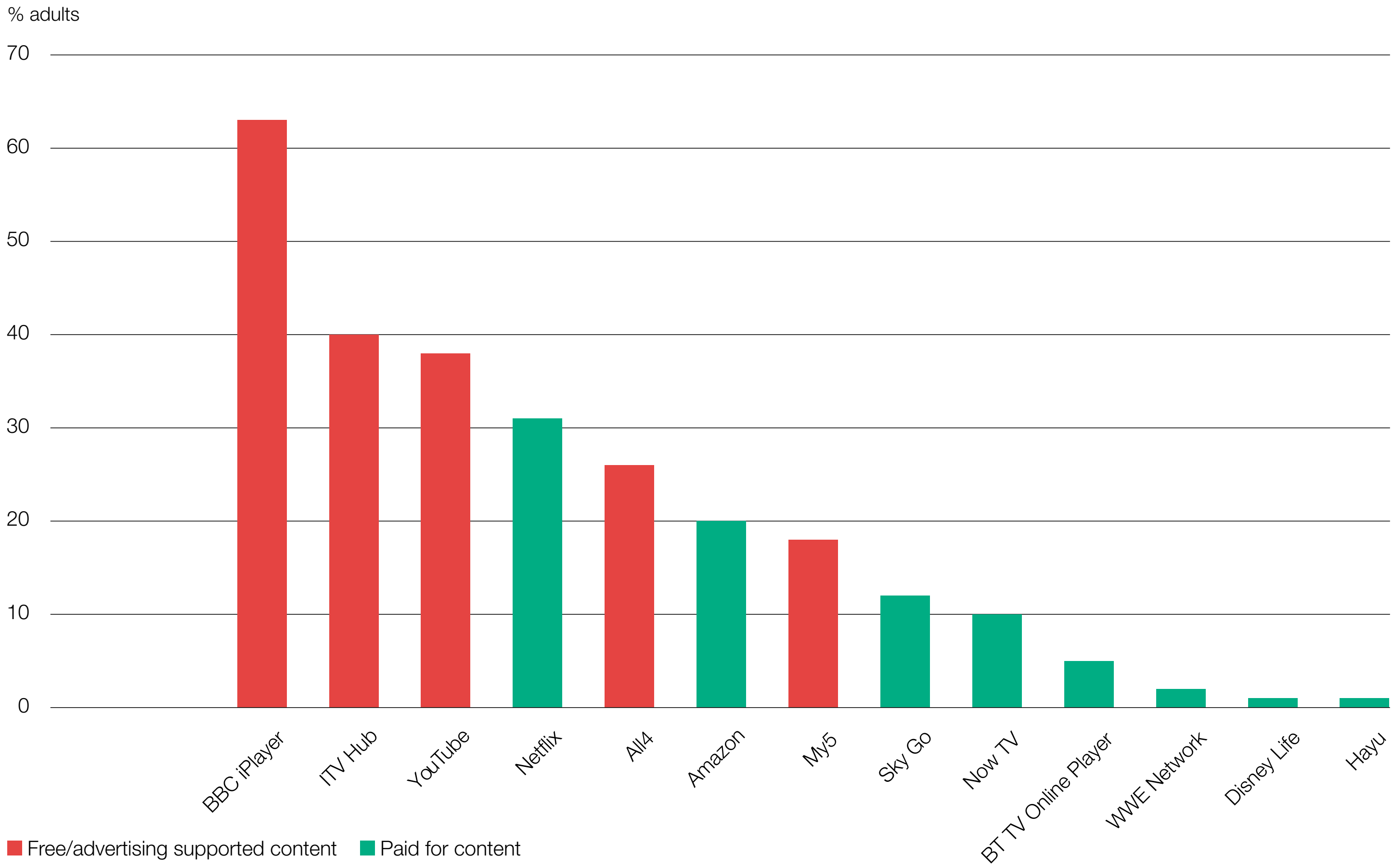
Estimates include both television-based and online digital video revenues.

Figures may not sum to totals due to rounding.

POPULARITY OF ON-DEMAND STREAMING SERVICES

According to Ofcom's *Communications Market Report*, amongst adults (16+), the top two most popular on-demand streaming services for film and television programmes in 2017 were the BBC iPlayer (used by 63%) and ITV Hub (40%) platforms offered by terrestrial broadcasters. Netflix (used by 31% of adults) was the most popular OTT SVoD service, while the pay TV platform Sky Go was used by 12% of UK adults (Figure 7).

Figure 7 Most popular on-demand streaming services for film and television programmes, 2017



Adults (16+) %	63	40	38	31	26	20	18	12	10	5	2	1	1

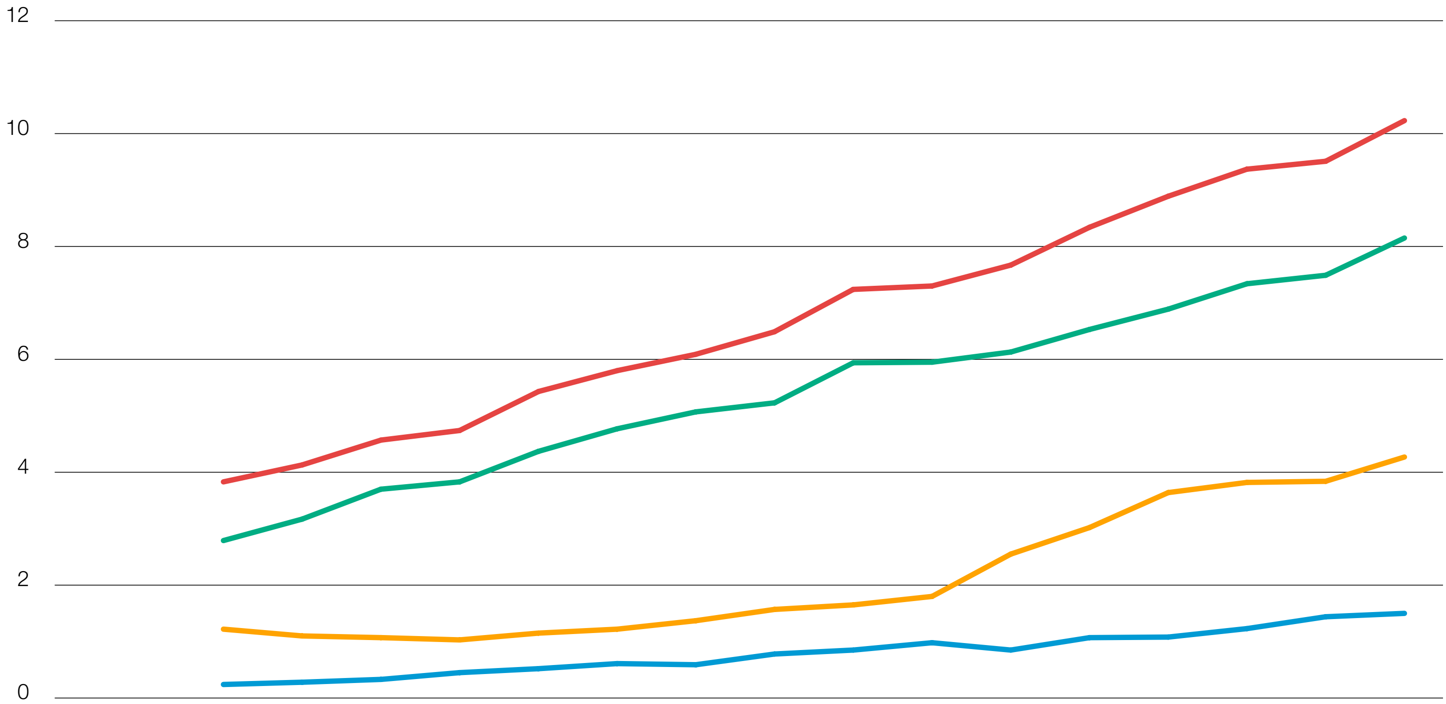
Source: Ofcom Communications Market Report, Consumption of VoD content CMR Research 2017 – Populus
Q: Thinking about when you watch TV programmes/films, do you use any of the following? n=2,356

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 8 shows, the number of households with access to these services increased from 3.8 million in Quarter 1, 2014 to 10.2 million in Q4, 2017, 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 Quarter 4, 2017, Netflix was available in 8.2 million UK homes, Amazon Prime Video in 4.3 million homes, and Now TV in 1.5 million homes. (For more on SVoD audiences, see the Audiences chapter.)

Figure 8 UK SVoD households, Q1 2014 – Q4 2017

Millions of households



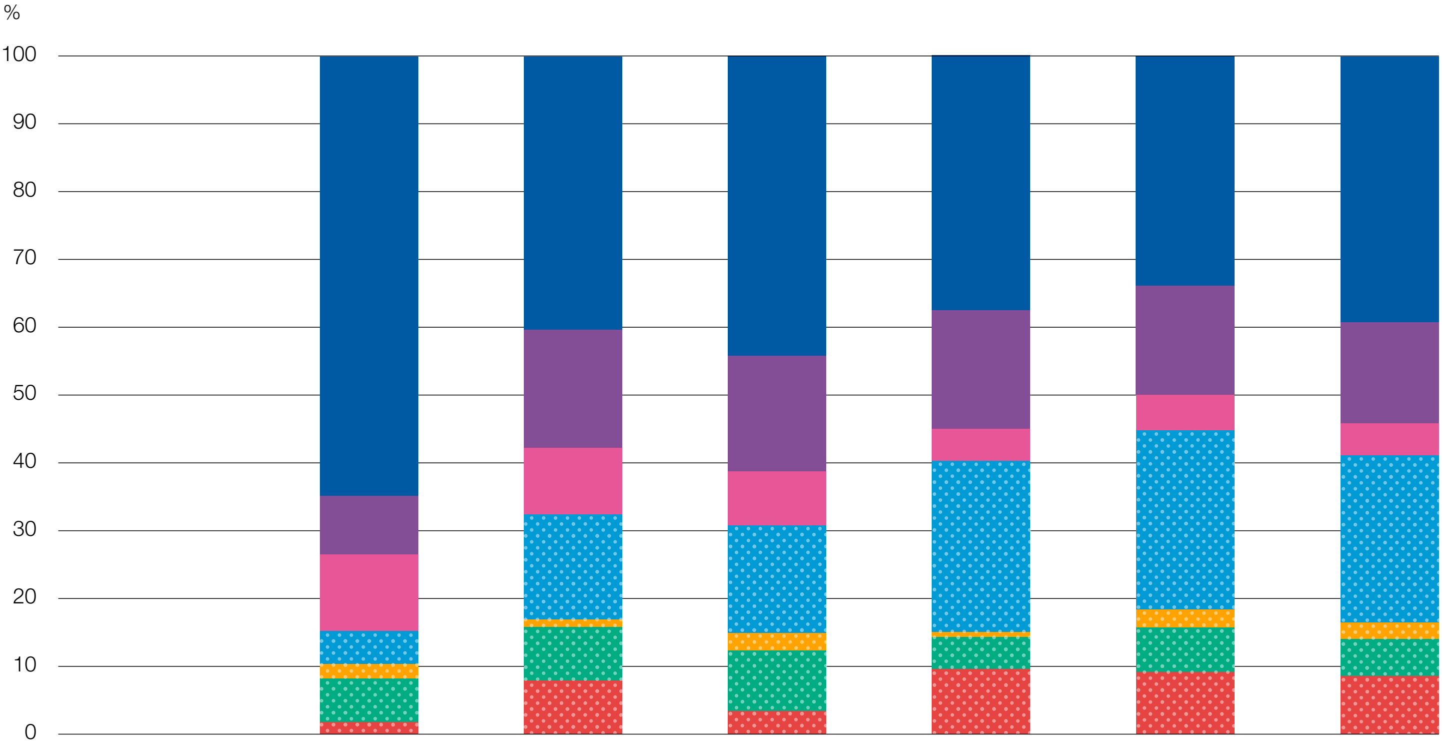
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Any SVoD	3.83	4.13	4.57	4.74	5.43	5.80	6.09	6.49	7.24	7.30	7.67	8.34	8.89	9.37	9.51	10.23
Netflix	2.79	3.17	3.70	3.83	4.37	4.77	5.07	5.23	5.94	5.95	6.13	6.53	6.89	7.34	7.49	8.15
Amazon	1.22	1.10	1.07	1.03	1.15	1.22	1.37	1.57	1.65	1.80	2.55	3.02	3.64	3.82	3.84	4.27
Now TV	0.24	0.28	0.33	0.45	0.52	0.61	0.59	0.78	0.85	0.98	0.85	1.07	1.08	1.23	1.44	1.50

Source: BARB Establishment Survey, RSU analysis

As the overall number of subscriptions to UK SVoD services have increased, so too have the number of households opting to sign up to more than one platform. According to BARB Establishment Survey data, by Quarter 1, 2018, 11.1 million households had access to one or more of the top three SVoD services, representing over 39% of all homes in the UK.

Figure 9 shows the overlap of services amongst subscribers to Amazon, Netflix and Now TV between 2015 and 2018. (This is the only data currently available on multiple subscriptions.) The most likely combination for households holding more than one subscription was Amazon and Netflix. The growth in dual – and even triple – subscriptions was particularly evident in Q1, 2017 which points to the impact of the launch of two UK-originated series during Q4, 2016 - *The Crown* on Netflix and *The Grand Tour* on Amazon. As the data shows, the proportion of subscriptions to both services increased by 10 percentage points compared with the pre-launch quarter (Q3, 2016).

Figure 9 UK SVoD subscriptions overlap, Amazon, Netflix and Now TV, 2015-2018



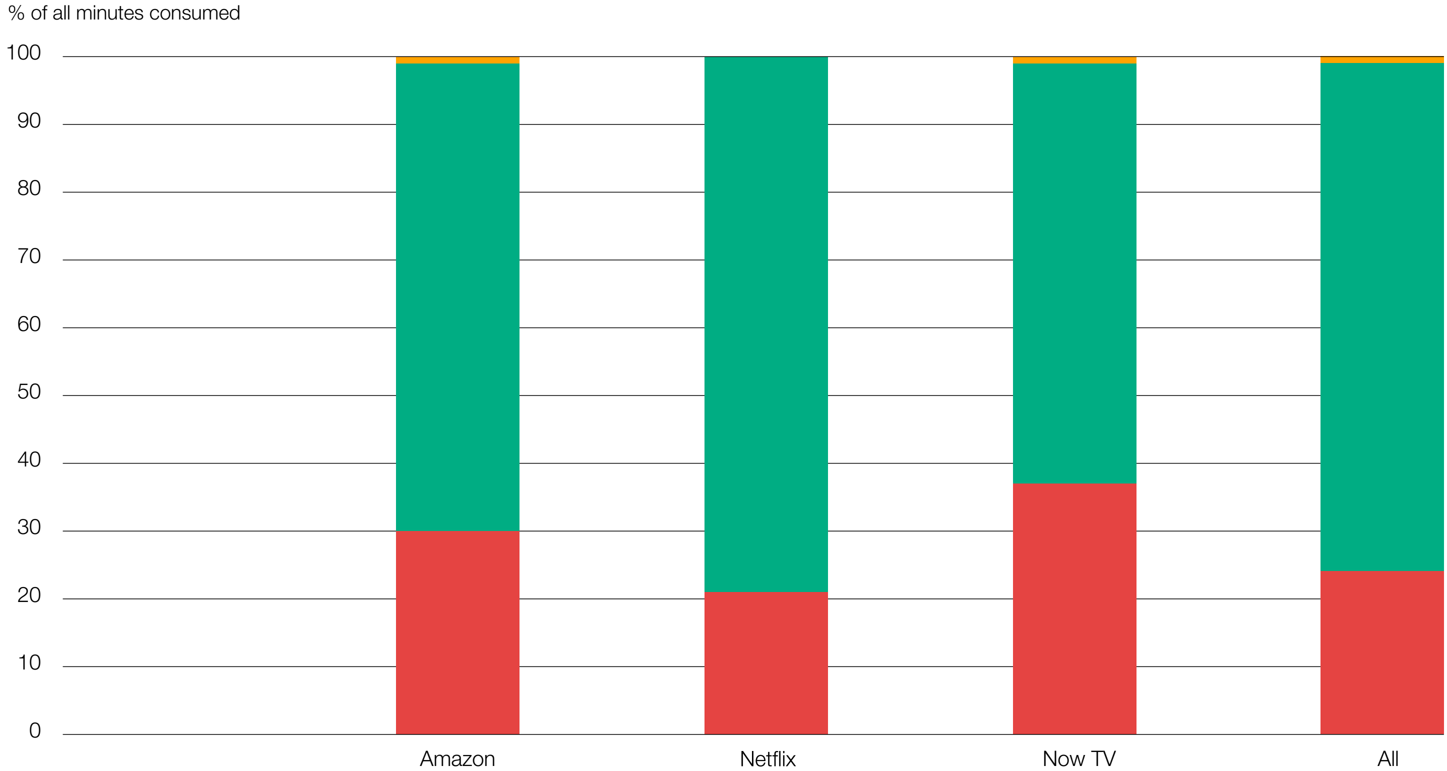
multiple subscribers	Q3,2015	Q1, 2016	Q3, 2016	Q1, 2017	Q3, 2017	Q1 2018
Netflix, Amazon & Now TV	1.8	7.9	3.4	9.6	9.2	8.6
Now TV & Netflix	6.4	7.9	8.9	4.7	6.5	5.4
Amazon & Now TV	2.1	1.1	2.6	0.8	2.7	2.5
Amazon & Netflix	4.9	15.5	15.9	25.2	26.4	24.6
Now TV only	11.3	9.8	7.9	4.7	5.2	4.7
Amazon only	8.6	17.4	17.1	17.5	16.1	14.9
Netflix only	64.8	40.3	44.2	37.6	33.9	39.2

Source: Ampere Consumer, UK online survey. Base: 18+ (2,000) nationally representative

THE AUDIENCE FOR FILM ON SVoD

The provision of film content has been central to the on-demand offer. Figure 10 shows the share of viewing time devoted to film vs television programmes by subscribers to the three main SVoD platforms compared with all SVoD users. On average, subscribers to SVoD platforms in the UK devote just under one quarter (24%) of their total viewing time to watching films. Amongst the top three providers, Now TV subscribers spend the largest share of their viewing time watching films (37%) while Netflix subscribers spend the smallest (21%). It is interesting to note that when Now TV launched in 2012 it was a provider of exclusively film content.

Figure 10 Share of viewing by content on UK SvoD platforms, 2017



	Amazon	Netflix	Now TV	All
Film	30	21	37	24
TV series	69	79	62	75
Other TV	1	0	1	1

Source: GfK, UK SVoD Tracker, Calendar 2017, All adults 18+ who use SVoD platforms at least once every two weeks, Base: All (9,906), Amazon (5,554), Netflix (7,698), Now TV (2,225)

Note: Other TV includes non-series television productions, such as single dramas and one-off specials.

TOP FILMS ON SVoD

Table 6 lists the top 20 most popular films viewed on the three largest SVoD platforms in 2017. It should be noted, however, 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.

The list is headed by *The King's Speech*, the all-time highest grossing UK independent film at the global box office, which was available on both Netflix and Amazon Prime. Interestingly, it is possible that the popularity of the film in 2017 may in part be due to Netflix's recommendation algorithms which are likely to have suggested the title to viewers of the platform's original series, *The Crown*, which was the fourth most viewed title on Netflix overall in the year. *The King's Speech* is the only UK independent film to feature in the list and is the oldest title (it was released in UK cinemas in 2011). The remaining top 20 films were all released theatrically between 2014 and 2016 with the exception of *Bright*, an original Netflix production, which was released directly on the platform in December 2017.

Table 6 Top 20 films viewed on leading UK SVoD platforms, 2017 (ranked by minutes consumed)

Rank	Title	% share of total film minutes consumed	Country of origin	Genre	Year of theatrical release
1	The King's Speech	1.0	UK	Drama	2011
2	Transformers: Age of Extinction	0.7	USA/Chn	Sci-fi	2014
3	London Has Fallen	0.7	UK/USA	Action	2016
4	Fast & Furious 7	0.6	USA/Jpn	Action	2015
5	Jurassic World	0.5	USA	Action	2015
6	John Wick	0.5	USA	Action	2015
7	Fifty Shades of Grey	0.4	USA	Drama	2015
8	The BFG	0.4	USA	Family	2016
9	Bright*	0.4	USA	Fantasy	-
10	Avengers: Age of Ultron	0.4	UK/USA	Action	2015
11	Interstellar	0.4	UK/USA	Sci-fi	2014
12	The Hunger Games: Mockingjay - Part 2	0.4	USA	Adventure	2015
13	Star Trek Into Darkness	0.3	USA	Sci-fi	2013
14	Divergent	0.3	USA	Action	2014
15	Moana	0.3	USA	Animation	2016
16	The Girl on the Train	0.3	USA	Thriller	2016
17	Minions	0.3	USA/Fra	Animation	2015
18	Guardians of the Galaxy	0.3	UK/USA	Action	2014
19	Gone Girl	0.3	USA	Drama	2014
20	Star Wars: The Force Awakens	0.3	UK/USA	Sci-fi	2015

Source: RSU, GfK, UK SVoD Tracker, Calendar 2017, claimed viewership on Amazon Prime, Netflix or Now TV
* Film was released directly on the Netflix platform without a prior cinema release.

FILM ON TELEVISION

Despite increased competition from on-demand providers of film content, in terms of viewer numbers television remains the single most important platform for film consumption in the UK. Viewers had a choice of over 7,000 unique film titles across all channels in 2017, and the cumulative film audience was over 3.7 billion.

PROGRAMMING ON THE TERRESTRIAL CHANNELS

Table 7 shows the total number of feature films broadcast on the five terrestrial channels in 2017 and the number of UK titles broadcast in that time. (Terrestrial television is used here to describe the previous national terrestrial analogue services, all of which have some degree of public service obligation.) UK films are broken down into recent titles (films released in the last 10 years) and older titles (more than 10 years old). Here, UK films include all titles listed as UK originated by the Broadcasters' Audience Research Board (BARB), plus UK qualifying films given other nationalities (mostly USA) in the BARB data.

There were 1,666 film transmissions on terrestrial television in 2017, up from 1,528 in 2016, an average of just over four and a half films a day. One fifth (20%) of the films shown were UK titles. BBC Two broadcast the greatest number of films overall (435) as well as the greatest number of UK films and recent UK films, with 144 and 67 transmissions respectively. As a percentage of overall films shown, however, ITV had the highest share of UK films (38%).

Table 7 Feature films broadcast[1] on terrestrial television 2017

	Number of films broadcast	Number of UK films broadcast	UK films as % of total	Number of recent UK films broadcast[2]	Recent UK films as % of total films broadcast
BBC One	230	28	12.2	21	9.1
BBC Two	435	144	33.1	67	15.4
ITV	177	67	37.9	11	6.2
Channel 4	430	65	15.1	46	10.7
Channel 5	394	33	8.4	7	1.8
Total	**1,666**	**337**	**20.2**	**152**	**9.1**

Source: BARB, BFI RSU analysis

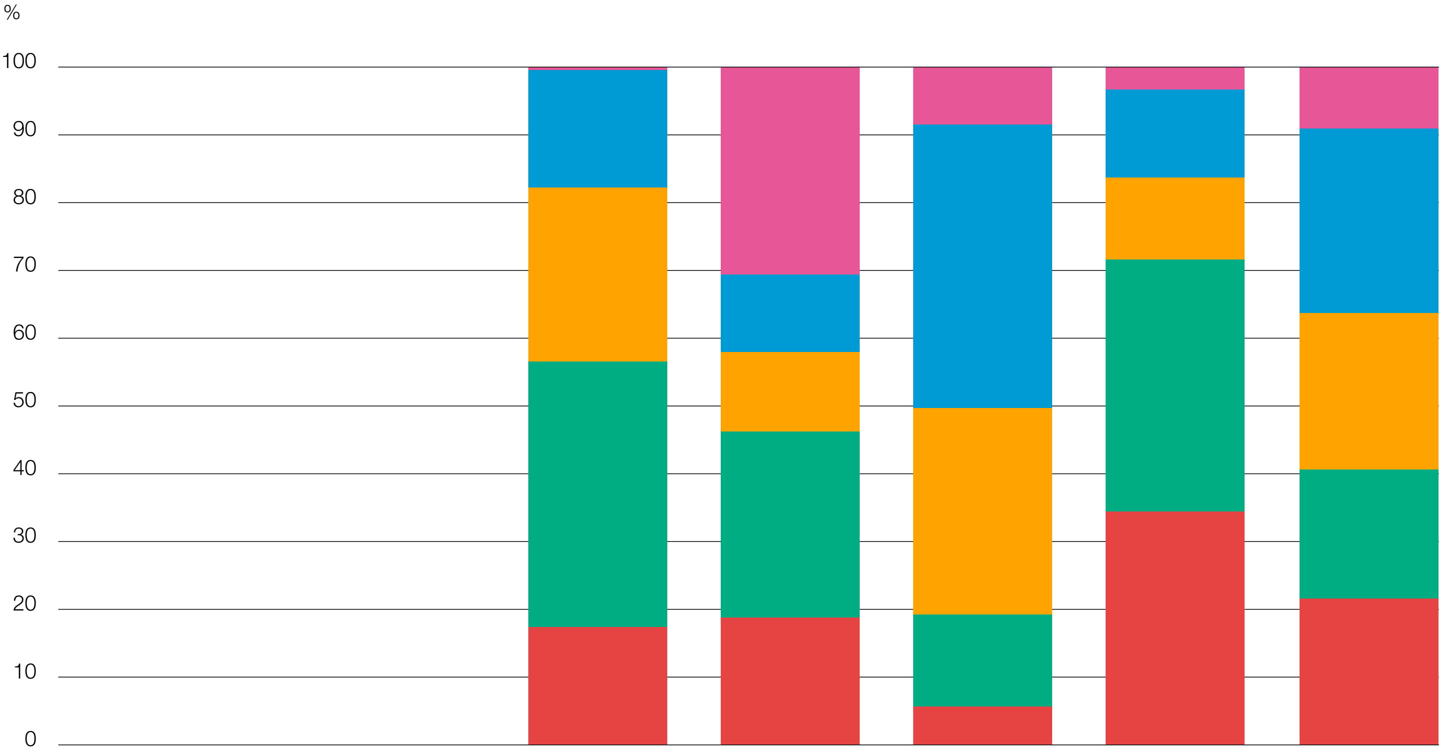
[1] Includes repeat broadcasts of individual titles.

[2] A recent film is one which has been theatrically released, or intended for release, in the UK since 2008.

Figure 11 shows the percentage of films broadcast on the terrestrial channels in 2017 across five age categories. (For this analysis, the age of a film is determined by its year of release in the UK, not production year.) Due to a change in data suppliers we are not able to analyse the number of network premieres in this edition of the Yearbook.

Recent titles made up a larger share of Channel 4's film output than for the other terrestrial channels. Over one third (34%) of the films shown by Channel 4 were less than five years old and 72% of its films were less than 10 years old. At the other end of the scale, 50% of the films shown on ITV had been released at least 20 years before, while 30% of the films screened on BBC Two were at least 50 years old. In the case of BBC Two, many of the film titles shown over the year were Hollywood and British classics from the 1940s and 1950s.

Figure 11 Percentage of feature film by age on terrestrial channels, 2017



	BBC One	BBC Two	ITV	Channel 4	Channel 5
Less than 5 years	17.4	18.8	5.6	34.4	21.6
5-9 years	39.1	27.4	13.6	37.2	19.0
10-19 years	25.7	11.8	30.5	12.1	23.1
20-49 years	17.4	11.4	41.8	13.0	27.2
50+ years	0.4	30.6	8.5	3.3	9.1

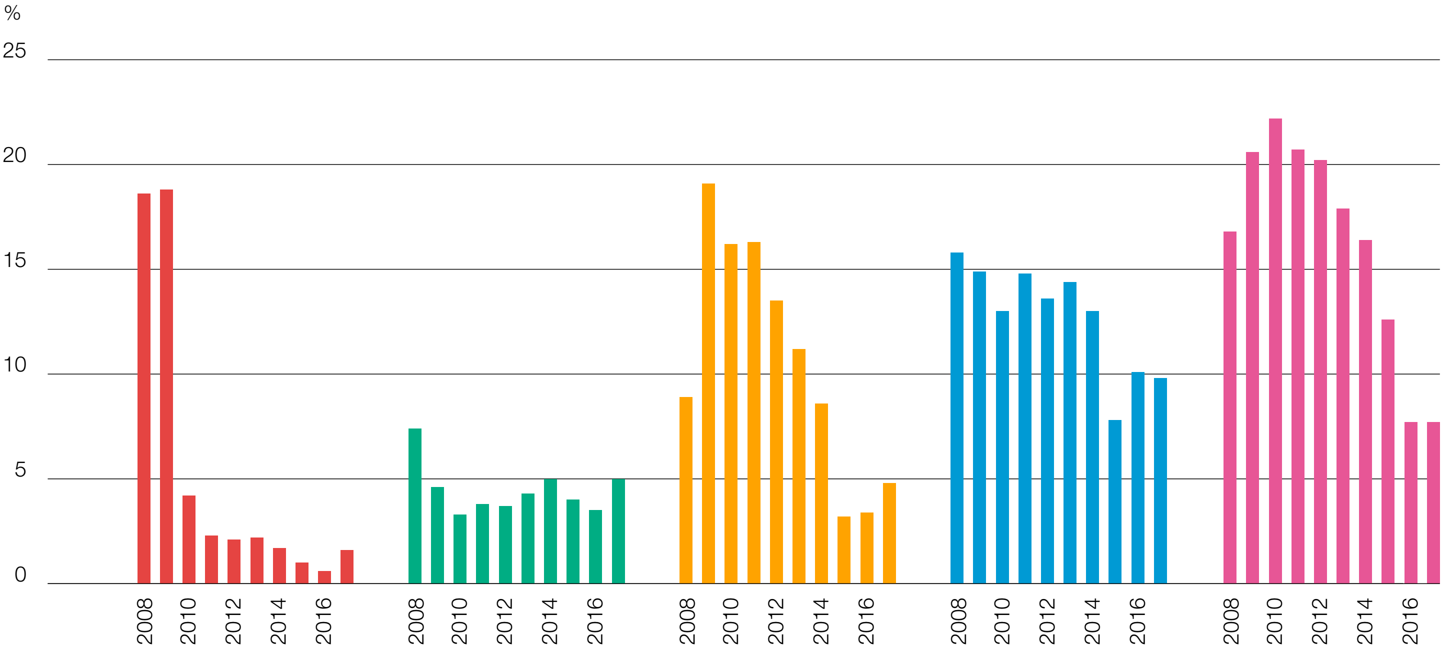
Source: BARB, BFI RSU analysis

FILM ON PEAK TIME TERRESTRIAL TELEVISION, 2008-2017

The proportion of peak time hours (18:00 to 23:00 hours) dedicated to feature film varied widely across the terrestrial channels between 2008 and 2017 (Figure 12). Channel 4 and Channel 5 showed the greatest number of films in peak time hours over the decade.

In 2017, 10% of Channel 4's peak time output was feature film, followed by 8% of Channel 5 programming and 5% of both BBC Two and ITV output. For the seventh consecutive year, BBC One had the lowest proportion of peak time hours dedicated to film (1.6%). Overall, the share of peak time hours used to show film on terrestrial channels increased from 5% in 2016 to 6% in 2017.

Figure 12 Film as a percentage of peak time programming hours by channel, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
BBC One	18.6	18.8	4.2	2.3	2.1	2.2	1.7	1.0	0.6	1.6
BBC Two	7.4	4.6	3.3	3.8	3.7	4.3	5.0	4.0	3.5	5.0
ITV	8.9	19.1	16.2	16.3	13.5	11.2	8.6	3.2	3.4	4.8
Channel 4	15.8	14.9	13.0	14.8	13.6	14.4	13.0	7.8	10.1	9.8
Channel 5	16.8	20.6	22.2	20.7	20.2	17.9	16.4	12.6	7.7	7.7

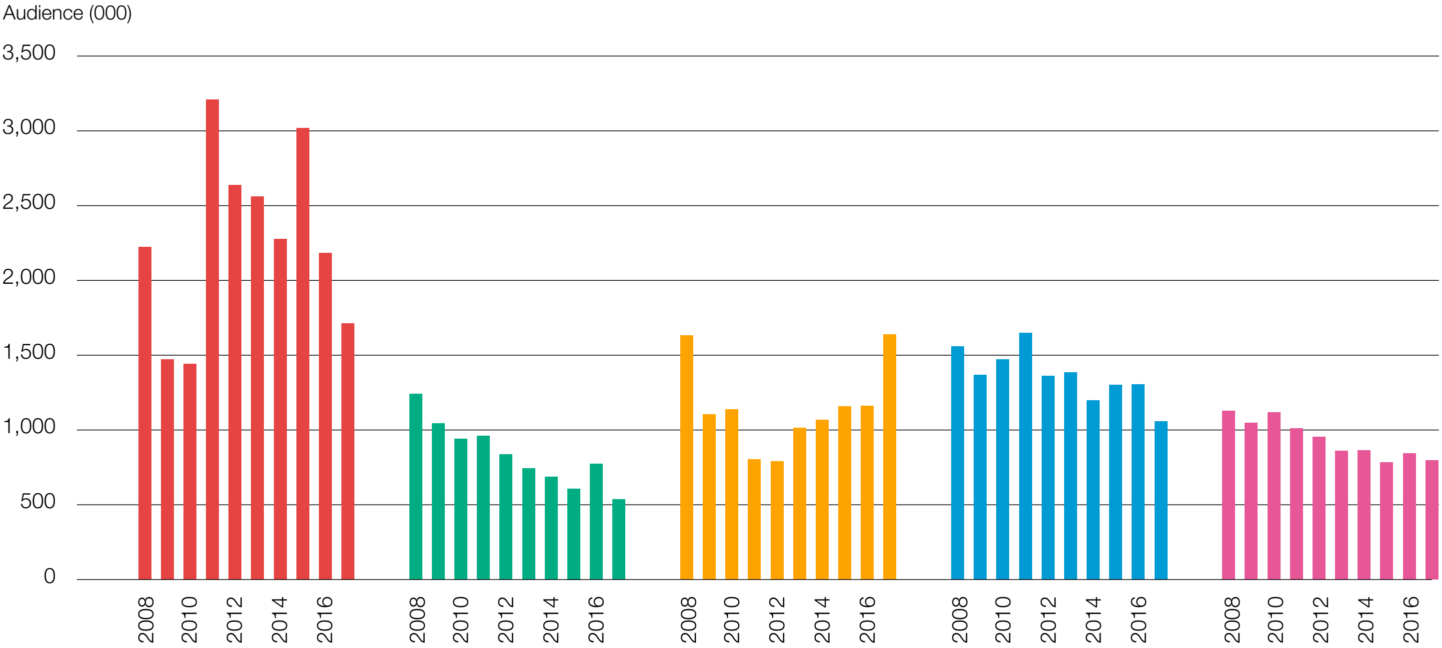
Source: BARB

AUDIENCES FOR FILM ON PEAK TIME TERRESTRIAL TELEVISION

As Figure 13 shows, the average peak time audience for film in 2017 was lower for four of the five terrestrial channels compared to 2016. (This data differs from that in the 2017 Yearbook due to a change in data suppliers and the methodology used to calculate peak time audience share.)

The general trend across the channels has been gradual year-on-year decreases in the average viewership, which is partly attributable to the growth of competition from on-demand services during the period. BBC One had the highest average audience throughout the decade, while BBC Two generally had the lowest. In 2017, peak time films on BBC One attracted an average of 1.7 million viewers (from 230 transmissions), ITV averaged 1.6 million viewers (from 177 transmissions) and Channel 4 averaged 1.0 million viewers (from 430 transmissions).

Figure 13 Average audience for peak time film, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
BBC One	2,223	1,472	1,441	3,210	2,638	2,561	2,278	3,017	2,184	1,712
BBC Two	1,242	1,043	939	961	837	744	687	608	772	535
ITV	1,632	1,104	1,137	803	790	1,015	1,068	1,156	1,160	1,640
Channel 4	1,557	1,367	1,473	1,647	1,360	1,386	1,197	1,300	1,306	1,058
Channel 5	1,129	1,046	1,118	1,010	953	861	864	784	844	797

Source: BARB
Note: Figures for 2008-16 have been revised since publication of the 2017 Yearbook.

TOP FILMS ON TERRESTRIAL TELEVISION

Jurassic World was the most popular film shown on terrestrial television in 2017 attracting an audience of 6.3 million viewers for its Boxing Day screening on ITV (Table 8). It was one of six films in the top 10 to premiere on the terrestrial channels during the year (the films in the list shown for a second time or more were the Harry Potter titles and *Monsters University*). The final film in the Harry Potter series appears in the list twice for separate transmissions in August and December.

In total, three films in the list achieved audiences of more than four million viewers compared with nine in the top 10 list for 2016. Seven of top 10 films in 2017 were US-studio backed UK productions and one was an independent UK title.

Table 8 Top 10 films[1] on terrestrial television, 2017

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Jurassic World	ITV	USA	2015	6.3
2	Far from the Madding Crowd	BBC One	UK/USA#	2015	4.9
3	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	4.1
4	Guardians of the Galaxy	BBC One	UK/USA	2014	3.9
5	Cinderella	BBC One	UK/USA	2015	3.9
6	Monsters University	BBC One	USA	2013	3.7
7	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	3.5
8	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.5
9	Avengers: Age of Ultron	BBC One	UK/USA	2015	3.4
10	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	3.4

Source: BARB

[1] Films with the highest audience figure for an individual transmission.

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

The top 10 most popular UK films on terrestrial television in 2017 include eight titles which also appear in the year's overall top 10 films (Table 9). Four of the films in the list were network premieres, including the most watched title *Far from the Madding Crowd* which attracted an audience of 4.9 million viewers. As in the previous four years, the Harry Potter franchise features strongly in the list with six entries. Two of the Harry Potter titles appear in the list twice for separate transmissions in August and December. *Far from the Madding Crowd* is the only independent UK film in the list.

Table 9 Top 10 UK qualifying films[1] on terrestrial television, 2017

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Far from the Madding Crowd	BBC One	UK/USA#	2015	4.9
2	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	4.1
3	Guardians of the Galaxy	BBC One	UK/USA	2014	3.9
4	Cinderella	BBC One	UK/USA	2015	3.9
5	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	3.5
6	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.5
7	Avengers: Age of Ultron	BBC One	UK/USA	2015	3.4
8	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	3.4
9	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	3.4
10	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.3

Source: BARB
[1] Films with the highest audience figure for an individual transmission.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

As shown in the table above, the most popular UK film broadcast on terrestrial television in 2017 was the independent UK title *Far from the Madding Crowd*. The Thomas Hardy adaptation is one of four premieres in the top 10 most popular independent UK films list (Table 10). The list contains more first-run titles than either of the two previous top 10s and the largest share of most recent films: nine of the top 10 films were released in the cinema in either 2014 or 2015.

Table 10 Top 10 independent UK films[1] on terrestrial television, 2017

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Far from the Madding Crowd	BBC One	UK/USA#	2015	4.9
2	Shaun the Sheep the Movie	BBC Two	UK/Fra	2015	2.1
3	Paddington	Channel Four	UK/Fra	2014	2.0
4	What We Did on Our Holiday	BBC Two	UK	2014	1.7
5	The Second Best Exotic Marigold Hotel	Channel Four	UK/USA#	2015	1.7
6	The Lady in the Van	BBC One	UK/USA#	2015	1.6
7	Legend	Channel Four	UK/Fra/USA#	2015	1.5
8	Trainspotting	Channel Four	UK	1996	1.4
9	Testament of Youth	BBC Two	UK/Nor	2014	1.3
10	Effie Grey	BBC Two	UK	2014	1.3

Source: BARB
Notes:
[1] UK independent films with the highest audience figure for an individual transmission.
Film made with independent (non-studio) US support.

FILM ON MULTI-CHANNEL TELEVISION

In 2017, multi-channel television (freeview/satellite/cable) accounted for 46% 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 11 lists the number of films broadcast, the average audience, the top film and the audience for the top film, for a selection of channels or suites of channels which broadcast feature films. After dedicated film channels Talking Pictures (just under 4,000 films) Film4 (over 2,800 films) and TCM (just over 2,700 films), the highest number of titles was screened by a suite of ITV channels (CITV and ITV2-4) with over 2,500 films. BBC Four and CBBC, which together broadcast only 54 films over the year, had the highest average audience at 211,000 viewers.

In total, 5,147 unique titles were screened on multi-channel television in 2017 across 27,098 slots, compared with 3,625 unique titles across 17,163 slots in 2016, a rise of 41%. For the third consecutive year, *Skyfall* recorded the largest audience for a single broadcast on the platform, attracting just over 1.2 million viewers for its Christmas Day screening on ITV2.

Table 11 Feature films on multi-channel television, 2017

Channel	Number of films broadcast	Average audience (000)	Top film (channel)	Audience for top film (000) [1]
Talking Pictures	3,952	11	House on Haunted Hill	93
Film4	2,854	148	Kingsman: The Secret Service	1,145
TCM	2,707	14	Sherlock Holmes: A Game of Shadows	111
CITV, ITV2, ITV3, ITV4, ITVBe	2,558	196	Skyfall (ITV2)	1,243
5USA, 5SELECT, 5Spike, 5STAR	2,415	77	We're the Millers (5STAR)	440
Rishtey, Rishtey Cineplex	2,045	3	Ae Dil Hai Mushkil (Rishtey Cineplex)	47
London Live	1,596	8	Who Dares Wins	75
&TV, Zee Cinema, Zee TV, Zing	1,565	3	Toilet: Ek Prem Katha (Zee Cinema)	97
SAB	1,526	3	Mehndi	48
Sony Crime Channel 2, Sony Channel, Sony MAX, TruTV, True Entertainment, True Movies	1,317	7	The Scarlet and the Black (True Entertainment)	173
Movies 24, Syfy, Universal Channel	1,221	31	The Last Starfighter (Syfy)	170
Star Bharat, Star Gold, Star Plus	905	3	Housefull 2 (Star Plus)	16
4Music, 4seven, E4, More4	456	159	Thor (E4)	585
Comedy Central, Comedy Central Extra	374	52	Grown Ups 2 (Comedy Central)	222
Alibi, Dave, Drama, GOLD, W	299	107	The Full Monty (Dave)	493
Horror Channel	211	37	Jeepers Creepers II	156
CBS Action, CBS Drama,	179	12	Firewalker (CBS Action)	100
Sky 1, Sky 2, Sky Arts, Sky Atlantic, Sky Witness	158	93	Crocodile Dundee (Sky1)	387
Vice	99	4	The Hurt Locker	33
Disney Channel, Disney Junior, Disney Junior Plus, Disney XD, Lifetime	56	31	Sleeping Beauty (1959) (Disney Junior)	90
BBC Four, CBBC	54	211	Department Q: A Conspiracy of Faith (BBC Four)	781
Boomerang	51	8	Scooby-Doo and the Cyber Chase	71

Table 11 Feature films on multi-channel television, 2017 (continued)

Channel	Number of films broadcast	Average audience (000)	Top film (channel)	Audience for top film (000) [1]
Others showing less than 50 films a year: ABN TV, AMC, COLORS TV, History, Investigation Discovery, Living Foodz, MTV, Nick Jr, Nick Jr 2, Nickelodeon UK, Nicktoons, NTV Europe, PTC Punjabi, Quest, ShowBiz TV, Venus TV and Vox Africa	226	11	The Omen (Quest)	98

Source: BARB

Notes:

[1] Film with the highest audience figure for an individual transmission.

While *Skyfall* attracted the largest audience for a single transmission on multi-channel television in 2017, *Despicable Me 2* was the most popular film overall, with 13.3 million viewers from 16 transmissions (Table 12). Unusually, every film in the top 10 was shown on the same channel: ITV2. Four of the top 10 films are UK qualifying titles, all of which were produced in collaboration with the US major studios.

Table 12 Top 11 feature films on multi-channel television, 2017

	Title	Channel	Number of transmissions	Country of origin	Year of theatrical release	Total audience[1] (million)
1	Despicable Me 2	ITV2	16	USA/Fra/Jpn	2013	13.3
2	Despicable Me	ITV2	21	USA/Fra	2010	11.9
3	Nanny McPhee	ITV2	17	UK/USA/Fra	2005	9.0
4	Skyfall	ITV2	9	UK/USA	2012	9.0
5	Charlie and the Chocolate Factory	ITV2	13	UK/USA/Aus	2005	8.6
6	The Lord of the Rings: The Fellowship of the Ring	ITV2	16	USA/NZ	2001	8.5
7	White House Down	ITV2	12	USA	2013	7.8
8	Nanny McPhee and the Big Bang	ITV2	17	UK/USA/Fra	2010	7.6
9	Evan Almighty	ITV2	24	USA	2007	7.5
10	The Hobbit: The Desolation of Smaug	ITV2	12	USA/NZ	2013	7.3

Source: BARB

[1] Total audience figure for all transmissions across all free-to-air and paid (non-film subscription) multi-channels.

In 2017, pay TV film channels accounted for 14% of all viewings of film on television. Table 13 shows the top 10 films, in terms of combined viewings, on the additional subscription TV film channels operated by Sky in 2017. The various Sky Cinema channels broadcast a total of 1,672 unique titles across 44,778 slots during the year, with an average audience of just over 10,800. This is up on 2016 when 1,556 unique titles were shown across 45,992 slots (with an average audience of just over 13,300).

Disney and Pixar titles dominate the top 10 with six films in the list including the two most watched titles: *Moana* attracted the largest cumulative audience with 13.1 million viewers over 108 transmissions, followed by *Finding Dory* with 7.9 million viewers over 149 transmissions. The large audience figures for nearly all of the top 10 films are due largely to their being shown at least twice a week over the course of the year. *Moana* also generated the largest audience from any single transmission on pay TV, with 2.2 million viewers for its premiere broadcast in July 2017. There is one UK film in the list, the studio-backed title *Alice Through the Looking Glass*.

Table 13 Top 10 feature films[1] on pay TV film channels, 2017

	Title	Number of transmissions	Country of origin	Year of theatrical release	Total audience[1] (million)
1	Moana	108	USA	2016	13.1
2	Finding Dory	149	USA	2016	7.9
3	The Angry Birds Movie	134	Fin/USA	2016	5.9
4	Sing	73	USA/Jpn	2017	5.5
5	The Secret Life of Pets	94	USA/Jpn	2016	5.1
6	The Incredibles	142	USA	2004	4.9
7	The Lion King	133	USA	1994	4.8
8	Beauty and the Beast	86	USA	1991	4.6
9	Ghostbusters	133	USA/Aus	2016	4.4
10	Alice Through the Looking Glass	175	UK/USA	2016	4.0

Source: BARB

Notes:

[1] Total audience figure for all transmissions across all subscription film channels.

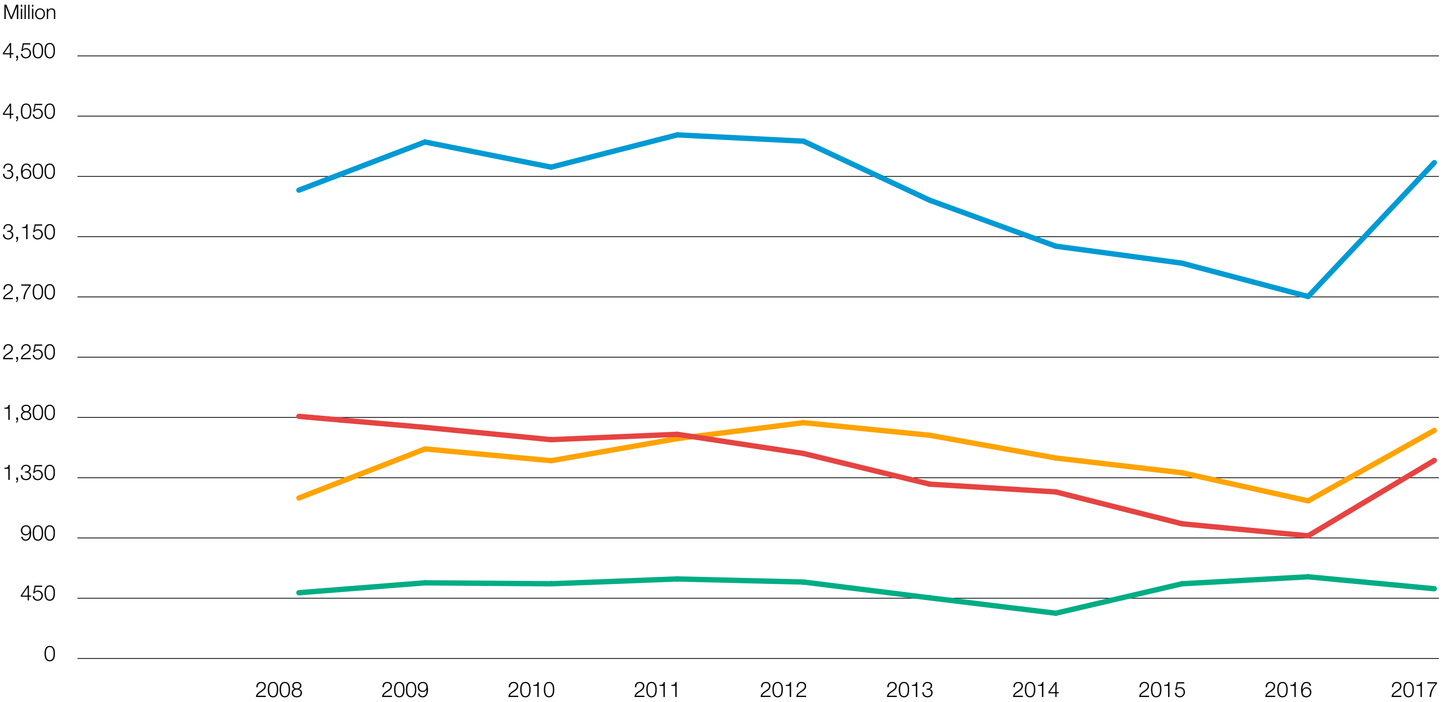
All films were shown on Sky Movies/Sky Cinema.

Image: *Moana* © 2016 Walt Disney Studios Motion Pictures

THE AUDIENCE FOR FILM ON ALL TELEVISION CHANNELS, 2008-2017

In 2017, there were just over 3.7 billion viewings of film on television in the UK (not including pay-per-view) compared with cinema admissions of just under 171 million (Figure 14). This represents approximately 56 film viewings per person per year, up from 41 in 2016. Audience numbers increased for terrestrial and multi-channel television platforms compared with 2016, but decreased for pay TV channels. Multi-channel film viewings (1.7 billion) were greater than terrestrial viewings (1.5 billion) for the sixth consecutive year. Pay TV channels dedicated to film had the smallest overall audience with just over 500 million viewers.

Figure 14 Total audience for feature film on television (except pay-per-view), 2008-2017

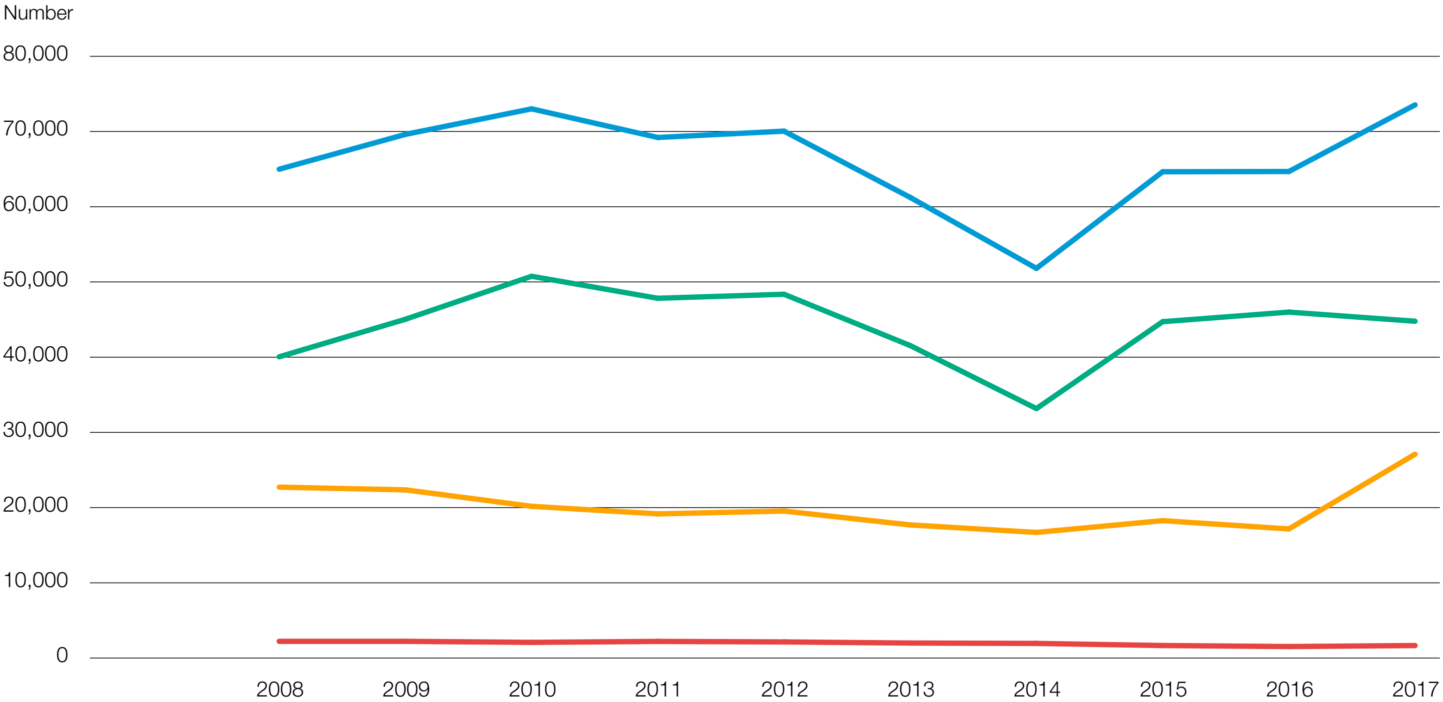


	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Terrestrial	1,808	1,726	1,634	1,674	1,531	1,302	1,244	1,006	916	1,479
Pay TV film channels	491	565	558	594	571	453	338	558	610	521
Other multi-channel	1,198	1,565	1,477	1,642	1,761	1,667	1,497	1,387	1,177	1,703
Total	**3,497**	**3,857**	**3,669**	**3,910**	**3,863**	**3,422**	**3,079**	**2,952**	**2,703**	**3,703**

Source: BFI RSU, BARB

As Figure 15 shows, more films were shown on UK television channels (not including pay-per-view) in 2017 than in any other year in the 10-year period, 2008-2017. In total 7,151 unique film titles were broadcast across 73,538 slots: 1,274 individual film titles were shown on terrestrial TV channels, 1,672 were shown on pay TV film channels and 5,147 were shown on other multi-channels. (This total is less than the sum of the totals of the various channel categories as some titles are shown on multiple platforms.)

Figure 15 Total number of film transmissions on all television channels (except pay-per-view), 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Terrestrial	2,221	2,221	2,085	2,210	2,142	1,994	1,943	1,665	1,528	1,662
Pay TV film channels	40,048	45,039	50,754	47,830	48,365	41,543	33,163	44,717	45,992	44,778
Other multi-channel	22,719	22,359	20,173	19,166	19,541	17,698	16,701	18,268	17,163	27,098
Total	**64,988**	**69,619**	**73,012**	**69,206**	**70,048**	**61,235**	**51,807**	**64,650**	**64,683**	**73,538**

Source: BFI RSU, BARB

THE VALUE OF FEATURE FILM TO BROADCASTERS

We estimate the value of feature film to UK broadcasters to have been approximately £861 million in 2017, up marginally from £860 million in 2016. Of this it is estimated that £142 million is attributable to UK films. This year, television values have been calculated on the basis of a model developed by Ampere Analysis which differs from the methodology used in previous editions of the Yearbook, so the 2016 value has been updated since publication of the 2017 Yearbook. 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

Image: *Victoria & Abdul* ©2017 Focus Features. Courtesy of Universal Studios Licensing LLC

FACTS IN FOCUS

UK FILMED ENTERTAINMENT MARKET REVENUES 2017

Total revenues **£3.4 billion**

Theatrical
£1,280 million

40%
UK films

Physical video
£540 million

34%
UK films

23%
UK films

Digital video
£681 million

16%
UK films

Television
£869 million

FIVE LARGEST FILMED ENTERTAINMENT MARKETS WORLDWIDE 2017[1]

USA	US$19.0 billion
China	US$8.6 billion
Japan	US$5.8 billion
UK	US$3.2 billion
Germany	US$2.5 billion

PROJECTED FIVE LARGEST FILMED ENTERTAINMENT MARKETS WORLDWIDE 2020[1]

USA	US$16.3 billion
China	US$13.4 billion
Japan	US$5.3 billion
India	US$3.2 billion
UK	US$2.8 billion

[1]PwC, Global Entertainment & Media Outlook 2018-2022, www.pwc.com/outlook

THE UK FILM MARKET AS A WHOLE

UK FILMED ENTERTAINMENT MARKET REVENUES

In 2017, theatrical revenues were the most significant component of the film value chain in the UK. As Table 1 shows, the box office (£1.3 billion) accounted for 38% of the total market value in 2017, up from a 30% share in 2016 (£1.2 billion). Revenues from theatrical, digital video and pay TV were up on 2016, while those from physical video rental and retail and terrestrial and multi-channel TV were down. Digital video revenues recorded the largest increase, with a rise in value from £578 million to £681 million, an increase in market share from 17% to 20%.

Gross revenues for UK films in 2017 were estimated to be £998 million, with the share for British films highest in the theatrical market (40%), followed by physical video rental (35%) and physical video retail (34%).

Table 1 UK filmed entertainment market, 2016 and 2017

	2016			2017		
	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	1,228	453	37	1,280	515	40
Physical video rental	48	16	33	37	13	35
Physical video retail	589	197	33	503	171	34
Digital video	578	137	24	681	158	23
Pay TV	645	116	18	661	98	15
Terrestrial and multi-channel TV	215	65	30	208	44	21
Total	**3,304**	**964**	**29**	**3,370**	**998**	**30**

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

Notes:

'Theatrical' is the total gross UK theatrical revenue (including VAT) in the calendar years 2016 and 2017 for all films exhibited in the UK. See Film at the cinema chapter.

'Physical video rental' is the estimated revenue from physical video rental (DVD, Blu-ray, etc) transactions in the calendar years 2016 and 2017. See Home entertainment chapter.

'Physical video retail' is the total revenue from physical video retail transactions in the calendar years 2016 and 2017. See Home entertainment chapter. Digital video revenues are derived from IHS estimates of the combined size of the television and digital video markets. UK share is based on an estimate derived from knowledge of UK film share in the pay TV and video markets. Figures for 2016 have been revised since publication of the 2017 Statistical Yearbook.

The television values are retail equivalent values calculated from the dataset of films shown on UK television. The methodology used this year is different from previous years: values are estimated by dividing broadcaster revenues (from subscriptions, advertising spend and licence fee share) by the percentage of content spend attributed to film. Figures for 2016 have been revised since publication of the 2017 Statistical Yearbook. Television values cover terrestrial, pay TV and other multi-channel TV. See Home entertainment 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.

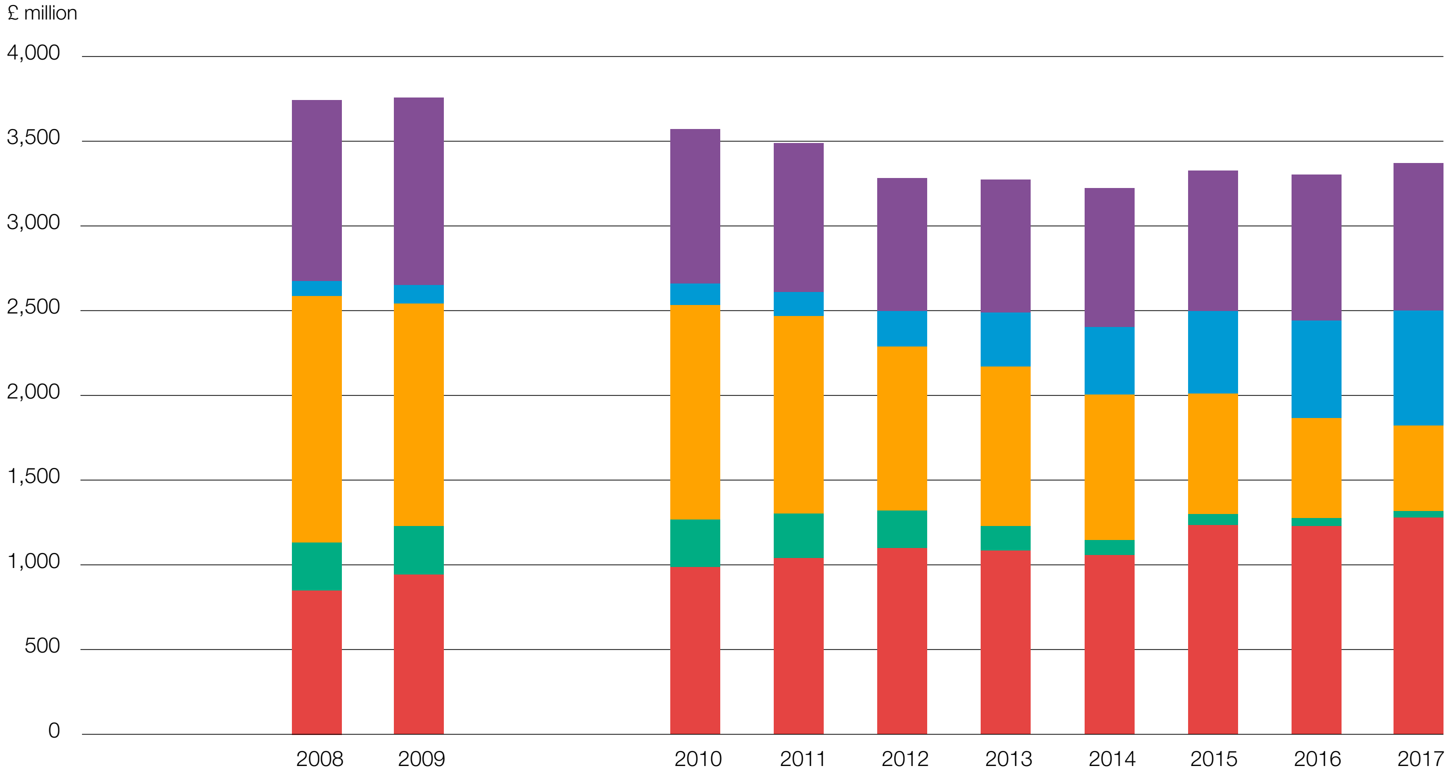
The revenues shown here are revenues earned by film in the UK market, whether UK or foreign films. The table does not include export revenues for the UK film industry. See UK film economy chapter for UK film export revenues.

THE EVOLUTION OF UK FILM REVENUES, 2008-2017

Figure 1 shows aggregated film revenues for the 10-year period 2008-2017. This year, we have adopted a new methodology for the calculation of value attributable to film on television (see the Home entertainment chapter). Revised data from the new model is available from 2010 onwards which means all the data in the chart is not directly comparable: this is indicated by the gap in the trend.

While aggregate film revenues have fluctuated over the period, the data shows a consistent decline in physical video rental and retail revenues. The combined value of physical video sales and rentals fell from £1.7 billion in 2008 to £0.5 billion in 2017. At the same time, theatrical and on-demand revenues have increased. The rise in the value of the digital video market over the decade has been significant. Digital video revenues represented 2% of the overall film value chain in 2008 but accounted for 20% by 2017.

Figure 1 Gross film revenues, all platforms, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Theatrical	850	944	988	1,040	1,099	1,083	1,058	1,236	1,228	1,280
Physical video rental	284	285	278	262	221	146	87	62	48	37
Physical video retail	1,454	1,311	1,267	1,165	968	940	861	712	589	503
Digital video	89	110	127	142	208	320	397	487	578	681
Film on television	1,067	1,108	912	880	785	783	820	830	861	869
Total	**3,743**	**3,758**	**3,571**	**3,489**	**3,281**	**3,272**	**3,223**	**3,327**	**3,304**	**3,370**

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

Notes:

'Film on television' covers terrestrial, pay TV and other multi-channel TV. On-demand television-based services are included within the digital video total.

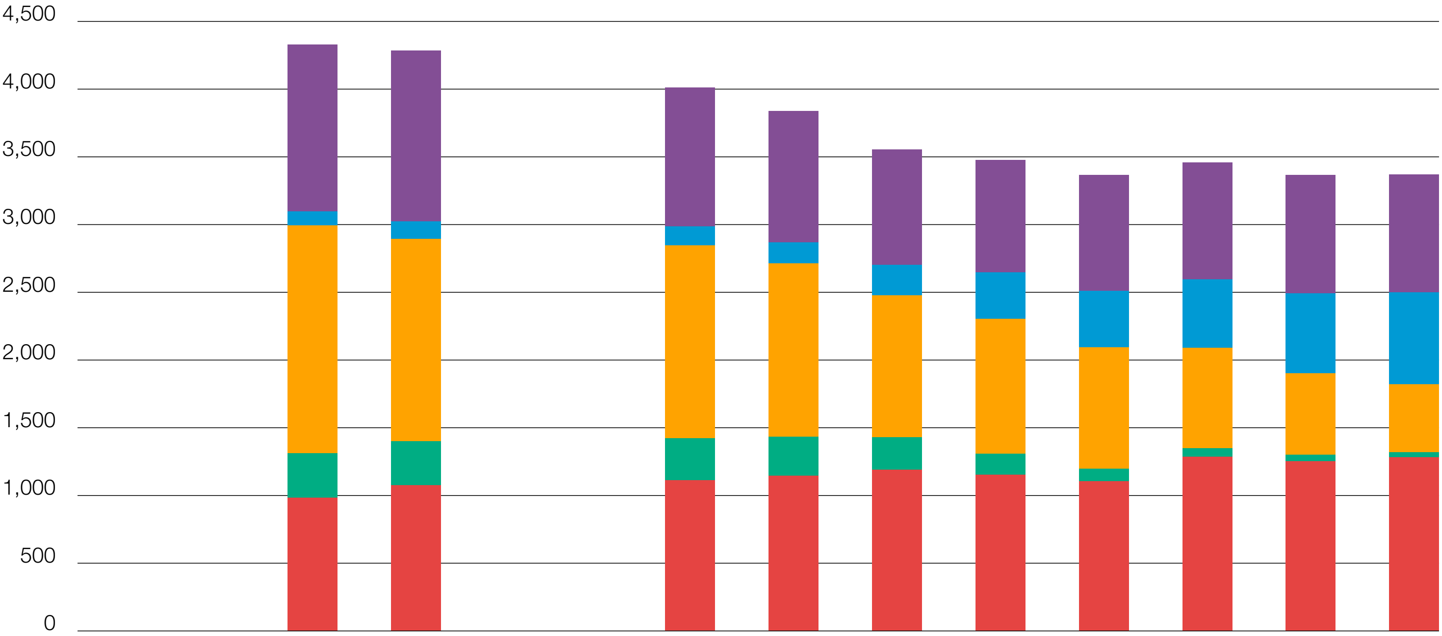
2010-2016 figures for film on television have been revised since publication of the 2017 Statistical Yearbook. See notes to Table 1.

2008-2016 figures for digital video have been revised since publication of the 2017 Statistical Yearbook.

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 2017 market down 22% from the peak in 2008. (Revenues in 2017 were 16% lower than in 2010.) In real terms, film revenues have plateaued since 2013.

Figure 2 Gross inflation-adjusted film revenues, all platforms, 2008-2017 (expressed in 2017 pounds)



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Theatrical	983	1,076	1,108	1,144	1,190	1,151	1,105	1,285	1,252	1,280
Physical video rental	328	325	312	288	240	155	91	65	49	37
Physical video retail	1,682	1,494	1,421	1,281	1,048	999	899	740	601	503
Digital video	103	126	142	156	225	340	415	506	589	681
Film on television	1,234	1,262	1,023	968	850	832	856	863	877	869
Total	**4,329**	**4,282**	**4,006**	**3,836**	**3,553**	**3,476**	**3,366**	**3,460**	**3,369**	**3,370**

Source: comScore, BASE, Official Charts Company, IHS, Ampere, 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-pricesand-money-gdp-march-2017-quarterly-national-accounts-march-2017.

See notes to Figure 1.

Figures may not sum to totals due to rounding.

THE UK FILM MARKET IN THE GLOBAL CONTEXT

According to PwC's *Global Entertainment & Media Outlook 2018-2022*, in 2017 the UK had the fourth largest filmed entertainment market in the world after the USA, China and Japan. The USA accounted for 30% of the world market, with China accounting for 13% and Japan for 9%. The UK accounted for 5% of the market. The next largest countries in terms of market share were Germany (3.9%), France (3.6%) and India (3.2%).

Table 2 Filmed entertainment revenues by country/region, 2017

Country/region	US$ million	%
USA	19,041	29.7
China	8,595	13.4
Japan	5,797	9.0
UK	3,273	5.1
Germany	2,500	3.9
France	2,335	3.6
Other Western Europe	2,152	3.4
India	2,072	3.2
Other Asia Pacific	1,950	3.0
Canada	1,800	2.8
Australia	1,632	2.5
Brazil	1,521	2.4
South Korea	1,464	2.3
Italy	1,295	2.0
Russia	1,176	1.8
Taiwan	1,135	1.8
Mexico	1,110	1.7
Other Central & Eastern Europe	971	1.5
Middle East & Africa	942	1.5
Other Latin America	830	1.3
Spain	777	1.2
Netherlands	475	0.7
Poland	455	0.7
Switzerland	439	0.7
Hong Kong	429	0.7
Total	**64,165**	**100.0**

Source: PwC, *Global Entertainment & Media Outlook 2018-2022*, www.pwc.com/outlook

Notes:

Information contained in this table was taken from the Cinema segment and the Physical Video and Through TV subscription sections of the Traditional TV and Home Video segment of the PwC *Global Entertainment & Media Outlook, 2018-2022* www.pwc.com/outlook, however, some calculations and categorisation of regions are our own. (The breakdown of sectors by segments in *Global Entertainment & Media Outlook* were changed in 2017; filmed entertainment revenues reported here and in the 2017 Statistical Yearbook have been calculated differently to those in previous editions.)

'Filmed entertainment revenue' comprises cinema revenue (including consumer spending at the box office and advertising spend at the cinema) and traditional TV and home video revenue (including consumer spending on basic and premium TV subscriptions; consumer spending on public licence fees where applicable; physical home video revenue; and on-demand video services via a TV subscription provider.) This revenue is both digital and non-digital.

Other Western Europe comprises Austria, Belgium, Denmark, Finland, Greece, Republic of Ireland, Norway, Portugal and Sweden.

Other Asia Pacific comprises Indonesia, Malaysia, New Zealand, Pakistan, Philippines, Singapore, Thailand and Vietnam.

Other Central & Eastern Europe comprises Czechia, Hungary, Israel, Romania and Turkey.

Middle East & Africa comprises Algeria, Bahrain, Egypt, Jordan, Kenya, Kuwait, Lebanon, Morocco, Nigeria, Oman, Qatar, Saudi Arabia, South Africa and the United Arab Emirates.

Other Latin America comprises Argentina, Chile, Colombia, Peru and Venezuela.

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

According to PwC forecasts, the USA, China and Japan will remain the world's top three markets for filmed entertainment over the next four years (although the USA will lose significant share to China). However, India will overtake the UK, France and Germany to become the fourth largest market (Table 3).

Table 3 Filmed entertainment revenues by country/region, forecast for 2022

Country/region	US$ million	%
USA	16,316	24.3
China	13,446	20.0
Japan	5,338	7.9
India	3,230	4.8
UK	2,764	4.1
Other Asia Pacific	2,221	3.3
France	2,188	3.3
Other Western Europe	2,090	3.1
Germany	1,902	2.8
Brazil	1,753	2.6
Canada	1,683	2.5
South Korea	1,678	2.5
Russia	1,511	2.2
Australia	1,460	2.2
Italy	1,379	2.1
Mexico	1,284	1.9
Middle East & Africa	1,254	1.9
Other Central & Eastern Europe	1,068	1.6
Other Latin America	1,040	1.5
Spain	898	1.3
Taiwan	840	1.3
Netherlands	502	0.7
Poland	498	0.7
Switzerland	408	0.6
Hong Kong	397	0.6
Total	**67,146**	**100.0**

Source: PwC, *Global Entertainment & Media Outlook 2018-2022*, www.pwc.com/outlook

Notes:

Information contained in this table was taken from the Cinema segment and the Physical Video and Through TV subscription sections of the Traditional TV and Home Video segment of the PwC *Global Entertainment & Media Outlook, 2018-2022*, www.pwc.com/outlook, however, some calculations and categorisation of regions are our own. (The breakdown of sectors by segments in Global Entertainment & Media Outlook were changed in 2017; filmed entertainment revenues reported here and in the 2017 Statistical Yearbook have been calculated differently to those in previous editions.)

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

See notes to Table 2.

AUDIENCES

Image: *Jackie* © Stéphanie Branchu courtesy of eOne Films

FACTS IN FOCUS

AUDIENCE FOR FILM IN THE UK

85%

of UK adults watch a **film or movie** at least **once** every **three** months

CINEMA AUDIENCE BY AGE

% of average cinema audience

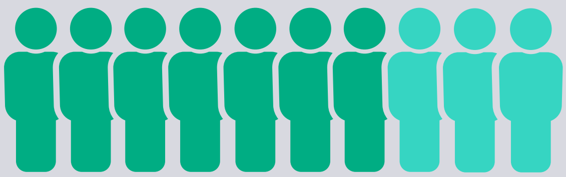
15-24

55+

Young cinema-goers outweigh older adults by **3** to **1**

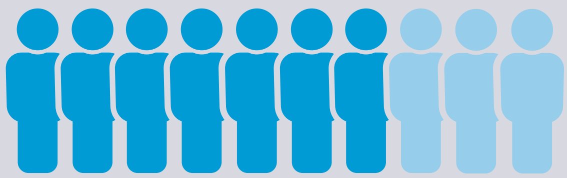
FILM PREFERENCES BY AGE

Youngest skewing title at cinema



7 out of **10** cinema-goers who saw Happy Death Day were aged 15-24

Oldest skewing title at cinema



7 out of **10** cinema-goers who saw Viceroy's House were aged 55+

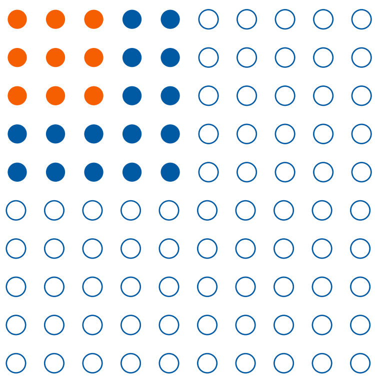
FILM PREFERENCES BY NATION

25%

1 in **4** of the cinema audience for T2 Trainspotting were **Scottish** compared with

9%

for **all films**

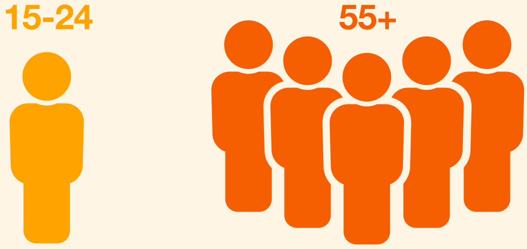


TELEVISION AUDIENCE FOR FILM BY AGE

% of average television audience for film

15-24

55+



Older adults who watch films on TV outweigh younger viewers by **5** to **1**

AGE PROFILE FOR FILM AUDIENCES ACROSS PLATFORMS

% of audience aged 18-24

28%

21%

8%

Comparing the three main platforms for film, cinema audiences are the youngest, followed by SVoD and lastly TV.

CINEMA AUDIENCE FOR UK FILMS

% of audience for UK films

17.3%

aged 55+
(vs 11.5%)

65.7%

ABC1
(vs 60.9%)

UK films at the cinema attract an older and more upmarket audience compared to all films

AUDIENCES

AVAILABILITY OF COMPREHENSIVE DATA ON FILM AUDIENCES

The audience is fundamental to supporting the economic and cultural impact of the film industry, and audiences have more choice than ever before of where, when and how to watch films. As we have seen in other chapters, in 2017 television remained the most popular platform in the UK for watching film while cinema-going remained the largest single revenue source for the film industry.

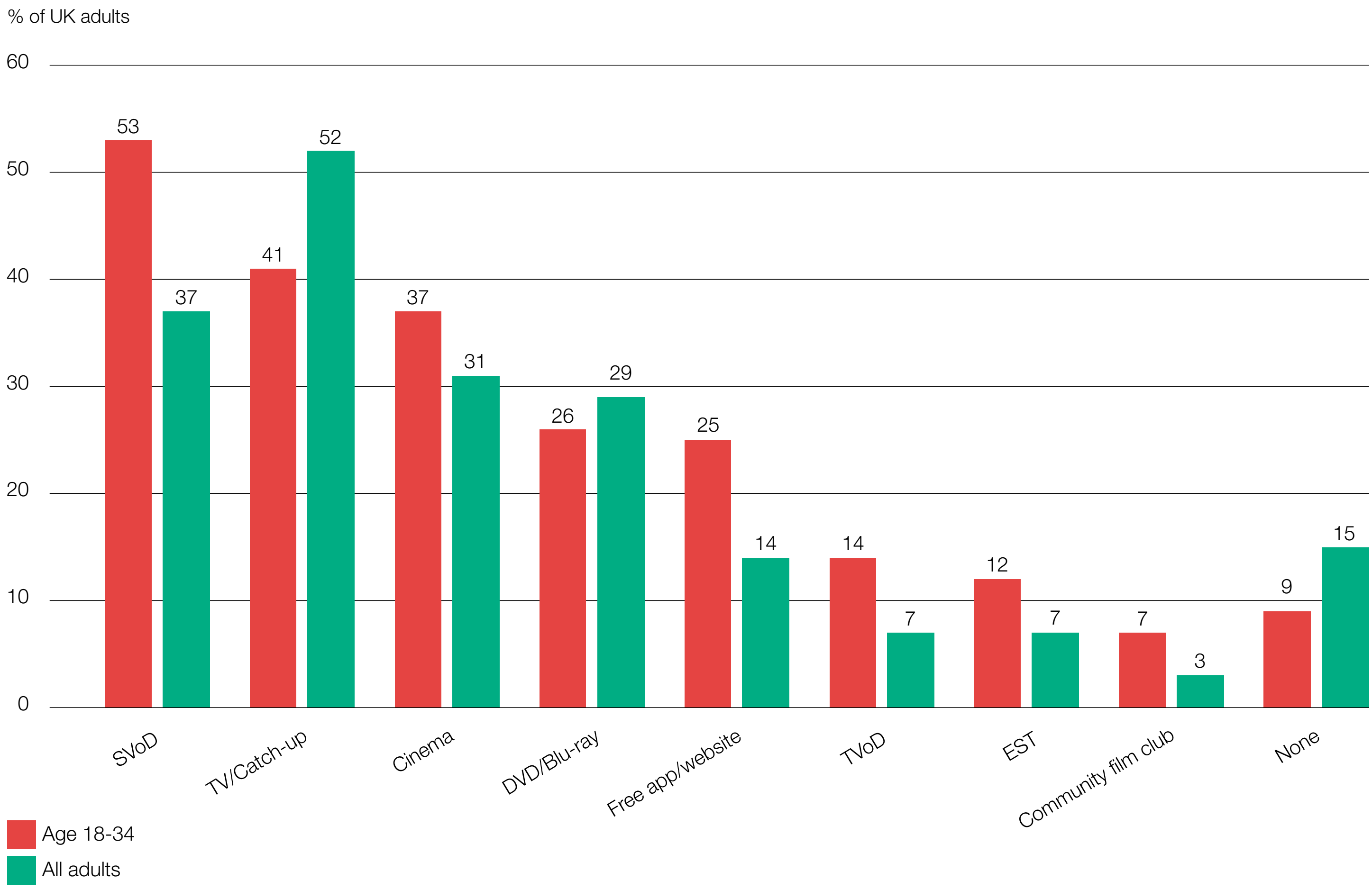
This year, we have expanded the scope of this chapter to include more data about audiences on platforms for which there have been limited data in the past, in particular services offering OTT Subscription Video on Demand (SVoD) ie VoD services outside those available as part of a pay TV package. However, it is also true to say that across the industry, there is currently still a lack of granular data about the wider world of film and there is no single source study, of which we are aware, that enables comparison of film audiences between platforms and services.

The industry also lacks robust data about the diversity of film audiences. Work is presently underway within the BFI to address this, and next year's Yearbook will thus include analysis of audience diversity in addition to the traditional demographic profiles reported here.

AUDIENCES FOR FILM IN THE UK BY PLATFORM

Audiences for film both at the cinema and at home continue to attract large numbers of the UK population. When asked whether they had watched any film or movie in the previous three months, 85% of the UK adult population responded positively (Figure 1). Whilst amongst all adults, the largest reach (52%) was for films shown on television, the most popular platform amongst 18-34 year olds was SVoD which underlines the disruption to traditional patterns of film consumption which has been driven by the arrival of these services in the UK.

Figure 1 Audiences for film in the UK by platform



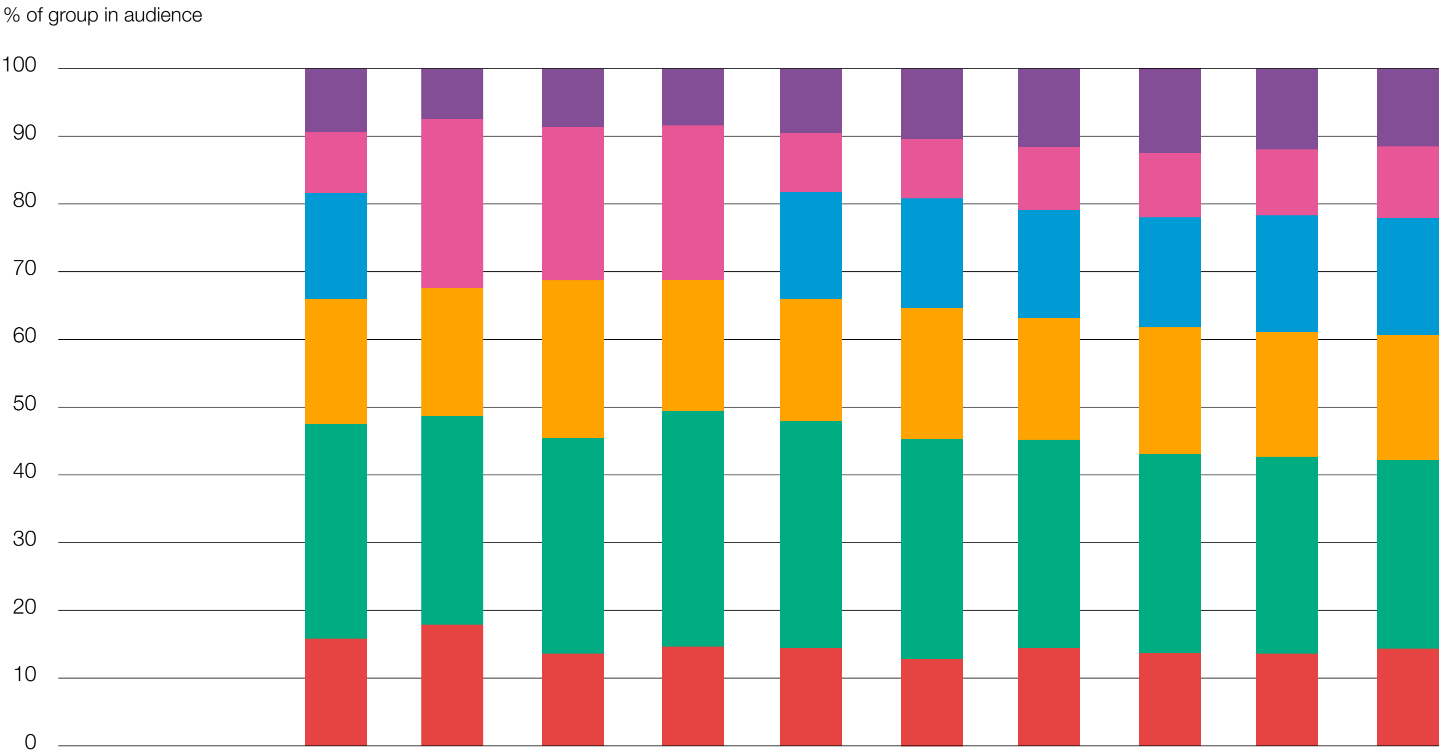
Source: Walnut Unlimited Omnibus Survey, Q1, 2018
Q: In the last three months have you watched a film/movie in any of the following ways? UK adults 18+, Base (2,009)

CINEMA AUDIENCE BY AGE

Figure 2 shows the trends by age for cinema admissions between 2008 and 2017. The age profile over the period shows few marked changes apart from one or two small spikes that reflect the release of a number of successful titles with strong appeal to particular age groups. Overall, there has been a small, but steady, downward trend in the share of admissions accounted for by 15-24 year olds. (The share of the cinema-going audience amongst 15-24 year olds has seen a significant drop over recent decades: in the 1990s this group regularly made up over 40% of the audience whereas in 2017 they represented just 28%, the lowest audience share in the past 20 years.) Nevertheless, 15-24 year olds remain the largest segment of the cinema-going audience and outweigh those aged 55 or over by a factor of almost 3 to 1.

As the chart shows, older (45+) cinema-goers have gradually increased their representation in cinema audiences over the period. It is hard to pinpoint the reasons for this, since the age profile of the UK population amongst this group has been increasing at the same rate as the profile of cinema audiences (around two percentage points in the last 10 years). We might have expected the audience profile in 2017 to have shown an increase in the proportion of 55+ cinema-goers in particular, given the growth in both accessible and 'silver' screenings and the number of films released during the year with appeal to this demographic (*Viceroy's House, Their Finest* and *Victoria & Abdul, amongst others*). It is possible, however, that the proportion of cinema admissions amongst this group will increase over coming years as 'boomers' (those born between 1945 and 1960) become more significant within the active retired population.

Figure 2 Age distribution of cinema admissions, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Age 7-14	15.8	17.9	13.6	14.6	14.4	12.9	14.4	13.6	13.6	14.3
Age 15-24	31.7	30.7	31.8	34.8	33.5	32.5	30.8	29.4	29.1	27.8
Age 25-34	18.5	19.0	23.3	19.3	18.1	19.4	18.0	18.7	18.4	18.5
Age 35-44	15.6	16.1	14.0	14.8	15.8	16.1	15.9	16.3	17.2	17.3
Age 45-54	9.0	8.8	8.7	8.0	8.7	8.8	9.3	9.5	9.7	10.5
Age 55+	9.4	7.5	8.7	8.3	9.4	10.4	11.5	12.5	12.0	11.5

Source: CAA Film Monitor, based on all films released during 2017 and captured in the Film Monitor Survey 2017. Base: 81 titles, n=126,811

CINEMA AUDIENCE BY GENDER AND SOCIO-ECONOMIC STATUS

Males typically outweigh females in the overall cinema audience and over-index versus their representation in the UK population as a whole. In 2017, males accounted for 52% of all cinema admissions but made up only 49% of the UK population. Table 1 shows, however, that this is not consistent by age group. While cinema audiences drawn from 25-44 year olds skewed strongly towards men, amongst older (35+) audiences, women outweighed men. In this latter group, the proportion of men and women in the cinema audience is thus more aligned to their age profile in the UK population.

In terms of socio-economic status, the average cinema audience attracts a disproportionate share of individuals from the higher social grades in all age groups compared with the general population. This is most marked amongst the older (35+) audience.

Table 1 Cinema audiences by age and gender/social grade, 2017

	Cinema audiences					UK population
	Age 7-14	Age 15-24	Age 25-44	Age 35+	All 7+	7+
	%	%	%	%	%	%
Males	53	54	56	49	52	49
Females	47	46	44	51	48	51
ABC1	58	57	62	67	62	55
C2DE	42	43	38	33	38	45

Source: CAA Film Monitor, 2017. Base as Figure 2

CINEMA AUDIENCE FOR UK FILMS

This section looks at the audience profile for UK films as a subset of all films. Of the total of 81 films covered by the Cinema Advertising Association (CAA) Film Monitor, 26 were UK qualifying productions, of which nine were UK independent titles.

As Table 2 shows, the audience profile for UK films is slightly different to that for all films. UK films attracted a higher proportion of their audience from the older age groups, particularly those aged 55 or over, reflecting the genres of UK film releases in 2017 which included several period dramas and war films such as *Viceroy's House, Their Finest, Victoria & Abdul* and *Dunkirk*. UK films skewed very slightly more male than all films, but had a significantly more affluent audience profile than that for all films.

Table 2 Audience profile of UK films compared with all films, 2017

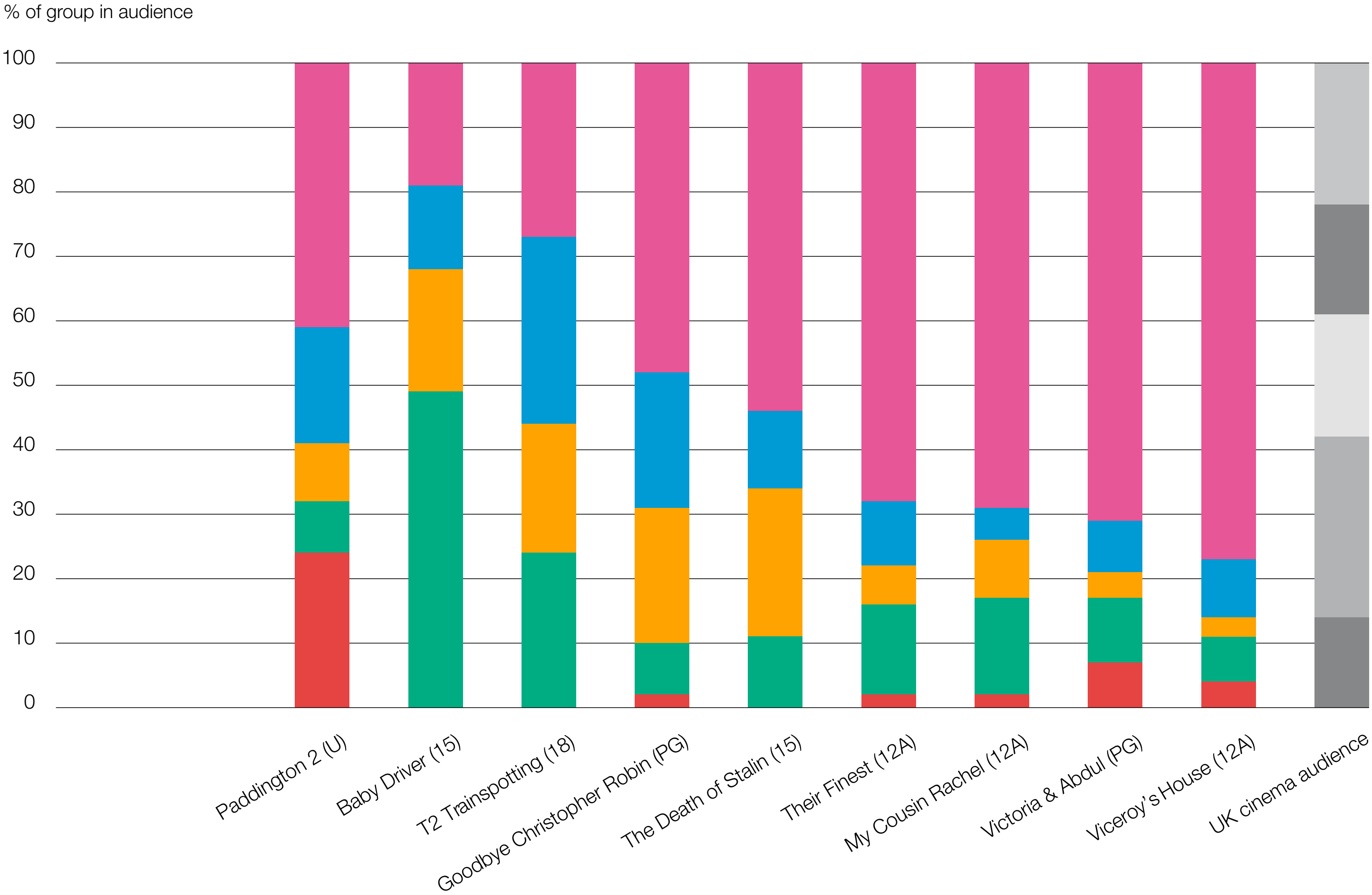
	UK films	All films (including UK films)
	%	%
Age 7-14	10.1	14.3
Age 15-24	24.7	27.8
Age 25-34	18.3	18.5
Age 35-44	17.2	17.3
Age 45-54	12.4	10.5
Age 55+	17.3	11.5
Male	52.4	51.2
Female	47.6	48.8
ABC1	65.7	60.9
C2DE	34.3	39.1
England	83.4	82.7
Scotland	8.9	8.9
Wales	7.7	8.5

Source: CAA Film Monitor
Base: all films, 81 titles, n=126,811; UK films, 26 titles, n=36,266.

The age profiles for the top UK independent films captured by Film Monitor and released in 2017 show they attracted a wide variety of audiences by age (Figure 3). Whilst in general they appealed to a slightly older than average profile, several films, notably *Viceroy's House, Victoria & Abdul, My Cousin Rachel* and *Their Finest*, all attracted audiences for whom over two thirds of all viewers were aged 45 or over. The following chart (Figure 4) shows that these films also attracted audiences that were very upmarket but also predominantly female.

At the other end of the scale, as might be expected, *Paddington 2* was popular amongst younger audiences, whilst *Baby Driver* and *T2 Trainspotting* both attracted large numbers of 15-34 year olds, more typical of the average cinema audience.

Figure 3 Cinema audience profile by age for the top UK independent film titles, 2017



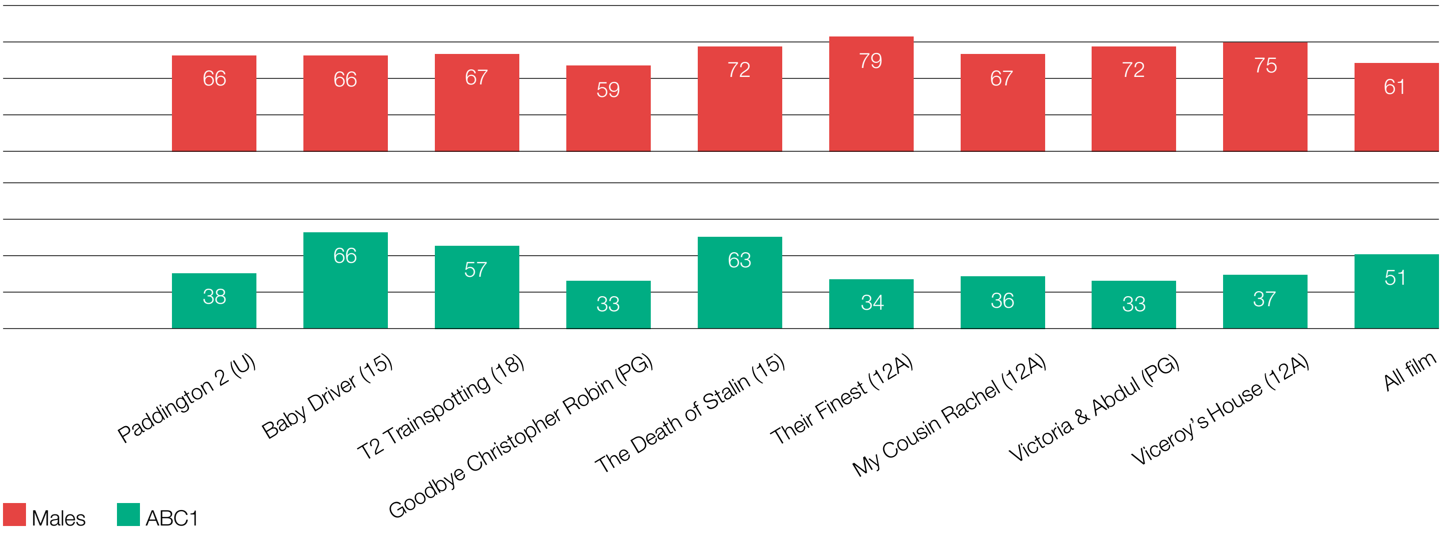
	Paddington 2 (U)	Baby Driver (15)	T2 Trainspotting (18)	Goodbye Christopher Robin (PG)	The Death of Stalin (15)	Their Finest (12A)	My Cousin Rachel (12A)	Victoria & Abdul (PG)	Viceroy's House (12A)	UK cinema audience
Age 7-14	24	-	-	2	-	2	2	7	4	14
Age 15-24	8	49	24	8	11	14	15	10	7	28
Age 25-34	9	19	20	21	23	6	9	4	3	19
Age 35-44	18	13	29	21	12	10	5	8	9	17
Age 45+	41	19	27	48	54	68	69	71	77	22

Source: CAA Film Monitor

Note: Film Monitor captures nine of the top 20 UK independent films released in 2017 and identified in the Yearbook chapter, Film at the cinema.

Figure 4 Cinema audience profile by gender and socio-economic status for the top UK independent film titles, 2017

% of group in audience



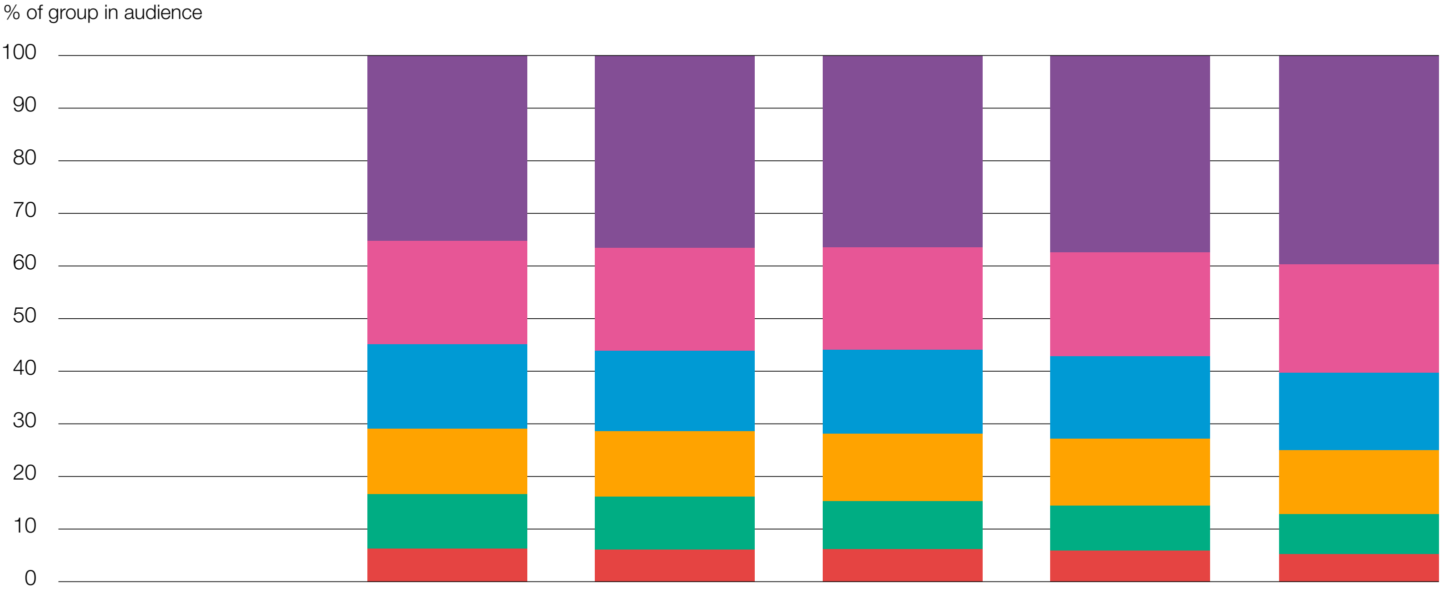
Source: CAA Film Monitor

Image: *Viceroy's House* courtesy of Pathé UK

AUDIENCES FOR FILM ON TELEVISION

The age distribution of audiences for film on television shows a slightly different pattern to that of cinema audiences. Generally speaking, individuals who watch films on television tend to be in the older age groups, with more than half the audience aged 45 or over. As with cinema-goers, there is evidence that the television audience is growing older through time, albeit at a faster rate than within the UK population as a whole. As Figure 5 shows, the proportion of older (45+) viewers increased by 4% between 2013 and 2017, while the share of the youngest (7-24) viewers in the data declined at more or less the same rate.

Figure 5 Age distribution of television audiences for film, all channels, 2013-2017



	2013	2014	2015	2016	2017
Age 7-14	6.3	6.1	6.2	5.9	5.2
Age 15-24	10.3	10.0	9.1	8.5	7.6
Age 25-34	12.5	12.5	12.8	12.8	12.1
Age 35-44	16.0	15.3	16.0	15.6	14.8
Age 45-54	19.7	19.5	19.4	19.8	20.6
Age 55+	35.2	36.6	37.6	37.4	39.6

Source: BARB/TechEdge, 2017, All individuals 7yrs+, Total TV, Filtered on 'cinema film' genre

FILM PREFERENCES BY AGE

Tables 3-8 show the top 10 films with the highest average % of group in the total audience, for six different age groups, for all films released in cinemas in 2017 and captured in the Cinema Advertising Association Film Monitor. This is compared with the equivalent for all films transmitted on any television channel (including pay TV). The data show a measure of preference of the type and range of films that appeal most to each group, indicated by that group's representation in the audience, regardless of how many saw the film in total.

Family films and animated features appealed most to the 7-14 year old age group with three animations – *Sing, The Boss Baby* and *Smurfs: The Lost Village* – appearing in both the cinema and television lists. Most of the top 10 preferred television films for this age group were screened on Sky Cinema Premiere, which suggests the value families with young children place on access to the range of content offered by a Sky Cinema subscription. Interestingly, this was the only age group not to feature at least one UK film in either list.

The 15-24 year old age group made up 28% of the average cinema audience in 2017 compared with only 8% of the audience for film on television. Titles offering thrills and spills dominate the list of in-cinema films that appealed most to this group. The release with the greatest appeal was the low-budget horror *Happy Death Day* (one of three titles in the list by horror producer Jason Blum). As viewers of films on television, however, this group showed a marked preference for lighter fare with romantic and action comedies dominating the top 10 list. This dichotomy may be explained by the composition of those sharing the film watching experience, particularly whether made up of friends or other family members. *The Back-up Plan*, a romantic comedy starring Jennifer Lopez, achieved the highest indexing audience for this group on television.

While the top indexing film at the cinema for 25-34 year olds was the 18-rated Saw franchise reboot, *Jigsaw* (which may reflect a continuing loyalty to the series), the majority of in-cinema films with high appeal to this group were action, adventure and fantasy titles, including *The Hitman's Bodyguard* and *King Arthur: Legend of the Sword*. As with 15-24 year olds, romantic and action comedies outweighed other genres in the top 10 television list for this group. It is interesting to note the presence of a biopic, *All Eyez on Me*, which tells the story of US rapper and actor Tupac Shakur, appearing in the top 10 in-cinema preferences for both 15-24 and 25-34 year olds.

The preferences of the 35-44 year old age group were clearly split between titles they watch as a family and those which they themselves have chosen. This is particularly true of films watched in the cinema where high indexing titles included both *My Little Pony: The Movie* and *Fifty Shades Darker*. *T2 Trainspotting* appears in both the cinema and television top 10s in 2017, suggesting the film clearly has resonance for this audience which would have been in the 15-24 age group when the original film was released in 1996.

A variety of genres were popular with cinema-goers in the two older age groups, both of which showed a strong preference for UK films (Tables 7 and 8). The data indicate that 45-54 year olds may have the broadest taste of all groups in terms of cinema-going: the top 10 cinema list for this age demographic is the least skewed, with the highest indexing title *The Snowman*, attracting less than two in 10 audience members from this group. The opposite is true of cinema-goers aged 55 or over who made up over half the audience for four of their top 10 in-cinema titles and over 70% of the audience for their top indexing film, *Viceroy's House*. On television, the preferences of these two groups included an eclectic mix of films, the majority of which were transmitted on the main terrestrial channels. The most significant difference between the two was a marked preference for older Hollywood classics by viewers aged 55+ compared to 44-54 year olds. (That many of these titles were broadcast in the afternoon highlights the greater leisure time available to viewers in this age group.) The 55+ group was the only age category in the data to over-index on a foreign language title – the North Sea oil exploration thriller *Pioneer* (in Norwegian) which was broadcast on BBC Four.

Table 3 Films with an above-average audience profile in the 7-14 age group, 2017 top films in the cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Diary of a Wimpy Kid: The Long Haul	53	Top Cat Begins	Sky Cinema Premiere	30
The Emoji Movie	44	Smurfs: The Lost Village	Sky Cinema Premiere	29
Sing	43	Kubo and the Two Strings	Sky Cinema Premiere	29
Smurfs: The Lost Village	42	The Boss Baby	Sky Cinema Premiere	29
The Boss Baby	40	Rock Dog	Sky Cinema Premiere	29
Captain Underpants: The First Epic Movie	39	The Secret Life of Pets	Sky Cinema Premiere	26
The LEGO Ninjago Movie	38	Sing	Sky Cinema Premiere	26
Despicable Me 3	35	Flubber	5Star	26
The LEGO Batman Movie	33	Storks	Sky Cinema Premiere	26
My Little Pony: The Movie	27	The Angry Birds Movie	Sky Cinema Premiere	25
7-14yrs average profile of all films	14	7-14yrs average profile of all films on TV		5
7-14yrs in survey population	10	7-14yrs in total TV audience		4

Source: CAA Film Monitor

Notes:

'Audience' in this table and throughout this chapter refers to film-going occasions. That is, 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 included 81 film titles (mostly mainstream) of the theatrical releases in 2017. The Film Monitor survey is carried out via a fortnightly omnibus survey of over 1,000 adults and children aged 7+, of those who had been to the cinema in the previous three months. Films are also age-filtered based on the film certificate and the survey does not cover Northern Ireland.

Television audiences are collated from BARB data and cover all films classified by BARB as 'cinema films', which include made-for-TV films, shown on any channel that achieved an average audience of over 250,000. The audience profile is measured at title level, so if a film is shown more than once on a single channel, the audience for that title is averaged across all showings. If a film is shown on multiple channels, eg CBBC and BBC One, then the average is taken for all transmissions per channel (not aggregated across all showings).

Table 4 Films with a significant above-average audience profile in the 15-24 age group, 2017 top films in the cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Happy Death Day	69	The Back-up Plan	ITV2	30
Baywatch	66	21 Jump Street	Channel 5	29
Annabelle: Creation	63	Love Actually (UK)	Sky Cinema Comedy	29
It	62	War Dogs	Sky Cinema Premiere	29
All Eyez on Me	56	Cheaper by the Dozen	Film4	26
Split	55	22 Jump Street	ITV2	25
Get Out	54	Why Him?	Sky Cinema Premiere	25
Baby Driver (UK)	49	Split	Sky Cinema Premiere	24
Girls Trip	48	Fist Fight	Sky Cinema Premiere	24
The Fate of the Furious	44	American Reunion	E4	24
15-24yrs average profile of all films	28	15-24yrs average profile of all films on TV		8
15-24yrs in survey population	15	15-24yrs in total TV audience		6

Source: CAA Film Monitor

See notes to Table 3.

Table 5 Films with a significant above-average audience profile in the 25-34 age group, 2017 top films on cinema and television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Jigsaw	32	Dirty 30	Sky Cinema Premiere	46
The Hitman's Bodyguard (UK)	29	This Means War	E4	39
King Arthur: Legend of the Sword (UK)	29	22 Jump Street	ITV2	37
All Eyez on Me	28	American Pie	ITV2	36
The Mummy	28	Sweeney Todd: The Demon Barber of Fleet Street (UK)	ITV2	34
Logan	27	Fast & Furious	ITV2	34
Snatched	27	Mr Right	Sky Cinema Premiere	34
Detroit	27	Friends with Benefits	E4	33
Atomic Blonde	27	Teenage Mutant Ninja Turtles	Sky Cinema Premiere	33
Power Rangers	26	American Pie: The Wedding	ITV2	33
25-34yrs average profile of all films	19	25-34yrs average profile of all films on TV		12
25-34yrs in survey population	14	25-34yrs in total TV audience		10

Source: CAA Film Monitor

See notes to Table 3.

Table 6 Films with a significant above-average audience profile in the 35-44 age group, 2017 top films in cinema and television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Alien: Covenant (UK)	32	T2 Trainspotting (UK)	Sky Cinema Premiere	37
A Bad Mom's Christmas	29	Rock Dog	Sky Cinema Premiere	37
T2 Trainspotting (UK)	29	Green Lantern	5Star	36
My Little Pony: The Movie	26	Top Cat Begins	Sky Cinema Premiere	36
Peppa Pig: My First Cinema Experience (UK)	26	Underworld: Blood Wars	Sky Cinema Premiere	36
Geostorm (UK)	25	Star Wars: Episode VI - Return of the Jedi	Sky 1	33
Fifty Shades Darker	24	Batman vs Superman: Dawn of Justice	Sky Cinema Premiere	33
The LEGO Ninjago movie	24	Robin Hood: Prince of Thieves	Dave	32
Detroit	23	Ghostbusters	Sky Cinema Premiere	31
Atomic Blonde	23	Star Wars: Episode V - The Empire Strikes Back	Sky 1	31
35-44yrs average profile of all films	17	35-44yrs average profile of all films on TV		15
35-44yrs in survey population	15	35-44yrs in total TV audience		12

Source: CAA Film Monitor

See notes to Table 3.

Table 7 Films with a significant above-average audience profile in the 45-54 age group, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
The Snowman (UK)	19	Captain Ron	Channel 4	43
A Bad Mom's Christmas	18	Dead Man's Shoes (UK)	Film4	41
The Mountain Between Us	18	The Woman in Black 2: Angel of Death (UK)	Film4	40
The Mummy	17	Purple Rain	Channel 5	37
Paddington 2 (UK)	17	Sex & Drugs & Rock & Roll (UK)	BBC Two	37
My Cousin Rachel (UK)	17	The Man with the Iron Fists	Film4	36
John Wick Chapter 2	16	The Stepford Wives	BBC One	35
Dunkirk (UK)	16	Legion	Film4	35
Jackie	16	Sin City: A Dame to Kill For	Channel 4	34
The Death of Stalin (UK)	15	Jaws 2	ITV4	34
45-54yrs average profile of all films	11	45-54yrs average profile of all films on TV		21
45-54yrs in survey population	12	45-54yrs in total TV audience		18

Source: CAA Film Monitor

See notes to Table 3.

Table 8 Films with a significant above-average audience profile in the 55+ age group, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Viceroy's House (UK)	71	A Risk Worth Taking	Channel 5	90
Victoria & Abdul (UK)	56	Lawman	ITV4	87
Their Finest (UK)	54	Kismet	BBC Two	87
My Cousin Rachel (UK)	52	The Great Caruso	BBC Two	86
Jackie	40	Firecreek	BBC Two	86
Murder on the Orient Express (UK)	39	Love is a Many Splendored Thing	BBC Two	86
Lion (UK)	39	Tobruk	ITV4	86
The Death of Stalin (UK)	38	Pioneer	BBC Four	84
Manchester by the Sea	35	The Winslow Boy (UK)	BBC Two	84
Goodbye Christopher Robin (UK)	34	The Young Victoria (UK)	ITV3	84
55yrs+ average profile of all films	12	55yrs+ average profile of all films on TV		40
55yrs+ in survey population	34	55yrs+ in total TV audience		51

Source: CAA Film Monitor

See notes to Table 3.


Image: *Peppa Pig: My First Cinema Experience* courtesy of eOne Films

FILM PREFERENCES BY GENDER

Tables 9-10 show the top 10 films with the highest average % of group in the total audience (aged 7+) by gender for all films released in cinemas in 2017 – and captured in the Cinema Advertising Association Film Monitor – compared with the equivalent for all films transmitted on television. Whilst the overall audience for in-cinema films showed a slight bias to male viewers, those on television skewed slightly to females.

There were distinct differences in film preferences by gender for both films shown at the cinema and those transmitted on television. As in the past, films attracting a predominantly female audience included comedies and dramas with strong female protagonists alongside family and children's films. Three quarters of the cinema audience for the US comedy *Pitch Perfect 3* were female, while four out of five viewers for *Mansfield Park* and *Becoming Jane* (both shown on BBC Two) were female. Four of the top 10 female skewed films in the cinema in 2017 were UK qualifying titles, two of which, *Victoria & Abdul* and *Goodbye Christopher Robin*, were UK independent films.

Males continue to show a preference for, and over index in the audience to, action-driven genres both in the cinema and on television. Four out of five cinema-goers for the Tom Cruise thriller *American Made* were male, while three quarters of the television audience for the superhero film *Green Lantern* was male. Unusually, the top male skewing film preferences include one documentary: *Zero Days*, a film about cyber warfare transmitted as part of the Storyville strand on BBC Four. There were four UK qualifying titles in the top 10 male skewed films shown at the cinema in 2017, all of which were made in collaboration with the US major studios.

Table 9 Films with a significant above average audience profile amongst females (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
My Little Pony: The Movie	79	Bride Wars	Channel 5	82
Peppa Pig: My First Cinema Experience (UK)	77	Mansfield Park (UK)	BBC Two	80
Beauty and the Beast (UK)	75	Becoming Jane (UK)	BBC Two	80
Pitch Perfect 3	74	Love, Again	Channel 5	80
Fifty Shades Darker	73	Nanny for Christmas	Channel 5	78
Girls Trip	73	The Reckoning	Channel 5	78
A Bad Mom's Christmas	71	Clueless	Channel 4	76
Smurfs: The Lost Village	68	The Young Victoria (UK)	ITV3	76
Victoria & Abdul (UK)	67	Bundle of Joy	BBC Two	76
Goodbye Christopher Robin (UK)	67	The Red Shoes (UK)	BBC Two	75
7yrs+ female average profile of all films	49	7yrs+ female average profile all films on TV		51
7yrs+ female in survey population	51	7yrs+ female in total TV audience		56

Source: CAA Film Monitor
See notes to Table 3.

Table 10 Films with a significant above average audience profile amongst males (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
American Made	80	Green Lantern	5Star	76
Alien: Covenant (UK)	76	The Outlaw Josey Wales	ITV4	75
John Wick: Chapter 2	70	Slow West (UK)	Film4	73
King Arthur: Legend of he Sword (UK)	70	Sin City: A Dame to Kill For	Channel 4	72
Hacksaw Ridge	69	Monsters: Dark Continent (UK)	Film4	72
Geostorm (UK)	68	Conan the Barbarian	Channel 5	72
Assassin's Creed (UK)	68	Zombieland	Channel 4	70
Blade Runner 2049 (UK)	67	Nymphomaniac: Vol 1	Film4	70
Justice League	67	Zero Days	BBC Four	70
All Eyez on Me	67	Pale Rider	ITV4	70
7yrs+ male average profile of all films	51	7yrs+ male average profile of all films on TV		49
7yrs+ male in survey population	49	7yrs+ male in total TV audience		44

Source: CAA Film Monitor
See notes to Table 3.

FILM PREFERENCES BY SOCIO-ECONOMIC GROUP

Tables 11-12 show the top 10 films with the highest average % of group in the total audience by socio-economic group for all films released in cinemas in 2017 – and captured in the Cinema Advertising Association Film Monitor – compared with the equivalent for all films transmitted on television.

The cinema audience overall tends to skew towards ABC1 viewers compared with the UK population, whereas the profile of film audiences on television is no different to the average total television audience, with a profile skewed more to the C2DE socio-economic group.

UK films released in the cinema in 2017 attracted high proportions of ABC1 viewers with six of the top 10 films amongst this group being UK qualifying productions, of which four were UK independent films. The US biopic, *Jackie*, which tells the story of Jackie Kennedy in the aftermath of the assassination of President John F Kennedy, attracted the most upmarket cinema audience of 2017, with UK wartime drama *Their Finest* and another US drama focused on grief, *Manchester by the Sea*, also almost as equally preferred by the ABC1 audience. On television, two critically lauded horror films, *10 Cloverfield Lane* and *Don't Breathe*, both shown on Sky Cinema Premiere, attracted a high proportion of ABC1 viewers, well above the share for all films on television generally. Two foreign language features from the Danish Department Q series shown on BBC Four, *The Keeper of Lost Causes* and *The Absent One,* also attracted high proportions of ABC1 viewers.

Film preferences at the cinema amongst C2DE audiences covered a mix of genres from the top family film title *Smurfs: The Lost Village* to the low-budget horror film, *Happy Death Day*. The top films on television included action, crime, comedy and horror titles but with a notable absence of the family genre seen in the list of cinema preferences. The top six films on television in particular were overwhelmingly skewed to the C2DE audience with seven out of every 10 viewers from this group in the average audience, with this rising to nine out of 10 for the top film, *Police Academy 5: Assignment Miami Beach*, which was broadcast on Channel 5.

Table 11 Films with significant above-average audience profile amongst ABC1 viewers (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Jackie	80	10 Cloverfield Lane	Sky Cinema Premiere	75
Their Finest (UK)	79	Don't Breathe	Sky Cinema Premiere	74
Manchester by the Sea	79	Department Q: The Keeper of Lost Causes	BBC Four	73
La La Land	76	Life	Sky Cinema Premiere	71
Viceroy's House (UK)	75	Bill (UK)	BBC Four	70
Hidden Figures	75	Last Vegas	More4	70
Murder on the Orient Express (UK)	75	Love Actually (UK)	Sky Cinema Comedy	68
Victoria & Abdul (UK)	72	Department Q: The Absent One	BBC Four	68
Dunkirk (UK)	72	84 Charing Cross Road (UK)	BBC Two	68
The Death of Stalin (UK)	72	2001: A Space Odyssey (UK)	BBC Two	68
7yrs+ ABC1 average profile of all films	61	7yrs+ ABC1 average profile of all films on TV		45
7yrs+ ABC1 in survey population	55	7yrs+ ABC1 in total TV audience		45

Source: CAA Film Monitor

See notes to Table 3.

Table 12 Films with significant above-average audience profile amongst C2DE viewers (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Smurfs: The Lost Village	59	Police Academy 5: Assignment Miami Beach	ITV4	90
All Eyez on Me	57	Kangaroo Jack	Channel 5	85
Happy Death Day	56	Enter the Dragon	5Spike	84
Annabelle: Creation	54	Eraser	ITV4	83
My Little Pony: The Movie	53	Sleepy Hollow	Channel 4	82
Power Rangers	52	Mutiny on the Buses (UK)	ITV3	79
Peppa Pig: My First Cinema Experience (UK)	52	Millions (UK)	Film4	78
Geostorm (UK)	51	The House of Magic (UK)	Film4	77
The Fate of the Furious	50	Twilight Saga: Breaking Dawn - Part 1	E4	76
Girls Trip	49	Dawn of the Planet of the Apes	Film4	76
7yrs+ C2DE average profile of all films	39	7yrs+ C2DE average profile of all films on TV		55
7yrs+ C2DE in survey population	45	7yrs+ C2DE in total TV audience		55

Source: CAA Film Monitor

See notes to Table 3.

FILM PREFERENCES BY NATION

Tables 13-15 show the top 10 films with the highest average % of group in the total audience by nation for all films released in cinemas in 2017 – and captured in the Cinema Advertising Association Film Monitor – compared with the equivalent for all films transmitted on television. The Film Monitor survey does not include Northern Ireland.

British films feature in every top 10 cinema and television list for England, Scotland and Wales, with England showing the greatest preference for UK films at the cinema and Scotland showing the greatest preference for UK films on television. Four of the top 10 films at the cinema with above-average English audiences were UK films, two of which – *Dunkirk* and *Goodbye Christopher Robin* – were independent UK titles. Action was the most popular genre for in-cinema titles, while dramas and romantic comedies were the most popular genres on television. England was the only one of the three nations to feature a musical in its top 10 cinema list: the multi-Oscar® winning *La La Land*.

Traditionally, films with local themes or characters often attract sizeable above-average audiences in Scotland. In 2017, Scottish viewers made up a quarter of the total audience compared with their representation of 8% in the population, for *T2 Trainspotting*, set and filmed in and around Edinburgh. Two Scottish-set films also indexed highly amongst television audiences with the musical *Sunshine on Leith* and the original *Trainspotting* (both also set in and around Edinburgh) amongst the top three films with above-average audiences in Scotland. Overall, crime and horror titles were the most popular genres with Scottish audiences for films at the cinema, while preferences on television were more mixed. *Sunshine on Leith*, which features songs written by the Scottish group The Proclaimers was the only musical to feature in the three top 10 television lists. All four of the UK films in the television list are UK independent titles.

Drama was the most popular genre for cinema audiences in Wales which also showed a preference for action, fantasy, horror and comedy titles. Interestingly, there are two biopics in the cinema list: the Tupac Shakur life story *All Eyez on Me* and *Hacksaw Ridge*, the story of US conscientious objector and Medal of Honor recipient Desmond Doss, which starred British-American actor Andrew Garfield. Welsh preferences for films on television, which included the crime caper *Keeping up with the Joneses*, included a broad range of genres.

Table 13 Films with significant above-average audience profile amongst 7+ age group in England, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
xXx: Return of Xander Cage	94	Parenthood	ITV	98
Atomic Blonde	92	Pretty Woman	BBC One	97
La La Land	92	Quo Vadis	BBC Two	96
Blade Runner 2049 (UK)	91	The Other Man (UK)	BBC One	96
Split	91	What Doesn't Kill You	BBC One	96
Dunkirk (UK)	91	One Fine Day	Film4	95
Goodbye Christopher Robin (UK)	91	Captain Corelli's Mandolin (UK)	ITV	95
Captain Underpants: The First Epic Movie	90	No Strings Attached	BBC One	94
My Little Pony: The Movie	90	War of the Worlds	Film4	94
Assassin's Creed (UK)	90	The Secret of My Success	BBC One	94
7yrs+ England average profile of all films	82	7yrs+ England average profile of all films on TV		83
7yrs+ England in survey population	85	7yrs+ England in total TV audience		83

Source: CAA Film Monitor
See notes to Table 3.

Table 14 Films with significant above-average audience profile amongst 7+ age group in Scotland, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
T2 Trainspotting (UK)	25	Sunshine on Leith (UK)	Channel 4	22
Geostorm (UK)	15	The History Boys (UK)	BBC Two	21
Logan Lucky	14	Trainspotting (UK)	Channel 4	21
Smurfs: The Lost Village	13	North by Northwest	BBC Two	21
A Dog's Purpose	13	Zombieland (Channel 4)	Channel 4	20
Jigsaw	13	The Hatton Garden Job (UK)	Sky Cinema Premiere	20
It	13	Nanny for Christmas	Channel 5	20
The Snowman (UK)	13	Independence Day	Channel 5	20
Annabelle: Creation	12	Locked Away	Channel 5	19
Fifty Shades Darker	12	Confessions of a Shopaholic	BBC Two	19
7yrs+ Scotland average profile of all films	9	7yrs+ Scotland average rofile of all films on TV		9
7yrs+ Scotland in survey population	8	7yrs+ Scotland in total TV audience		9

Source: CAA Film Monitor
See notes to Table 3.

Table 15 Films with significant above-average audience profile amongst 7+ age group in Wales, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Snatched	17	Keeping up with the Joneses	Sky Cinema Premiere	14
All Eyez on Me	16	The Trust	Sky Cinema Premiere	14
A Dog's Purpose	13	The Haunting	Film4	14
The Great Wall	13	Escape to Athena (UK)	BBC Two	13
Going in Style	13	The Rebound	BBC One	13
King Arthur: Legend of the Sword (UK)	13	The Riot Club (UK)	Film4	12
Lion (UK)	13	The Hound of the Baskervilles	Film4	11
Pitch Perfect 3	12	Just Go With It	Channel 5	11
My Cousin Rachel (UK)	12	Spies Like Us	Channel 5	11
Hacksaw Ridge	12	See Spot Run	ITV2	11
7yrs+ Wales average profile of all films	9	7yrs+ Wales average profile of all films on TV		5
7yrs+ Wales in survey population	7	7yrs+ Wales in total TV audience		5

Source: CAA Film Monitor

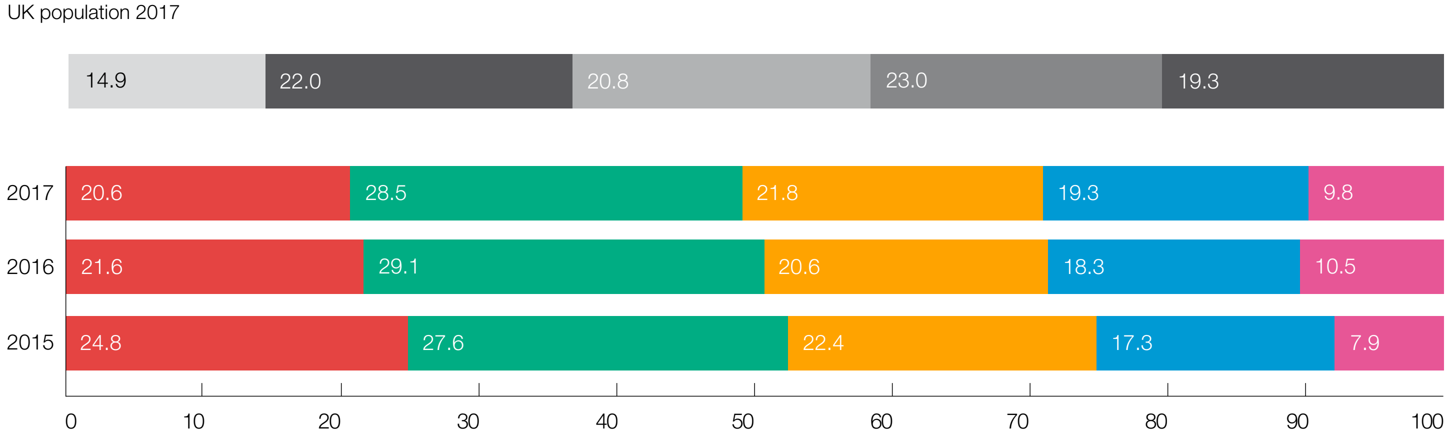
See notes to Table 3.

SUBSCRIPTION VIDEO ON DEMAND

There has been a rapid take-up of SVoD services in the UK in recent years, with over 11 million households now having access to one or more these services (see the Home Entertainment chapter). Early adopters of new technologies tend to be young and male, and this was certainly true in the initial days of SVoD availability in the UK. As Figure 6 demonstrates, whilst the age profile of SVoD users has gradually moved to be more representative of the UK population, subscribers remain predominantly young in comparison with the general population. In 2017, users aged 18-34 made up 49% of the SVoD audience compared with 37% for the UK as a whole.

In terms of gender and socio-economic status, the overall SVoD audience skews slightly more male and slightly more affluent than the general population. Interestingly, the socio-economic profile indicates that as adoption has increased, the audience has become slightly more upmarket. This might be due to the appeal of exclusive original British series such as *The Crown* on Netflix and *The Grand Tour* on Amazon Prime, as well as a recent broadening of the content offer to include more original documentaries and arts programming which typically appeal to an older and more affluent demographic.

Figure 6 UK SVoD audience profile by age, 2015-2017



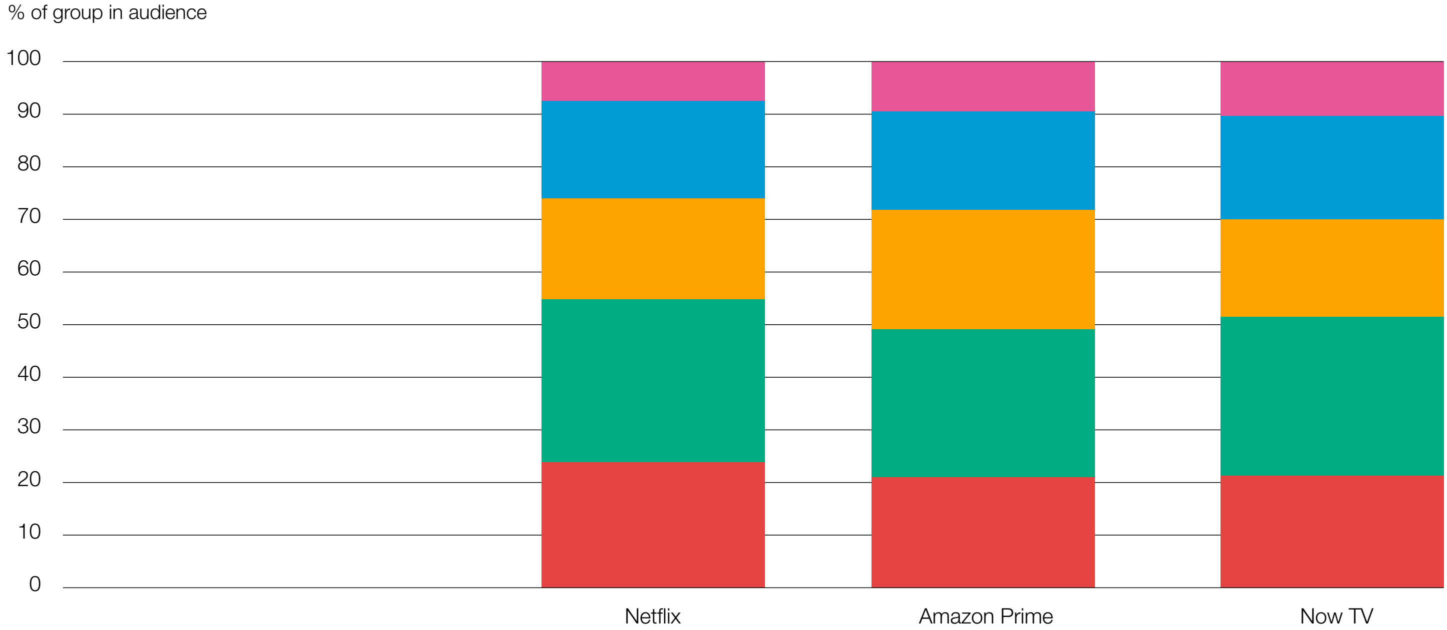
	2015	2016	2017
Age 18-24	24.8	21.6	20.6
Age 25-34	27.6	29.1	28.5
Age 35-44	22.4	20.6	21.8
Age 45-54	17.3	18.3	19.3
Age 55-64	7.9	10.5	9.8
Men	53.0	50.3	51.2
ABC1	59.4	62.6	60.8

Source: Ampere Analysis, Consumer Surveys 2015-2017, UK adults 18-64. Base: 2015 (330), 2016 (788), 2017 (2,244)
Note: UK population weighted to represent 18-64 year olds.

AUDIENCE PROFILE FOR SELECTED SVoD SERVICES

Whilst there is a growing number of subscription on-demand and streaming services available to UK audiences, the market is dominated by three main providers. Netflix remains the largest and by Quarter 4, 2017 was available in 8.2 million UK homes, with Amazon Prime Video the second largest (4.3 million homes). Now TV, Sky's wholly owned platform, is the smallest of the three with around 1.5 million subscriber homes (Q4, 2017). The profile of users is fairly similar for all three services, with only small differences between them. Compared to the UK population, audiences for all three services skew young. Netflix has the youngest profile with 54.8% of its audience aged under 35. Now TV has slightly broader appeal by age and is also the most female. All three skew slightly to the more affluent socio-economic grades.

Figure 7 Audience profile of selected SVoD services in the UK by age, 2017



	Netflix	Amazon Prime	Now TV
Age 18-24	23.9	21.0	21.3
Age 25-34	30.9	28.1	30.2
Age 35-44	19.2	22.7	18.5
Age 45-54	18.5	18.7	19.6
Age 55-64	7.5	9.5	10.4
Men	50.8	52.5	47.2
ABC1	59.4	62.6	60.8

Source: Ampere Analysis, Consumer Survey 2017, UK adults. Base: (2,244)
Note: This is the profile of all users, not those that watch film.

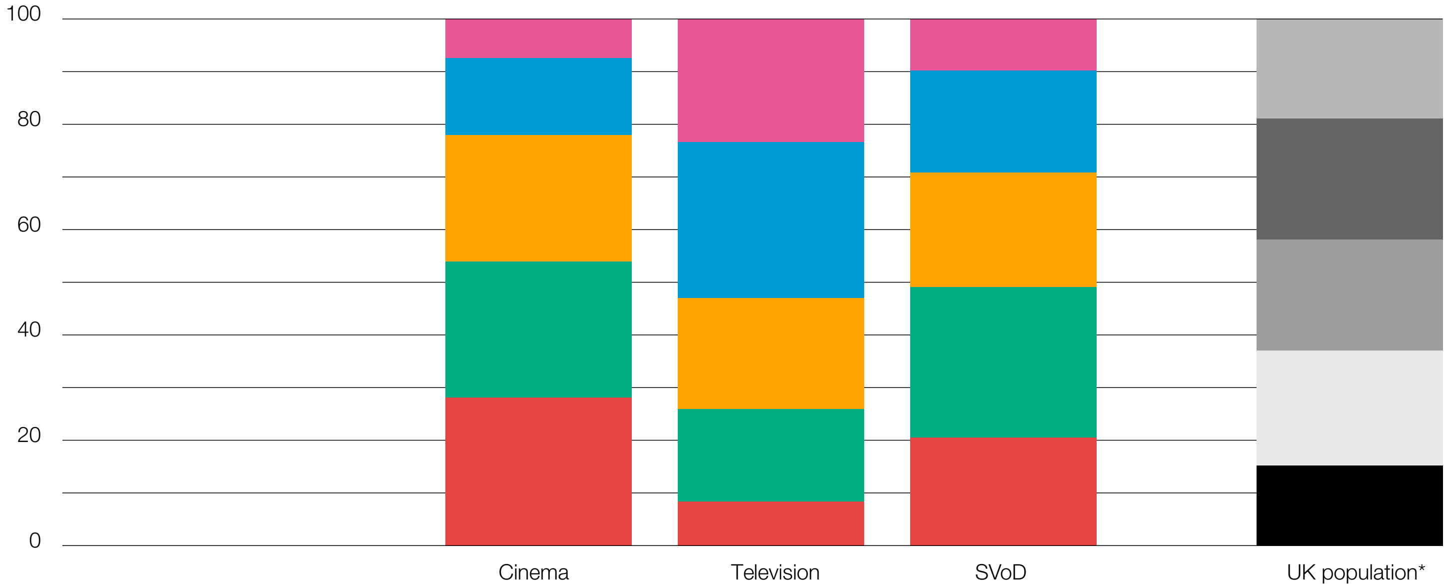
AUDIENCE PROFILE COMPARATIVE ANALYSIS

This chapter has focused on comparing the demographic profile of the audience for the three most popular platforms that show film as well as the demographic preferences of audiences for films on two of these: cinema and television. However, due to the different methodologies used to collect the data and to the different base definitions of respondents, it is difficult to draw real comparisons between them. The following chart 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 is for all content watched on these platforms, including high-end television series, so is not exclusively based on a 'film only' audience.

Cinema delivers the youngest skewing audience profile, with 54% aged between 18 and 34 and only 7.4% aged 55-64. The age profile for television is almost a mirror image of this, with 54% of the audience aged 45-64 and only 8.4% aged 18-24. This underlines the difference between the 'going out' experience of cinema and the 'staying in' nature of television. Whilst we know from other data sources that both platforms have the ability to deliver significant audience numbers for watching film, the preference of cinema or television relates not just to the choice of film, but to the viewing experience it delivers. The SVoD audience also skews young and suggests that viewing film on SVoD platforms is complementary to seeing films in the cinema and thus more likely to compete with watching films on television than with cinema-going.

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

Figure 8 Comparative UK audience profiles, cinema, television and SVoD, 2017



	Cinema	Television	SVoD	UK population*
Age 18-24	28.2	8.4	20.6	15.2
Age 25-34	25.8	17.5	28.5	21.9
Age 35-44	24.0	21.1	21.8	21.0
Age 45-54	14.6	29.7	19.3	23.0
Age 55-64	7.4	24.3	9.8	19.1
Men	51.2	51.0	51.2	50.5
ABC1	60.9	44.0	60.8	54.0

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

Notes: CAA data based on all films released in 2017 and which achieve a base size of more than 100 respondents in the CAA's annual Film Monitor research. Titles (81), Base (13,713).

BARB/Techedge data filtered on all titles transmitted on all BARB subscribed channels in 2017, where a single title is transmitted on more than one channel it is counted once Titles (7,323), UK adults (18-64), Base (6,668).

Ampere Analysis Consumer Survey 2017, Audience profile for all UK SVoD services, Base (2,244).

* Based on adults aged 18-64.

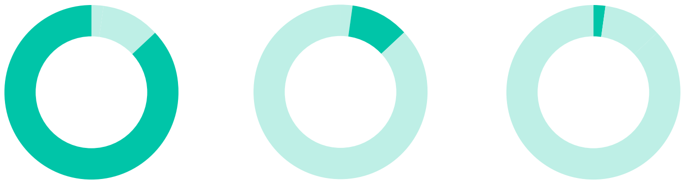
SCREEN SECTOR CERTIFICATION AND PRODUCTION

Image: *Stockholm, My Love* courtesy of BFI Distribution

FACTS IN FOCUS

FEATURE FILM PRODUCTION ACTIVITY IN THE UK IN 2017

73 inward investment films	174 UK domestic films	18 co-productions
UK spend **£1.8 billion**	UK spend **£221 million**	UK spend **£31 million**

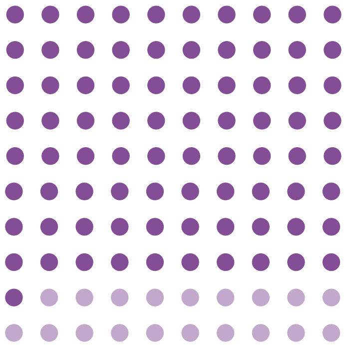


TOTAL UK SPEND OF FEATURE FILMS IN 2017

£2 billion

a record high – up 17% on 2016

BIG BUDGET FEATURES



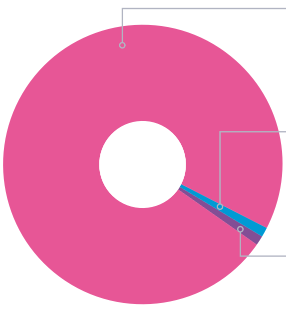
29 big budget features (£30 million or over) accounted for **81%** of total UK film production spend

FILM PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

2017: **294** film projects, **£2.7 billion** (estimated total budget)

2016: **276** film projects, **£1.6 billion** (estimated total budget)

PRODUCTION VALUE OF UK QUALIFYING TELEVISION PROGRAMMES IN 2017



97 high-end television projects; **UK spend £985 million**

28 animation television projects; **UK spend £62 million**

18 children's television projects; **UK spend £55 million**

TELEVISION PRODUCTIONS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

£778 million estimated budget

Down 9% on 2016

209 television projects received final certification as officially British in 2017, **up from 157 in 2016**

PRODUCTION VALUE OF UK QUALIFYING VIDEO GAMES IN 2017

41 video game projects;

£132 million

UK SPEND

VIDEO GAME PROJECTS GIVEN FINAL CERTIFICATION AS OFFICIALLY BRITISH

2017: **212** video games, **£278** million (estimated total budget)

2016: **189** video games, **£225** million (estimated total budget)

SCREEN SECTOR CERTIFICATION AND PRODUCTION

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 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 2017, including *Assassin's Creed, Breathe* and *Three Billboards Outside Ebbing, Missouri.*

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 2017, 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 2017 included *Dough, Message from the King* and *Stockholm, My Love.*

TELEVISION PROGRAMMES

In 2013, the UK government introduced tax reliefs for high-end television (HETV) and animation programmes with the aim of boosting production investment in these creative sectors. (The cultural test for HETV programmes was revised in 2015.) Tax relief for children's television production was introduced in April 2015. To qualify as an official British HETV, animation or children's television production, projects must pass either the relevant cultural test (under Part 15A of the Corporation Tax Act 2009, as amended) or be certified as an official co-production under one of the UK's bilateral co-production agreements which allow television co-production. At the end of 2017, these were with Australia, Canada, China, Israel, New Zealand, the Occupied Palestinian Territories and South Africa.

HETV productions receiving final certification in 2017 included *The Child in Time* (single drama), Stan Lee's *Lucky Man* – Series 2 (10 episodes) and *The White Princess* (8 episodes). Animation and children's television productions qualifying as officially British in the year included *Rank the Prank* (13 episodes), *Revolting Rhymes* (2 episodes) and *Y Gemau Gwyllt* (8 episodes).

VIDEO GAMES

In 2014, the UK government extended creative sector tax reliefs to include video games development. As with the other screen sector reliefs, 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.

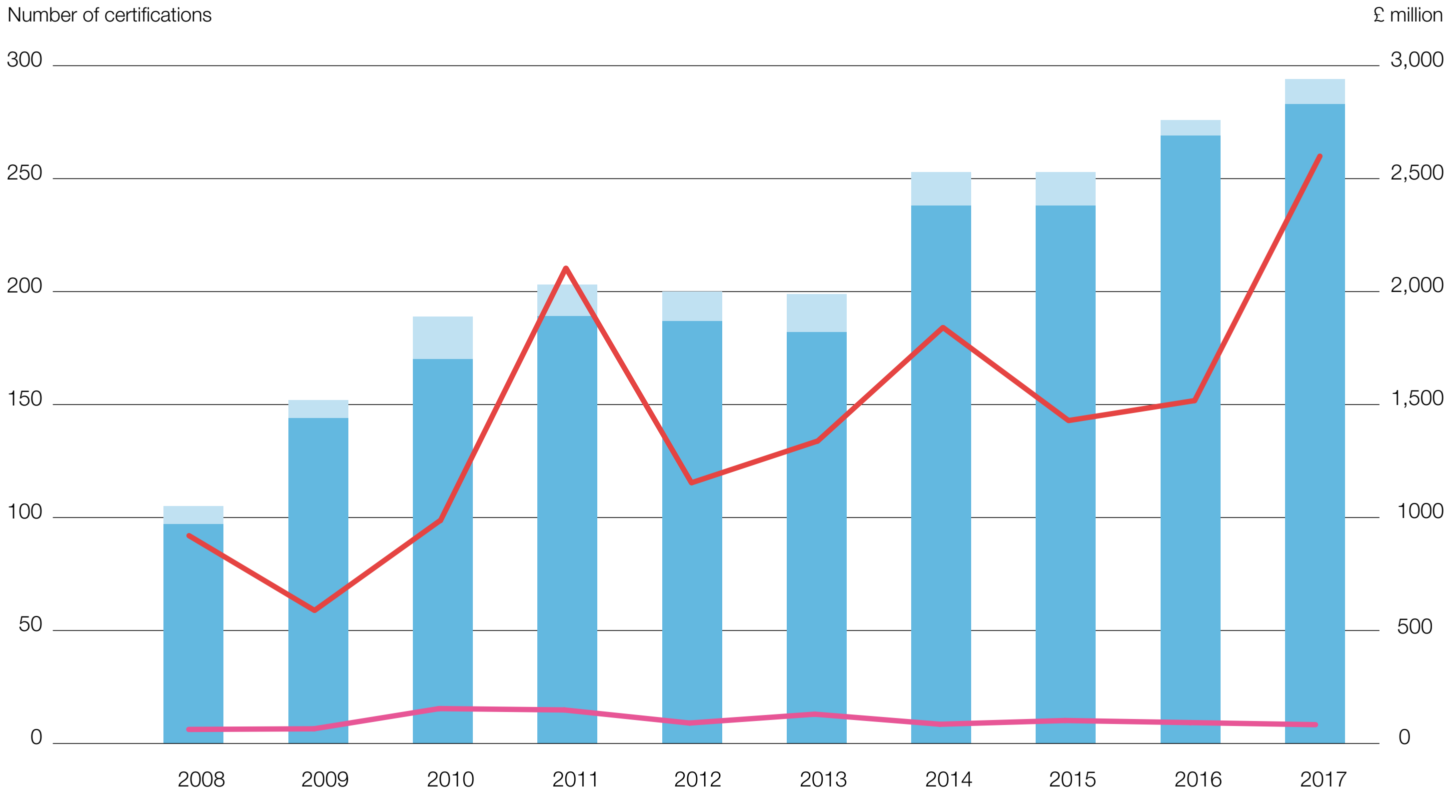
Video games awarded final certification in 2017 included *Hellblade: Senua's Sacrifice, LEGO Star Wars – the Force Awakens* and *Sea Hero Quest.*

FILMS WITH FINAL CERTIFICATION, 2008-2017

Due in part to a competitive tax regime, the number of UK films receiving final certification has risen sharply over the 10-year period, 2008-2017. As Figure 1 shows, the number of finally certified films in 2017 (294) was almost three times larger than in 2008 (105). There has also been a strong upward trend in the overall production budget associated with these films, which has risen from £980 million in 2008 to £2.7 billion in 2017. This increase, particularly in the last few years, is due primarily to a rise in the numbers of very high budget UK studio-backed films that have been based in the UK. (UK studio-backed films are wholly or partly financed and controlled by US studios but which feature UK cast, crew, locations, facilities, post-production and often UK source material.)

The numbers and overall budgets of co-productions with final certification have remained low throughout the period. (The volume of co-production activity in the UK fell dramatically after 2007 following a tightening in co-production certification requirements and the introduction of a new film production tax relief based on a film's UK spend rather than the entirety of the production budget.) Fewer than 20 co-productions have been awarded final certification in any given year over the course of the period.

Figure 1 Number and production budget of films with final certification, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of final certifications										
Cultural test	97	144	170	189	187	182	238	238	269	283
Co-production	8	8	19	14	13	17	15	15	7	11
Total	**105**	**152**	**189**	**203**	**200**	**199**	**253**	**253**	**276**	**294**
Production budget (£ million)										
Cultural test	935.1	604.8	1,001.7	2,118.3	1,169.7	1,353.3	1,855.9	1,444.9	1,532.7	2,614.7
Co-production	45.2	48.0	137.4	131.4	73.5	112.7	68.2	84.6	75.4	66.2
Total	**980.3**	**652.8**	**1,139.1**	**2,249.7**	**1,243.2**	**1,466.0**	**1,924.2**	**1,529.5**	**1,608.1**	**2,680.9**

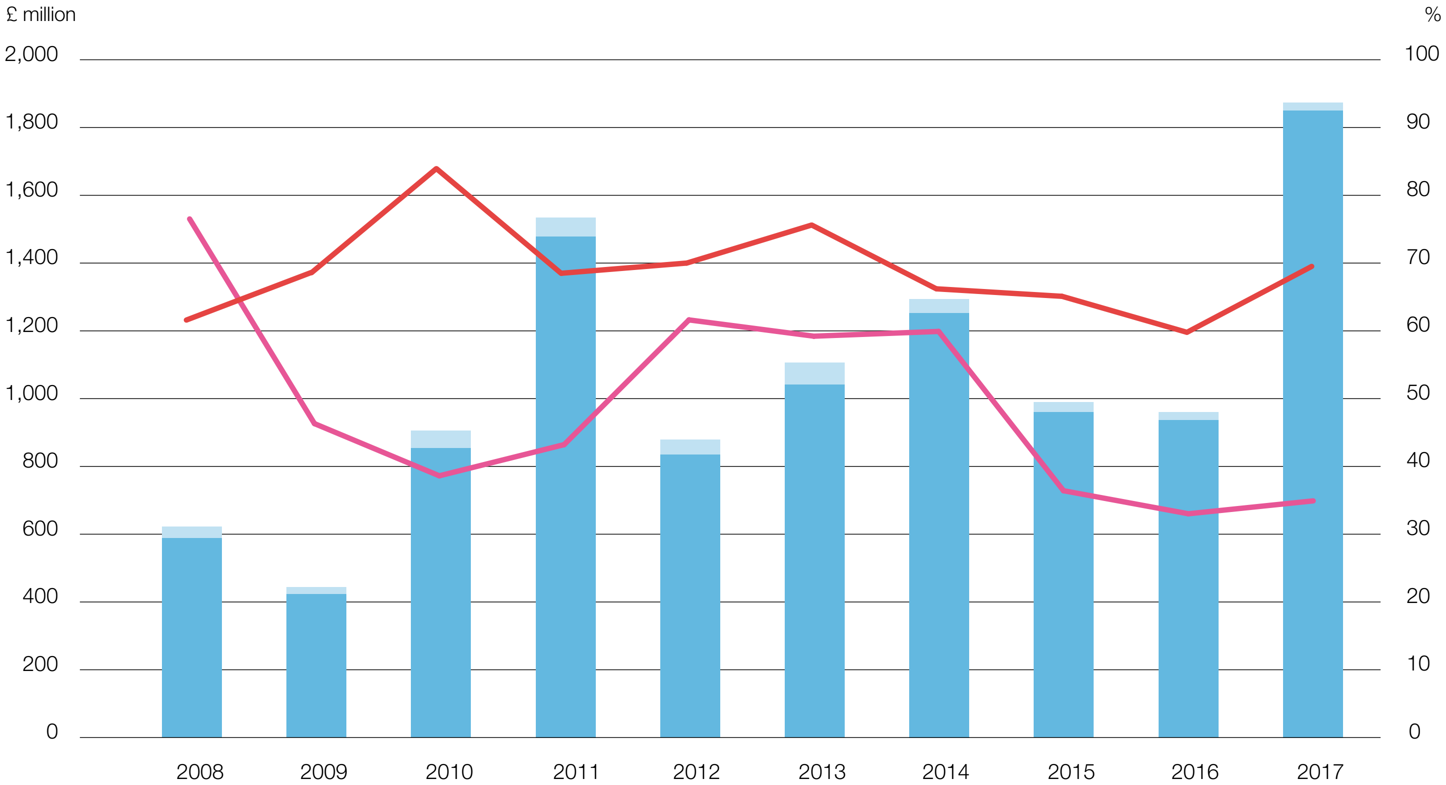
Source: DCMS, BFI

Note: 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.

Figure 2 shows the levels of UK spend[1] associated with films receiving final certification between 2008 and 2017. Although the latest cultural test amendments allow wider EEA 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.

There has been a general upward trend in the overall level of UK spend, peaking in 2017 at £1.8 billion. While the aggregate UK spend of co-productions has always been less than that of cultural test films, there has been an overall downward trend in UK production value for films in this category over the period. In 2017, cultural test films accounted for 99% of the overall UK spend of films with final certification, compared with 95% in 2008.

Figure 2 UK spend of films with final certification and UK spend as % of total budget, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK spend										
Cultural test	588.5	422.9	853.8	1,478.5	834.2	1,041.2	1,252.8	959.9	936.3	1,850.3
Co-production	34.0	21.6	51.3	55.0	44.3	65.3	40.0	29.7	23.9	22.2
Total	**622.5**	**444.6**	**905.1**	**1,533.5**	**878.5**	**1,106.5**	**1,292.8**	**989.6**	**960.2**	**1,872.5**
UK spend as % of total production budget										
Cultural test	62.9	69.9	85.2	69.8	71.3	76.9	67.5	66.4	61.1	70.8
Co-production	75.2	45.0	37.3	41.9	60.3	57.9	58.6	35.1	31.7	33.6

Source: DCMS, BFI

See note to Figure 1.

[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.

BUDGET DISTRIBUTION OF FILMS WITH FINAL CERTIFICATION, 2008-2017

Figure 3 shows the median budgets of films receiving final certification between 2008 and 2017. For the first two years of the period, the median budget for cultural test films was £1 million. Since then, as the number of these films has increased, the median budget has fallen steeply, plateauing at £300,000-£500,000 from 2010. The median budget for co-productions has been more varied over the period, peaking in 2009 at £6.3 million and with a low of £2.8 million in 2012. The peak is likely to be due to the very low numbers of films certified in that year, because with low numbers the median is more susceptible to the effects of individual budgets. In 2017, the median budget for co-productions was £5.7 million, the second highest figure of the period.

Figure 3 Median budgets of films with final certification, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Cultural test	1.0	1.0	0.4	0.5	0.4	0.4	0.4	0.4	0.3	0.3
Co-production	3.8	6.3	4.4	3.8	2.8	3.7	4.0	3.8	4.8	5.7

Source: BFI

Notes:

The median is the middle value, ie there are equal numbers of films above and below the median.

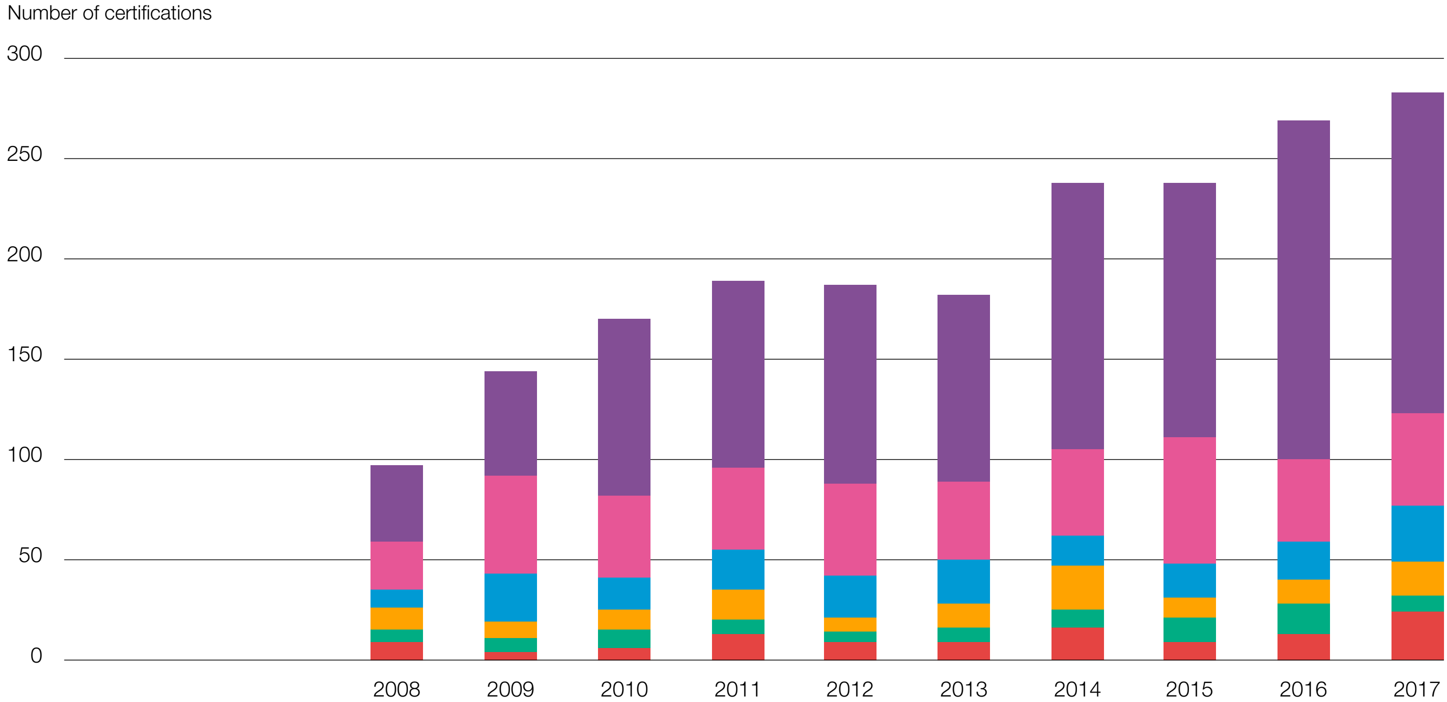
Data updated since publication of the 2017 Yearbook.

See note to Figure 1.

Figure 4 shows that one reason for the decrease in the median budget for cultural test films is the growth in the number of very low budget (under £500,000) productions being awarded final certification. This growth suggests that UK tax relief has become more accessible to low budget filmmakers following the introduction of the cultural test in 2007. At the same time, the total number of high budget (over £10 million) films with final certification has increased over the period. From 2008 there were generally around 15 such films per year, but there have been over 20 of these films each year since 2014. These figures may, in part, be due to the recent changes to qualifying spend thresholds in the tax relief rules.

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

Figure 4 Films with final cultural test certification by budget band, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
≥£30 million	9	4	6	13	9	9	16	9	13	24
£10 - £29.9 million	6	7	9	7	5	7	9	12	15	8
£5 - £9.9 million	11	8	10	15	7	12	22	10	12	17
£2 - £4.9 million	9	24	16	20	21	22	15	17	19	28
£0.5 - £1.9 million	24	49	41	41	46	39	43	63	41	46
<£0.5 million	38	52	88	93	99	93	133	127	169	160
Total	**97**	**144**	**170**	**189**	**187**	**182**	**238**	**238**	**269**	**283**

Source: DCMS, BFI

Table 1 shows the distribution of budgets by budget band for films certified under the cultural test in the period. The 6% of films with budgets of £30 million or over accounted for 77% of the aggregate budget, while the 74% of films with budgets of under £2 million accounted for only 4% of the aggregate budget. This reflects both the growth in the overall number of low budget cultural test films and of big budget inward investment titles in the top budget band. (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, eg locations, and/or the UK's filmmaking infrastructure and/or UK film tax relief.)

Table 1 Films with final cultural test certification, budget distribution by budget band, 2008-2017

Budget band (£ million)	Number	% number	Total budget (£ million)	% budget
≥30	112	5.6	11,228	76.7
10 - 29.9	85	4.3	1,296	8.9
5 - 9.9	124	6.2	892	6.1
2 - 4.9	191	9.6	608	4.2
0.5 - 1.9	433	21.7	435	3.0
<0.5	1,052	52.7	172	1.2
Total	**1,997**	**100.0**	**14,631**	**100.0**

Source: DCMS, BFI

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

The budget distribution for finally certified co-productions between 2008 and 2017 was much more evenly spread by budget band than that for cultural test films (Table 2). The majority of the aggregate budget (82%) is associated with films in the £2 million - £29.9 million range, whereas films budgeted at £30 million or over account for only 14% of the total budget, compared with 77% for cultural test films. The table also highlights the small proportion of very low budget co-productions (6%), a marked contrast with cultural test films.

Table 2 Films with final co-production certification, budget distribution by budget band, 2008-2017

Budget band (£ million)	Number	% number	Total budget (£ million)	% budget
≥30	3	2.4	120	14.3
10 - 29.9	20	15.7	320	38.0
5 - 9.9	32	25.2	231	27.4
2 - 4.9	41	32.3	141	16.7
0.5 - 1.9	24	18.9	29	3.4
<0.5	7	5.5	2	0.2
Total	**127**	**100.0**	**842**	**100.0**

Source: DCMS, BFI

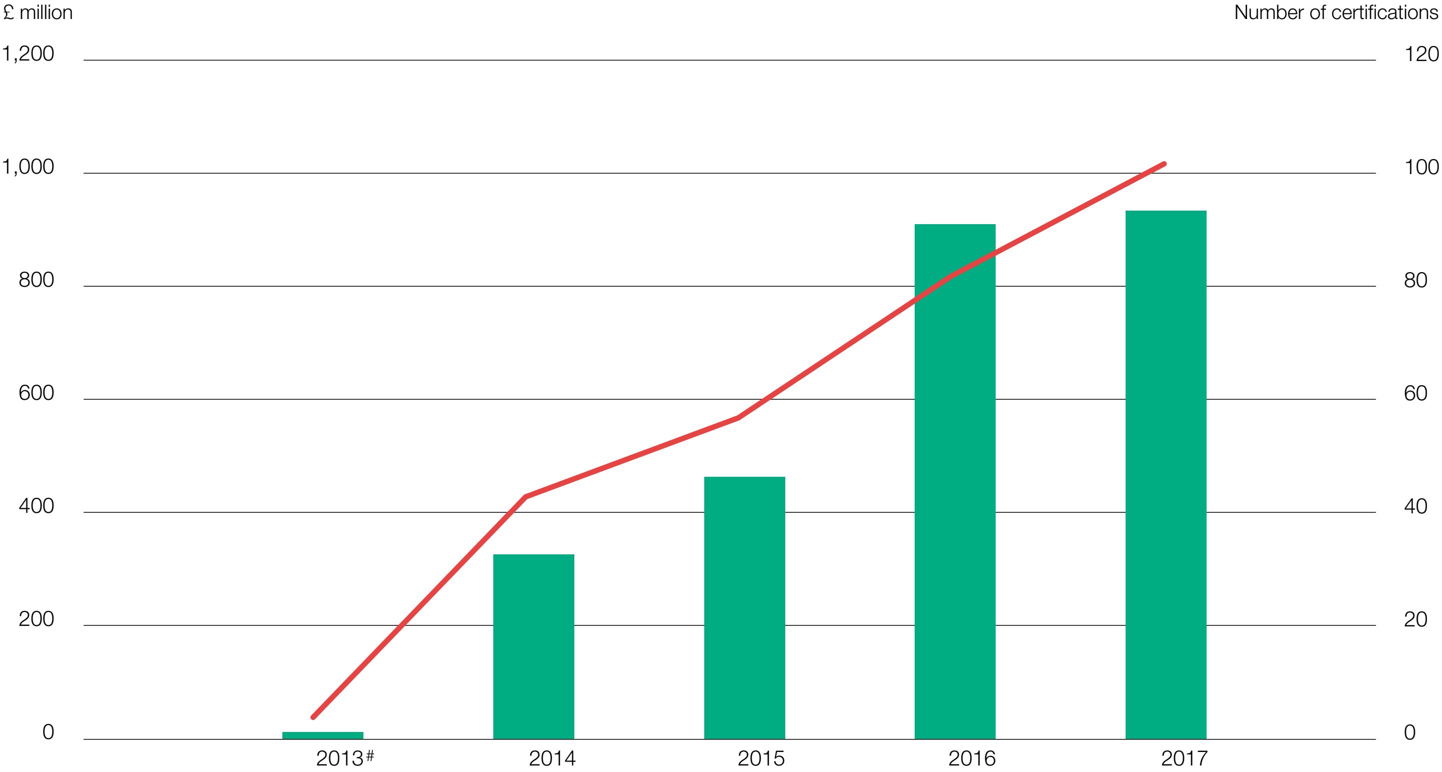
Note: Figures/percentages may not sum to totals due to rounding.

HIGH-END TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2013-2017

The number of HETV productions receiving final certification as British under the cultural test has increased year on year since the tax relief was introduced in 2013 (Figures 5 and 6). In 2017, 103 qualifying HETV productions, with a total combined budget of £935 million, received final certification, up from 83 projects, with a total budget of £912 million, in 2016. However, the UK spend associated with these projects decreased from £769 million in 2016 to £676 million. As a percentage of total budget, the UK spend associated with these projects also fell, from 84% in 2016 to 72%.

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

Figure 5 Total budget and number of HETV productions* with final cultural test certifications, 2013-2017



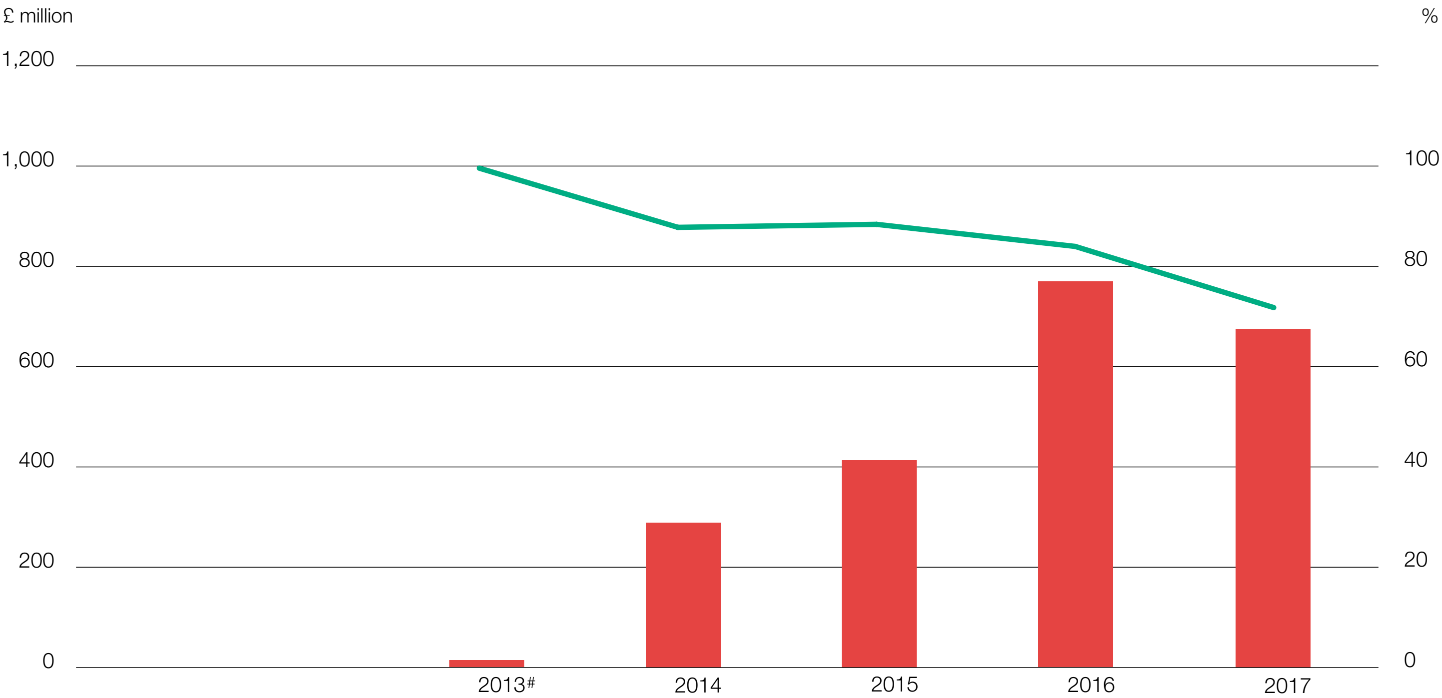
	2013#	2014	2015	2016	2017
Total budget (£ million)	13.2	326.9	464.7	911.5	935.1
Number	5	44	58	83	103

Source: DCMS, BFI

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

The data for 2013 cover the period April – December.

Figure 6 UK spend of HETV productions* with final cultural test certification and UK spend as % of total budget, 2013-2017



	2013#	2014	2015	2016	2017
UK spend (£ million)	13.2	288.2	412.7	768.9	675.5
UK spend as % of total budget	100.0	88.2	88.8	84.4	72.2

Source: DCMS, BFI

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

The data for 2013 cover the period April – December.

Over the period, the average median budget per minute of HETV productions receiving final certification under the cultural test was around £20,000. In 2017, the median budget was £22,764.

Table 3 Median budgets of HETV productions* with final cultural test certification, 2013-2017

Year	Median budget per minute (£)
2013#	15,786
2014	21,253
2015	20,866
2016	22,818
2017	22,764

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of productions above and below the median.

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

The data for 2013 cover the period April – December.

Image: *Stan Lee's Lucky Man* courtesy of Carnival Film & Television Limited

ANIMATION TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2014-2017

As Table 4 shows, a total of 41 animation television productions received final certification as British under the cultural test in 2017, up from 38 productions in 2016, and the second highest number of the period 2014-2017. (Data for 2013 is not shown to avoid disclosing the UK spend and budgets of individual productions.) The combined total budget of finally certified animations in 2017 was £52 million, down from £62 million in 2016, but the associated UK production value increased slightly from £44.5 million in 2016 to £45 million. At 86%, the UK spend associated with these projects as a percentage of total budget in 2017 was the highest of the period.

As the number of animation television productions receiving final certification under the UK's co-production treaties has 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 2017, the median budget was £5,384.

Table 4 Animation television productions* with final cultural test certifications, 2014-2017

	2014	2015	2016	2017
Number	14	51	38	41
UK spend (£ million)	10.5	62.2	44.5	45.1
Total budget (£ million)	21.5	86.4	62.2	52.4
UK spend as % of total budget	49.0	72.0	71.6	86.0
Median budget per minute (£)	7,043	6,851	8,044	5,384

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of productions above and below the median.

Data updated since publication of the 2017 Statistical Yearbook.

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

CHILDREN'S TELEVISION PROGRAMME FINAL CERTIFICATIONS, 2016 AND 2017

The number of children's television programmes receiving final certification as British under the cultural test in 2017 was almost double the total in 2016 (Table 5). There were 65 final certifications in 2017, with an associated total budget of £50 million, compared with 36 certifications in 2016 with an associated budget of just over £25 million. The UK production value of these projects also increased, from £25 million in 2016 to £46 million. The UK spend as a percentage of total budget was higher for children's television projects than the other production categories in this analysis; it was 99% in 2016 and 93% in 2017. (Data for 2015 is not shown to avoid disclosing the UK spend and budgets of individual productions.)

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

The median budget per minute for children's television productions certified under the cultural test in 2017 was £1,793, a slight fall from the median in 2016 (£1,930).

Table 5 Children's television productions* with final cultural test certifications, 2016 and 2017

	2016	2017
Number	36	65
UK spend (£ million)	25.0	46.2
Total budget (£ million)	25.4	49.9
UK spend as % of total budget	98.5	92.6
Median budget per minute (£)	1,930	1,793

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of productions above and below the median.

Data updated since publication of the 2017 Statistical Yearbook.

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

VIDEO GAME FINAL CERTIFICATIONS, 2015-2017

A total of 212 video game projects received final certification as British in 2017 compared with 189 in 2016 (Table 6). The total budget for these projects was £278 million, up from £225 million in 2016, and the associated UK production value was £249 million, up from £202 million in 2016. The UK spend as a percentage of total budget for qualifying video game projects was 90% in both 2016 and 2017; it was 68% in 2015. (Data for 2014 is not shown to avoid disclosing the UK spend and budgets of individual projects.) Video games can only qualify as British for the purpose of the relief through the cultural test.

The median budget for video game projects with final certification in 2017 was £142,425.

Table 6 Video games with final cultural test certification, 2015-2017

	2015	2016	2017
Number	116	189	212
UK spend (£ million)	180.9	202.2	248.8
Total budget (£ million)	265.6	224.5	277.5
UK spend as % of total budget	68.1	90.1	89.7
Median budget (£)	110,902	168,469	142,425

Source: DCMS, BFI

Notes:

The median is the middle value, ie there are equal numbers of films above and below the median.

Data updated since publication of the 2017 Statistical Yearbook.

SCREEN SECTOR PRODUCTION IN THE UK

The remainder of this chapter looks at the value and volume of all feature film and UK qualifying television and video games production activity undertaken in the UK between 1994 and 2017. The data for individual years is not analogous with the certification statistics in the previous section as the latter cover only UK qualifying screen sector productions, and which 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.

THE VALUE OF UK FILM PRODUCTION

As Figure 7 shows, the aggregate UK spend of features that commenced principal photography in 2017 was £2 billion, the highest figure since our records began. This was the fourth year in a row to see record or near record values for UK film production activity. The high figures of these four years coincides with the extended tax relief for film introduced by the UK government in 2014.

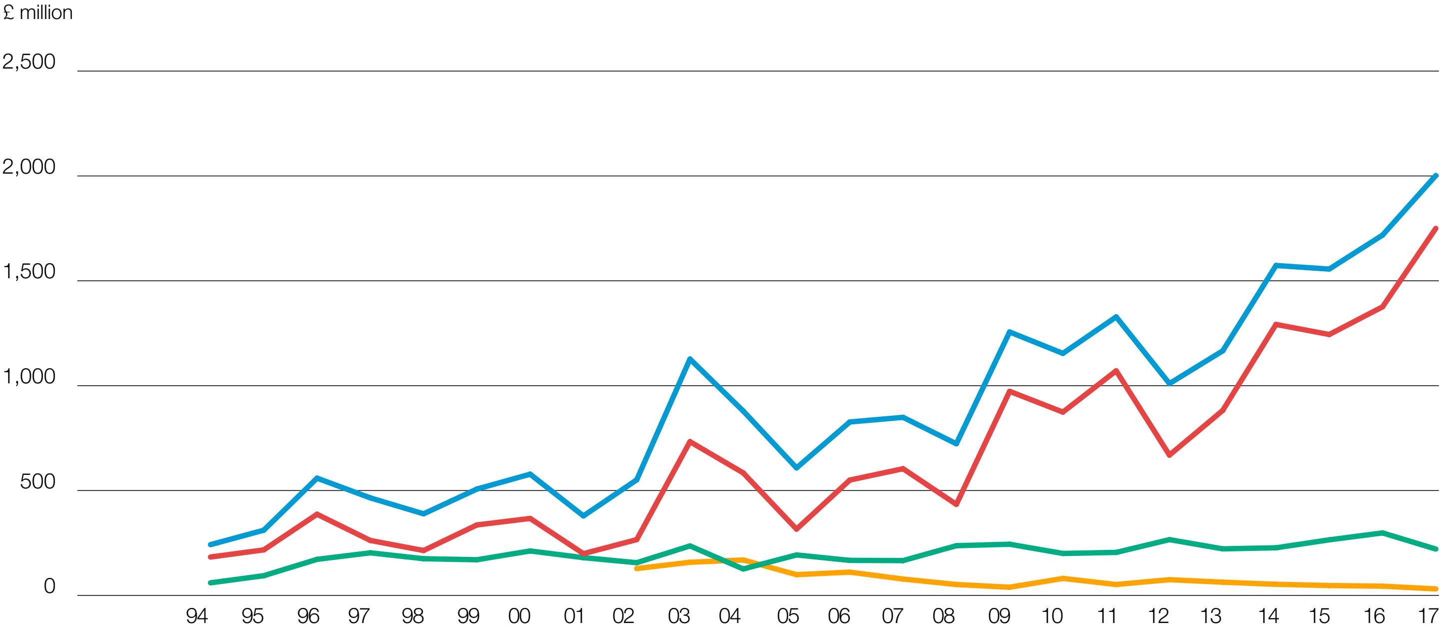
The increase in UK film production spend in the last few years is due primarily to a surge in inward investment films. In 2017, these films contributed a record-breaking £1.8 billion towards the total UK production value, an increase of 27% from £1.4 billion in 2016. The proportion of overall UK spend attributed to inward features was 87%, again a record high. Some of the big budget films contributing to this figure were *Avengers: Infinity War, Mamma Mia! Here We Go Again* and *Solo: A Star Wars Story.*

Domestic UK features, including *Johnny English Strikes Again, Mary Queen of Scots* and *Yardie*, had a UK production value of £221 million, down from £298 million in 2016. The UK spend of official and unofficial co-productions was £31 million, down from £44 million in 2016. Co-productions commencing principal photography in the year included *Born a King, Cold War* and *The Little Stranger.*

Figure 7 shows the degree to which both the growth and annual variation in the total value of UK spend since 1994 has been driven by inward investment and how it fluctuates from year to year. The UK spend of domestic UK films has been broadly stable over this period, with an average of around £195 million per year, while there has been a decline in the UK spend of co-productions. The decrease in the production value associated with co-productions reflects the fall in the numbers of films using this financing model following the government's tightening of co-production certification requirements and redesign of the post-2006 tax relief to accrue more benefit to the UK economy.

Table 7 distinguishes UK independent films from UK studio-backed films and non-UK films made partly or wholly in the UK. In 2017, UK independent films accounted for 31% of overall production spend in the UK, a decrease from 36%

Figure 7 UK spend of feature films produced in the UK, 1994-2017



	94	95	96	97	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17
Inward investment	183	217	387	262	214	336	367	199	266	733	584	316	550	604	434	973	874	1,071	669	882	1,292	1,244	1,376	1,750
Domestic	60	94	172	203	175	170	212	180	156	236	126	193	167	166	237	244	200	205	266	222	227	265	298	221
Co-production	-	-	-	-	-	-	-	-	128	158	169	99	111	78	52	39	81	52	75	63	53	47	44	31
Total	**242**	**311**	**559**	**465**	**389**	**507**	**578**	**379**	**551**	**1,127**	**879**	**608**	**827**	**849**	**723**	**1,256**	**1,154**	**1,328**	**1,010**	**1,166**	**1,573**	**1,556**	**1,718**	**2,002**

Source: BFI

Notes:

Data are rounded to the nearest £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 started or to the year in which the visual effects were undertaken in the case of VFX-only films.

Data for UK co-productions are not available by production year prior to 2002.

Inward investment feature films include inward co-productions from 2002 and VFX-only films.

Films with budgets under £500,000 are included after 2008.

Data updated since publication of the 2017 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 (eg 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.

in 2016. (A UK independent film is one produced without creative or financial input from the major US studio companies.)

Table 7 Value of UK spend of UK studio-backed* and UK independent films, 2008-2017, £ million

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK studio-backed films	429	955	845	1,039	669	770	1,015	1,147	1,095	1,379
UK independent films	291	296	289	280	333	392	556	404	620	621
Non-UK films	24	48	22	41	8	4	3	5	3	3
Total	**723**	**1,256**	**1,154**	**1,328**	**1,010**	**1,166**	**1,573**	**1,556**	**1,718**	**2,002**

Source: BFI

See notes to Figure 7.

* '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.

THE VOLUME OF UK FILM PRODUCTION

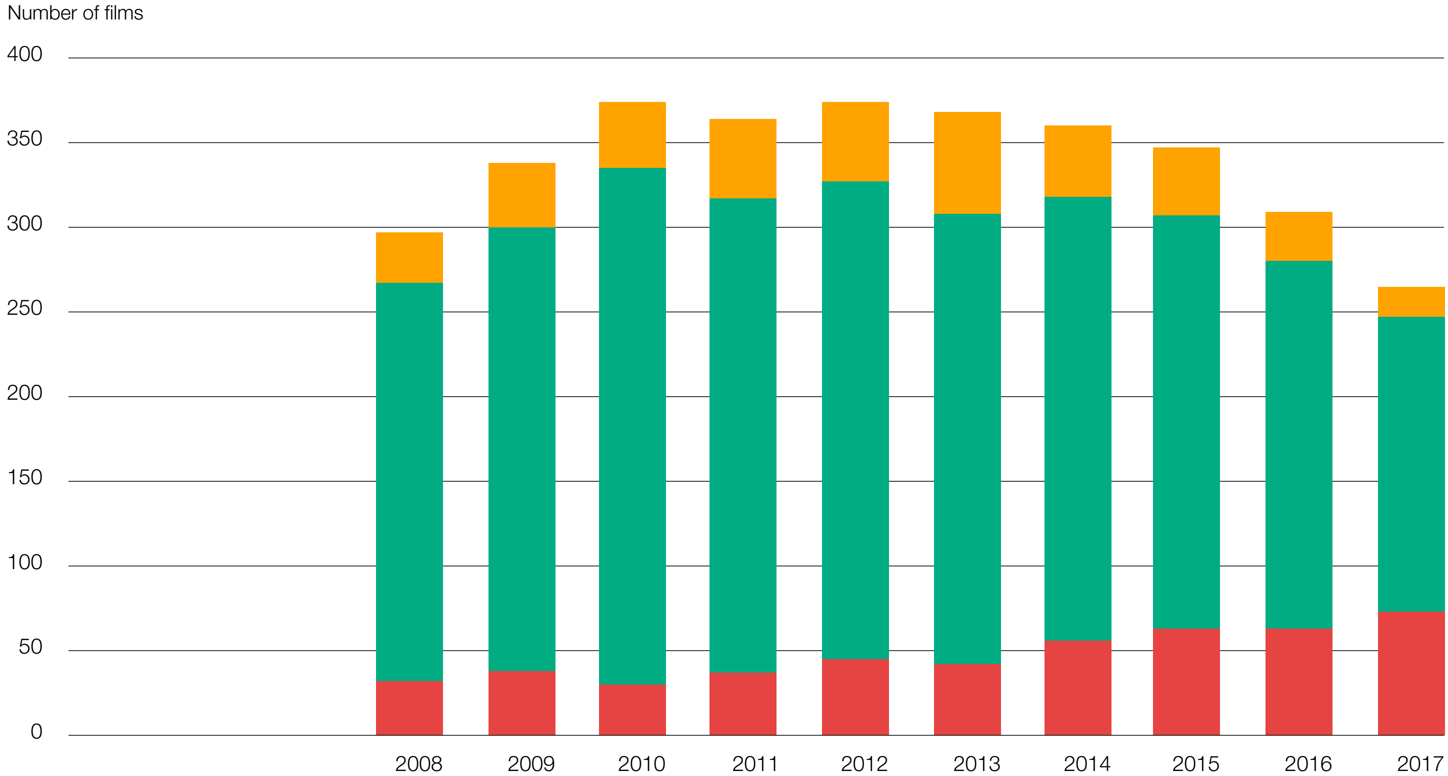
Image: *Mamma Mia! Here We Go Again* ©2017 Universal Studios. Courtesy of Universal Studios Licensing LLC

As Figure 8 shows, the number of films produced in the UK grew from 297 in 2008 to a peak of 374 in both 2010 and 2012. While the overall numbers have declined since then, inward investment films have seen year-on-year rises since 2014.

In 2017, 265 films were produced wholly or in part in the UK, down from 309 in 2016. Of these, 18 were co-productions, 174 were domestic UK features (of which 102 had budgets of less than £500,000) and 73 were inward investment films. The number of co-productions was the lowest of the 10-year period covered in the chart, but the largest year-on-year fall was in domestic UK features with budgets of less than £500,000, which were down from 130 in 2016. However, there is often a delay in acquiring full data on low and micro-budget feature film activity in the UK, and the numbers for the last few years are likely to be revised upwards.

Figure 8 Number of feature films produced in the UK, 2008-2017

We are unable to provide data for all individual categories of film produced wholly or in part in the UK in 2017 for



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Inward investment	**32**	**38**	**30**	**37**	**45**	**42**	**56**	**63**	**63**	**73**
Domestic UK	**235**	**262**	**305**	**280**	**282**	**266**	**262**	**244**	**217**	**174**
Of which budget ≥ £500,000	82	90	77	91	77	71	85	88	87	72
Of which budget < £500,000	153	172	228	189	205	195	177	156	130	102
Co-production	**30**	**38**	**39**	**47**	**47**	**60**	**42**	**40**	**29**	**18**
Of which majority and parity co-production	14	13	25	24	25	34	18	18	10	8
Of which minority co-production	16	25	14	23	22	26	24	22	19	10
Total	**297**	**338**	**374**	**364**	**374**	**368**	**360**	**347**	**309**	**265**

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 2017 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.

disclosure reasons, but as in previous years UK independent films accounted for the majority of productions during the year (Table 8).

Table 8 Numbers of UK studio-backed* and independent films, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
UK studio-backed films	13	16	14	13	17	17	16	21	c	c
UK independent films	268	297	352	332	350	343	338	321	289	244
Non-UK films	16	25	8	19	7	8	6	5	c	c
Total	**297**	**338**	**374**	**364**	**374**	**368**	**360**	**347**	**309**	**265**

Source: BFI

Notes:

Data updated since publication of the 2017 Statistical Yearbook.

c indicates data suppressed for disclosure reasons.

FILM PRODUCTIONS BY GENRE, 2015-2017

Table 9 and Figure 9 show a breakdown of production by genre for the years 2015-2017. The documentary and drama genres accounted for the highest proportion of films, at 25% and 15% respectively, but only 2% and 7% of total UK spend. These were followed by comedy and thriller which accounted for 11% and 10% respectively of productions, and 6% and 3% of respective UK spend. The biggest spending genre was action, which accounted for 37% of overall UK spend, but only 8% of films.

Table 9 Genre of film production in the UK, 2015-2017 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	72	7.8	3,847.0	43.1	1,946.0	36.9
Adventure	18	2.0	904.6	10.1	573.6	10.9
Fantasy	13	1.4	516.1	5.8	394.2	7.5
Drama	142	15.4	548.9	6.2	371.0	7.0
Comedy	104	11.3	445.7	5.0	326.4	6.2
Biopic	43	4.7	388.0	4.3	271.1	5.1
Family	11	1.2	356.6	4.0	232.8	4.4
Sci-fi	17	1.8	355.7	4.0	209.6	4.0
Animation	10	1.1	325.5	3.6	191.2	3.6
Music/dance	6	0.7	233.5	2.6	186.3	3.5
Romance	34	3.7	221.4	2.5	153.6	2.9
Thriller	94	10.2	298.2	3.3	144.0	2.7
Crime	36	3.9	235.5	2.6	123.2	2.3
Documentary	232	25.2	117.5	1.3	85.6	1.6
Horror	81	8.8	89.6	1.0	49.6	0.9
War	8	0.9	36.4	0.4	18.8	0.4
Total	**921**	**100.0**	**8,920.2**	**100.0**	**5,277.0**	**100.0**

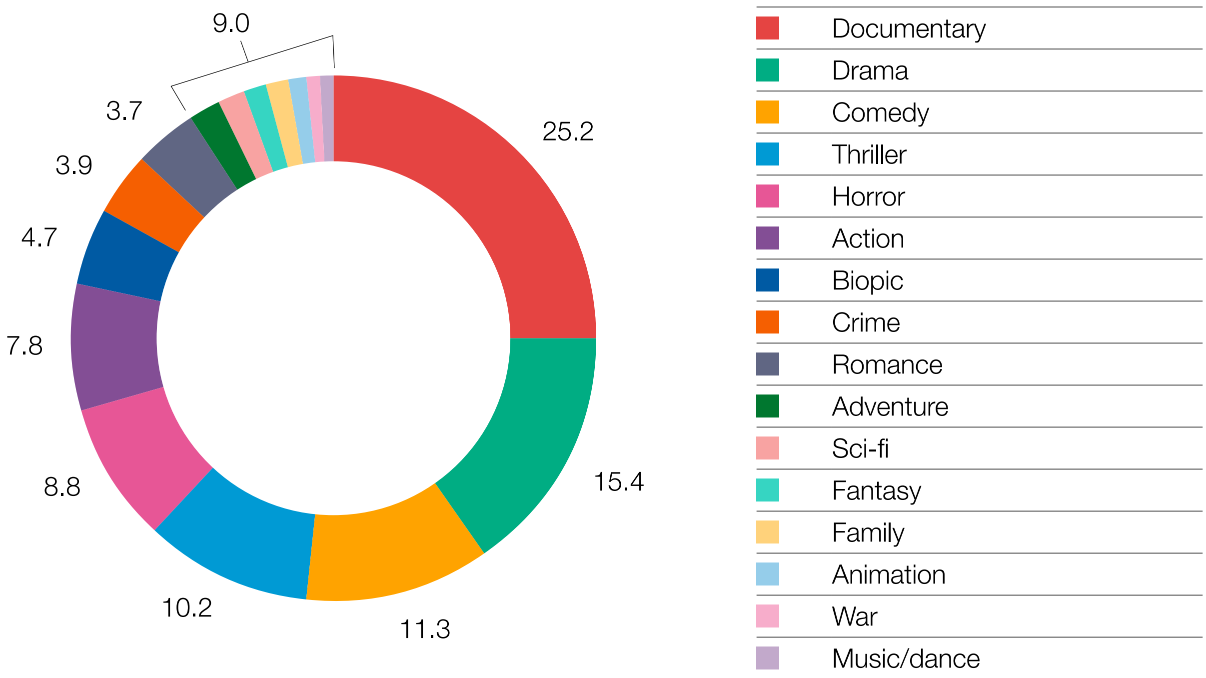
Source: BFI

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 9 Genre of UK film production 2015-2017 (% of films)



Source: BFI

Looking at the breakdown by genre of UK independent films alone over the three-year period (Table 10), the pattern was fairly similar. The main difference was that drama, comedy, biopic and thriller together accounted for a much greater proportion of total UK spend than for all films produced in the UK (54% compared with 21%) and action accounted for a lower proportion (17% compared with 37%).

Table 10 Independent UK productions by genre 2015-2017 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	140	16.4	462.9	17.7	312.3	19.0
Action	50	5.9	436.6	16.7	286.4	17.4
Comedy	100	11.7	330.6	12.7	237.9	14.5
Biopic	39	4.6	278.4	10.7	201.2	12.2
Thriller	91	10.7	221.8	8.5	134.5	8.2
Romance	32	3.7	130.8	5.0	80.9	4.9
Documentary	228	26.7	103.0	3.9	79.6	4.8
Animation	8	0.9	118.6	4.5	71.0	4.3
Family	7	0.8	77.7	3.0	67.9	4.1
Crime	34	4.0	128.5	4.9	55.1	3.3
Horror	79	9.3	47.1	1.8	34.0	2.1
Adventure	13	1.5	196.1	7.5	33.8	2.1
War	8	0.9	36.4	1.4	18.8	1.1
Music/dance	4	0.5	16.0	0.6	15.9	1.0
Sci-fi	12	1.4	16.0	0.6	8.2	0.5
Fantasy	9	1.1	7.8	0.3	7.7	0.5
Total	**854**	**100.0**	**2,608.2**	**100.0**	**1,645.1**	**100.0**

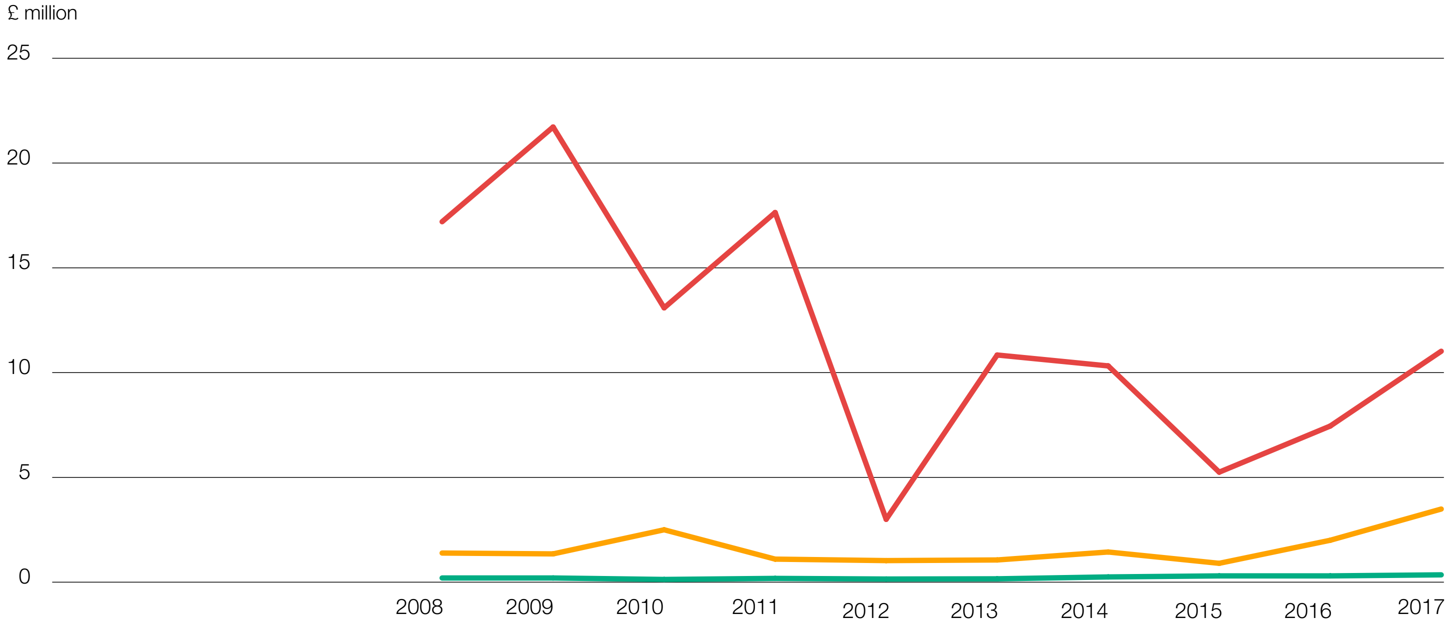
Source: BFI

See notes to Table 9.

BUDGET TRENDS

The median budget for domestic features in 2017 was £350,000, up from £300,000 in 2016 (Figure 10). It should be noted that the 2017 median is likely to be revised downwards, due to the delay in acquiring budget data for low and micro-budget productions. The median budget for inward investment features was £11 million, up from £7.5 million in 2016, while for co-productions the median budget increased from £2 million to an unusual high of £3.5 million.

Figure 10 Median feature film budgets, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Inward investment	17.20	21.72	13.09	17.64	3.00	10.84	10.32	5.25	7.45	11.02
Domestic UK	0.20	0.20	0.13	0.18	0.15	0.16	0.25	0.30	0.30	0.35
Co-production	1.39	1.35	2.50	1.10	1.03	1.06	1.44	0.90	2.00	3.49

Source: BFI

Notes:

Median budget is the middle value of budgets (ie 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.

Includes films with budgets of less than £500,000.

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

Data updated since publication of the 2017 Statistical Yearbook.

SIZE DISTRIBUTION OF BUDGETS

The budget size distribution for the three main categories of films made in 2017 is shown in Tables 11 to 13.

For inward investment features, the 27 films with budgets of £30 million or over (37% of all inward features) accounted for 90% of the total budget for this category (Table 11). There were 21 inward features with budgets of less than £5 million (29% of inward features), which accounted for 2% of the total budget for these films.

Table 11 Size distribution of budgets, inward investment features, 2017

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£30 million	27	2,995.6	90.1
£10 - £29.9 million	12	170.4	5.1
£5 - £9.9 million	13	103.4	3.1
£2 - £4.9 million	12	45.3	1.4
<£2 million	9	9.3	0.3
Total	**73**	**3,324.1**	**100.0**

Source: BFI

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

Almost 59% of domestic UK features (102) had budgets of under £500,000, and only 10 productions (6% of domestic UK projects) had budgets of £5 million or over (Table 12). The domestic UK films in the highest budget band accounted for 50% of this category's aggregate budget, while those in the lowest budget band accounted for 7%.

Table 12 Size distribution of budgets, domestic UK features, 2017

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	10	127.2	50.0
£2 - £4.9 million	20	64.3	25.3
£0.5 - £1.9 million	42	45.1	17.7
<£0.5 million	102	18.0	7.1
Total	**174**	**254.6**	**100.0**

Source: BFI

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

Six of the 18 co-productions produced in the UK in 2017 had budgets of £5 million or over, accounting for 72% of the total budget in this category (Table 13). The co-productions with budgets of under £500,000 accounted for 1.5% of the total budget.

Table 13 Size distribution of budgets, co-productions, 2017

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	6	54.5	72.2
£2 - £4.9 million		15.5	20.6
£0.5 - £1.9 million	12	4.3	5.7
<£0.5 million		1.1	1.5
Total	**18**	**75.4**	**100.0**

Source: BFI

Note: The number of co-productions with budgets under £5 million has been aggregated for disclosure reasons, due to the low numbers in the individual budget bands.

BIG BUDGET PRODUCTIONS, 2008-2017

The importance to UK spend of a small number of big budget productions – usually inward investment films – is demonstrated in Table 14. In 2017, the 29 films with budgets of £30 million or over accounted for 81% of UK production spend, the highest proportion of UK spend attributed to this budget category since our records began. All except two of these films were inward investment features.

Table 14 Big budget films' contribution to UK spend, 2008-2017

	Number of films with budgets ≥£30 million	Value of associated UK spend (£ million)	Total UK spend (£ million)	Big budget film % of UK spend
2008	13	410.8	723.3	56.8
2009	17	887.4	1,256.1	70.6
2010	12	822.0	1,154.3	71.2
2011	17	1,009.8	1,327.7	76.1
2012	10	634.3	1,009.6	62.8
2013	16	817.0	1,165.9	70.1
2014	20	1,157.1	1,573.0	73.6
2015	16	1,116.6	1,556.4	71.7
2016	25	1,331.5	1,718.2	77.5
2017	29	1,614.1	2,002.4	80.6

Source: BFI

Note: Data updated since publication of the 2017 Statistical Yearbook.

UK SPEND AS PERCENTAGE OF TOTAL PRODUCTION BUDGET

Table 15 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 2017, the UK spend of domestic films was 87% of total budget, for inward investment films it was 53% and for co-productions it was 42%.

Table 15 UK spend as percentage of total production budget, 2008-2017

	Inward investment	Domestic UK	Co-production
2008	46.9	77.1	43.5
2009	53.0	81.5	37.2
2010	71.9	89.9	42.1
2011	55.9	86.7	36.0
2012	64.0	88.7	46.0
2013	68.8	85.6	45.0
2014	57.2	78.7	34.0
2015	60.8	89.7	40.2
2016	59.3	81.1	37.1
2017	52.6	86.9	41.6

Source: BFI

Note: Data updated since publication of the 2017 Statistical Yearbook.

Figure 11 underlines that a small proportion (11%) of titles with a UK spend of £30 million or over are responsible for the majority (81%) of UK production spend. Conversely, the 41% of films with a UK spend of less than £500,000 represent less than 1% of production investment in the UK.

Figure 11 Percentage of productions and UK spend by category of UK spend, 2017

Source: BFI

DOMESTIC UK PRODUCTIONS BY TERRITORY OF SHOOT

Table 16 shows that the majority of domestic UK productions beginning principal photography in 2017 (130 out of 174) were shot exclusively in the UK, while 44 were shot partly or wholly outside the country. The non-UK spend of domestic productions in 2017 as a proportion of their total budget was 13%.

Table 16 Domestic UK productions by territory of shoot, 2017

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	130	186.5	5.1	2.7
UK and other/wholly outside the UK	44	68.1	28.2	41.4
Total domestic UK films	**174**	**254.6**	**33.3**	**13.1**

Source: BFI

Table 17 shows the number of shoots by territory for domestic UK films in 2017. Because some films were shot in two or more territories, the total number of shoots is greater than the total number of films. There were 15 shoots in the USA, five in France and three in Spain.

Table 17 Domestic UK productions, shoots by territory or region, 2017

Territory of shoot	Number of shoots
UK	162
USA	15
France	5
Spain	3
Bulgaria	2
Canada	2
India	2
Italy	2
Jamaica	2
Morocco	2
South Africa	2
Other Europe	6
Other	10
Total	**215**

Source: BFI

CO-PRODUCTIONS BY TERRITORY OF SHOOT

In contrast to domestic UK films, co-productions beginning principal photography in 2017 were usually shot partly or wholly abroad; only three out of 18 films were shot wholly in the UK (Table 18).

Table 18 Co-productions by territory of shoot, 2017

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	3	12.8	2.1	16.2
UK and other	11	45.3	28.9	63.8
Wholly outside the UK	4	17.3	13.1	75.4
Total co-productions	**18**	**75.4**	**44.0**	**58.4**

Source: BFI
Notes:
Includes both official and unofficial co-productions.
Figures/percentages may not sum to totals due to rounding.

The country distribution of co-production shoots is shown in Table 19. As most co-productions were shot in two or more territories, the total number of shoots was greater than the total number of films. There were five shoots in Germany and three in the Republic of Ireland.

Table 19 Co-productions, shoots by territory or region, 2017

Territory of shoot	Number of shoots
UK	14
Germany	5
Republic of Ireland	3
Other Europe	7
Other	4
Total	**33**

Source: BFI

PRODUCTION COMPANY ACTIVITY LEVELS

UK film production in 2017 was dispersed among a large number of production companies, as shown in Table 20. The BFI Research and Statistics Unit recorded 421 production companies associated with films shot in the UK or co-productions involving the UK in the year, an increase from 353 in 2016. Of these, 378 (90%) were associated with a single feature. Companies were a mixture of distinct production entities and special purpose vehicles set up to make a single film.

Table 20 Film production company activity, 2017

Number of features per company	Number of companies
4	3
3	11
2	29
1	378
Total	**421**

Source: BFI RSU
Note: Includes all production categories.

THE VALUE AND VOLUME OF HIGH-END TELEVISION PRODUCTION

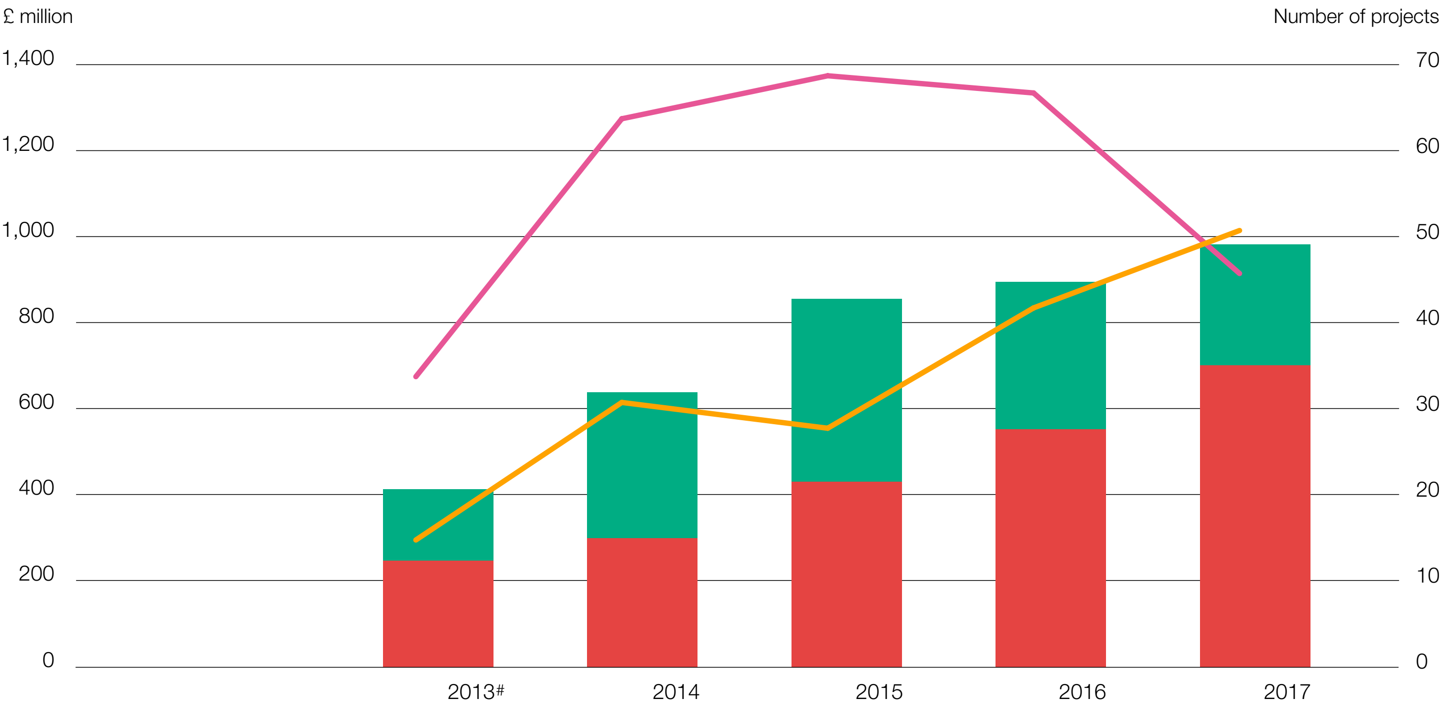
Figure 12 shows the number of UK qualifying HETV programmes produced between 2013 and 2017 and their associated UK spend. (It should be noted that, as the tax relief for HETV production came into force on 1 April 2013, the data for that year represents production activity for only part of the year.)

The UK production value associated with UK qualifying HETV programmes has been on an upward trend since the introduction of the tax relief. UK production spend was £985 million in 2017, up 9% compared with 2016 and an increase of 54% on 2014 (the first full year of data). For all years except 2014, co-productions and inward investment projects have contributed the majority of UK production spend. In 2017, this category represented 71% of the total UK spend but this was entirely due to inward investments as no qualifying co-productions started production in the year.

For the majority of the period, the total number of qualifying HETV projects produced in the UK increased year on year, peaking at 109 in 2016. Of the 97 projects produced in 2017, 51 were inward investment projects and 46 were domestic UK projects. This was the first year that the number of non-domestic productions was greater than the number of domestic projects but, as with feature films, the figures for recent years are likely to be revised as more detailed information on production activity becomes available.

Domestic HETV productions shooting in the UK in 2017 included *Derry Girls* (7 episodes), *A Discovery of Witches* (8 episodes) and *The Woman in White* (5 episodes). Inward investment productions included *The Dark Crystal: Age of Resistance* (10 episodes), *Howards End* (4 episodes) and *Philip K Dick's Electric Dreams* (10 episodes).

Figure 12 UK spend and number of UK qualifying HETV productions*, 2013-2017



	2013#	2014	2015	2016	2017
UK spend of co-production & inward investment projects	247.9	300.2	431.6	554.2	702.9
UK spend of domestic UK projects	167.1	339.9	426.5	342.6	281.6
Total UK spend	**414.9**	**640.0**	**858.1**	**896.7**	**984.6**
Number of co-production & inward investment projects	15	31	28	42	51
Number of domestic UK projects	34	64	69	67	46
Total number of projects	**49**	**95**	**97**	**109**	**97**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced.

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

Data updated since publication of the 2017 Statistical Yearbook.

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

The data for 2013 cover the period April – December.

GENRE OF HIGH-END TELEVISION PRODUCTIONS

Table 21 shows a breakdown of 2017 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 40 productions (41% of the total) and a UK spend of £316 million (32% of the total), followed by thriller which accounted for 16 productions and 13% of total UK spend. Adventure, which accounted for only three productions, had the second highest share of UK spend at 22%.

Table 21 Genre of UK qualifying HETV productions*, 2017 (ranked by UK spend)

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	40	41.2	446.2	32.9	315.9	32.1
Adventure	3	3.1	303.2	22.3	213.2	21.7
Thriller	16	16.5	151.0	11.1	124.5	12.6
Crime	8	8.2	74.7	5.5	71.0	7.2
Comedy	13	13.4	76.0	5.6	67.5	6.9
Sci-fi	7	7.2	102.9	7.6	57.5	5.8
Biopic	4	4.1	98.5	7.3	52.7	5.4
Action	2	2.1	42.0	3.1	34.7	3.5
Fantasy	1	1.0	22.7	1.7	21.8	2.2
Romance	2	2.1	28.3	2.1	21.3	2.2
Documentary	1	1.0	11.8	0.9	4.4	0.4
Total	**97**	**100.0**	**1,357.3**	**100.0**	**984.6**	**100.0**

Source: BFI

Notes:

The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.

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

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

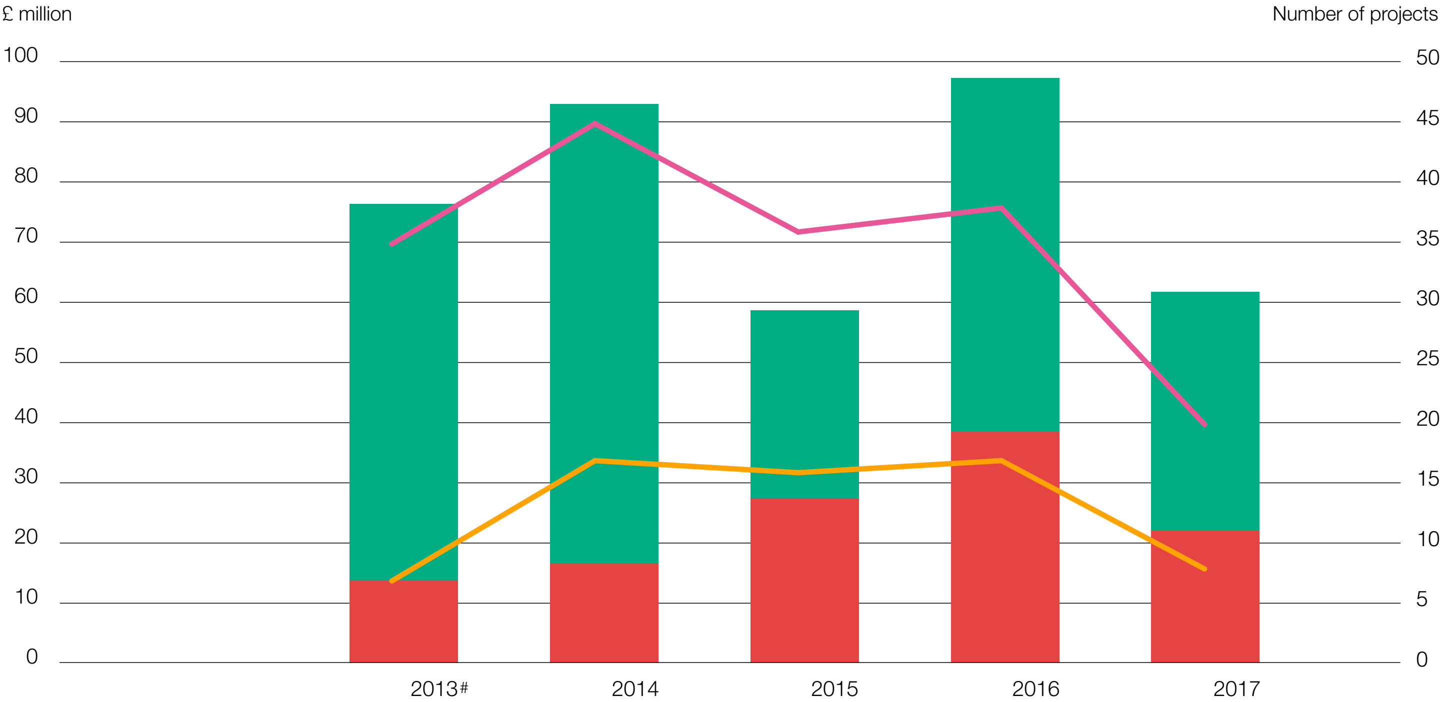
THE VALUE AND VOLUME OF ANIMATION TELEVISION PRODUCTION

Figure 13 shows the number of UK qualifying animation television programmes produced between 2013 and 2017 and their associated UK spend. (As the tax relief for this type of production came into force on 1 April 2013, the data for that year represents production activity for only part of the year.)

In 2017, the total UK production spend for UK qualifying animation programmes was £62 million, down from a high of £97 million in 2016. Unlike feature film and HETV programmes, domestic projects have accounted for the majority of the UK production value for animations throughout the period. In 2017, the production spend associated with domestic UK animation projects was £40 million (64% of the total), the second lowest value of the period. However, these figures are likely to be revised upwards as more detailed information becomes available.

A total of 28 UK qualifying animation projects commenced principal photography in 2017, down from 55 in 2016 and the lowest figure of the five-year period. There were 20 domestic UK projects and eight co-production and inward investment projects. Titles going into production in the year included *Floogals* – Series 2 (52 episodes), *Horatio: Genius for Hire* (26 episodes) and *Peppa Pig* – Series 5 (165 episodes).

Figure 13 UK spend and number of UK qualifying animation television productions*, 2013-2017



	2013#	2014	2015	2016	2017
UK spend of co-production & inward investment projects	13.6	16.5	27.2	38.3	22.0
UK spend of domestic UK projects	62.6	76.3	31.3	58.8	39.6
Total UK spend	**76.2**	**92.8**	**58.5**	**97.1**	**61.6**
Number of co-production & inward investment projects	7	17	16	17	8
Number of domestic UK projects	35	45	36	38	20
Total number of projects	**42**	**62**	**52**	**55**	**28**

Source: BFI

Notes:

Productions are allocated to the year principal photography commenced.

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

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

\# The data for 2013 cover the period April – December.

THE VALUE AND VOLUME OF CHILDREN'S TELEVISION PRODUCTION

Table 22 shows the UK spend associated with the production of UK qualifying children's television projects between 2015 and 2017. (As the tax relief for children's television programmes came into force on 1 April 2015, the data for that year represents production activity for only part of the year.)

In 2017, the UK production spend of qualifying children's television projects was £55 million, down from £61 million in 2016. Domestic UK productions accounted for the majority of UK spend across the period.

Table 22 UK spend of UK qualifying children's television productions*, 2015-2017 (£ million)

	2015#	2016	2017
Co-production & inward investment	7.5	21.2	19.5
Domestic UK	31.6	39.8	35.8
Total	**39.1**	**61.0**	**55.3**

Source: BFI

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.

Data updated since publication of the 2017 Statistical Yearbook.

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

The data for 2015 cover the period April – December.

A total of 46 UK qualifying children's television projects went into production in 2017, the majority of which were domestic UK productions (Table 23). While the table suggests a decline in the volume of projects since 2015, it should be borne in mind that the most recent figures are likely to be revised upwards. Titles going into production in 2017 included *Top Class* – Series 3 (17 episodes), *Waffle the Wonder Dog* (30 episodes) and *The Worst Witch* – Series 2 (13 episodes).

Table 23 Number of UK qualifying children's television programmes, 2015-2017

	2015	2016	2017
Co-production & inward investment	6	10	6
Domestic UK	52	51	40
Total	**58**	**61**	**46**

Source: BFI

See notes to Table 22.

THE VALUE AND VOLUME OF VIDEO GAMES DEVELOPMENT

Table 24 shows the UK spend associated with the development of UK qualifying video game projects between 2014 and 2017. (As the tax relief for video games came into force on 1 April 2014, the data for that year represents development activity for only part of the year.)

In 2017, the UK spend of qualifying video games was £132 million, a decrease from £390 million in 2016 and the lowest figure of the period. However, as with the other production categories, as more data becomes available the figures for the last few years are likely to be revised upwards. The breakdown between domestic UK and inward investment games in 2017 is not shown due to the low number of inward investment projects but, as in the other years in the period, domestic UK developments accounted for the largest share of UK production value.

Table 24 UK spend of UK qualifying video games, 2014-2017 (£ million)

	2014#	2015	2016	2017
Inward investment	89.9	54.7	84.3	c
Domestic UK	147.4	174.1	305.6	c
Total	**237.3**	**228.8**	**389.9**	**132.3**

Source: BFI

Notes:

Projects are allocated to the year development commenced.

Data updated since publication of the 2017 Statistical Yearbook.

The data for 2014 covers the period April – December.

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

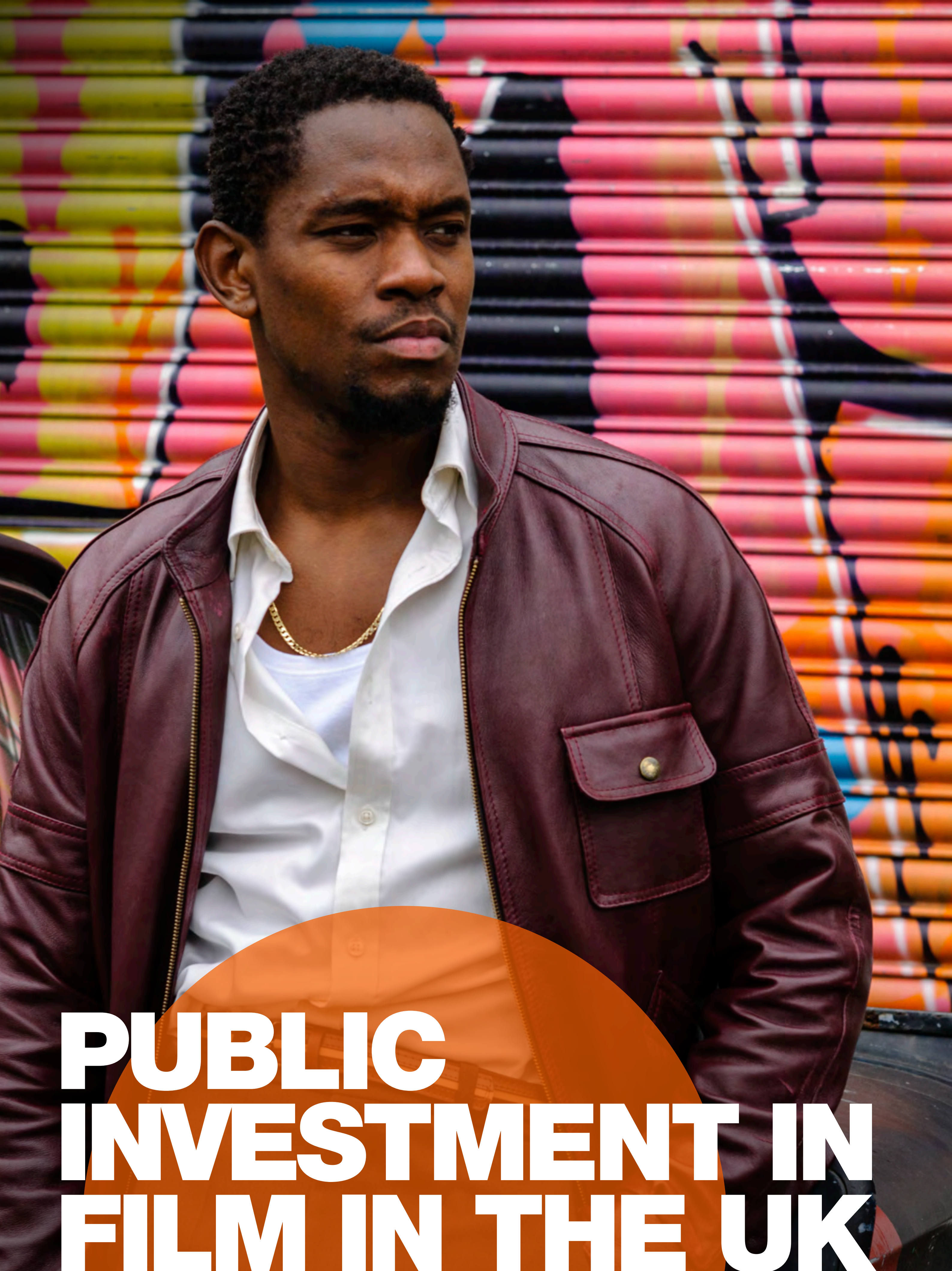
As Table 25 shows, the number of video game developments decreased substantially in 2017, falling from a high of 228 in 2016 to 41. However, there is a significant lag in the collection of data related to this category, so the number of developments for 2017 is likely to be revised upwards. Again, the breakdown between inward investment and domestic UK projects in 2017 is not shown due to the low number of inward investments but, as in previous years, domestic UK video games accounted for the majority of developments.

Table 25 Number of UK qualifying video games, 2014-2017

	2014	2015	2016	2017
Inward investment	11	8	13	c
Domestic UK	198	206	215	c
Total	**209**	**214**	**228**	**41**

Source: BFI

See notes to Table 24.



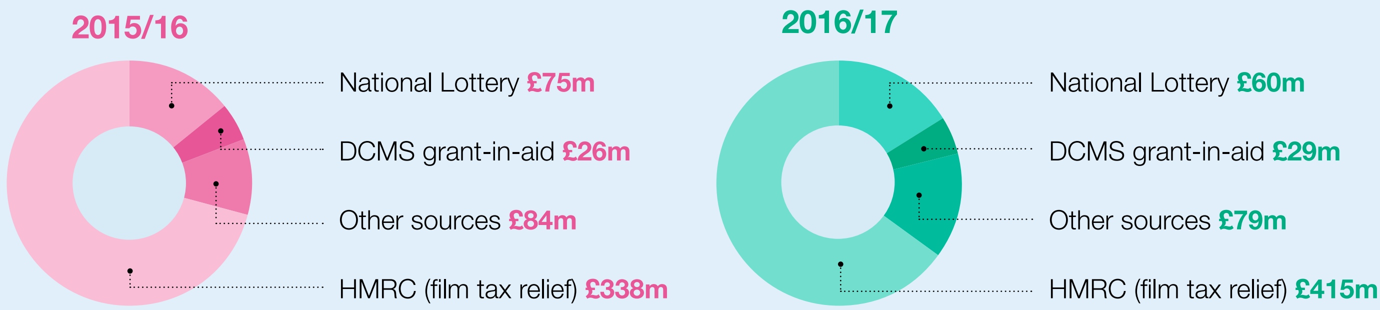
PUBLIC INVESTMENT IN FILM IN THE UK

Image: *Yardie* courtesy of StudioCanal

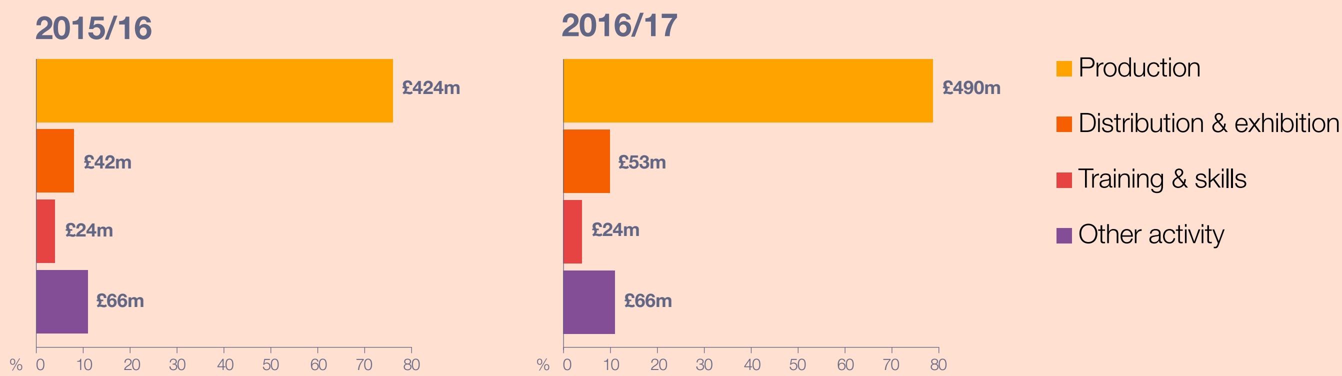
FACTS IN FOCUS

PUBLIC FUNDING FOR FILM IN THE UK

Total estimated public funding available for film in the UK in **2016/17** was **£583 million**, an increase of **11%** from **£523 million** in **2015/16**.



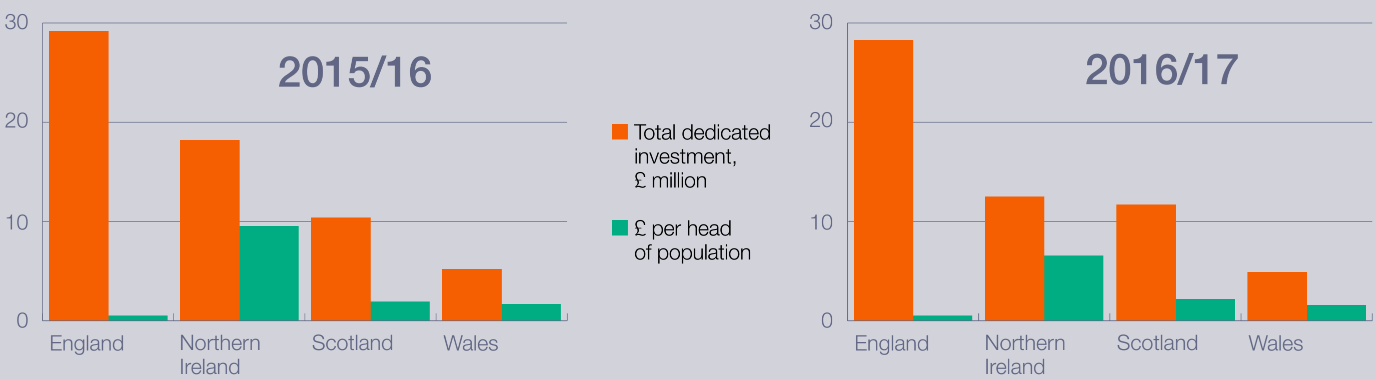
ACTIVITIES SUPPORTED BY PUBLIC FUNDING FOR FILM IN THE UK



In 2016/17, 85% of investment in film production came from the film production tax relief, up from 80% in 2015/16.

SPEND ACROSS THE NATIONS

For both 2015/16 and 2016/17, in cash terms funding dedicated solely to film activity in the individual nations of the UK was greatest in England but per capita investment was highest in Northern Ireland.



PUBLIC INVESTMENT IN FILM IN THE UK

PUBLIC FUNDING FOR FILM IN THE UK BY SOURCE[1]

Table 1 outlines the estimated levels of available public funding for film in the UK from 2014/15 to 2016/17. (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 2016/17 is estimated to have been £582 million, up from £523 million in 2015/16. The largest single source of public funding in the year was the UK film tax relief, which provided £415 million (71% of the total). This was followed by the National Lottery (£60 million; 10% of the total) and grant-in-aid of £29 million (5% of the total) from the Department for Digital, Culture, Media and Sport (DCMS) to the BFI and the National Film and Television School (NFTS). The year saw a small increase in DCMS grant-in-aid funding compared with 2015/16 but, in accord with a broader decrease in UK government grant-in-aid investment, funding remained lower than in 2014/15.

Publicly owned national broadcasters and their film arms also made substantial investments: Film4/Channel 4 provided funding of £26 million for UK film in 2016/17, while BBC Films/BBC provided funding of £10 million.

Investment from Arts Council England (ACE) rose to £13 million in 2016/17 (up from £4.7 million in the previous financial year) due mainly to an increase in successful moving image project applications to the Grants for the Arts scheme and other broad-based ACE funds.

The European Union (EU) provided investment of £4.5 million for UK film activity, of which £4 million came from Creative Europe's MEDIA sub-programme in 2016 (see note to Table 1) and £0.5 million was via the structural funds in 2016/17. Investment from these funds, which include the European Regional Development Fund and European Social Fund, was down from £7.6 million in 2015/16. This reflects a general decline in investment from EU structural funds across the UK's screen sectors.

[1] Public funding source refers to the amount of investment available in a given financial year, whereas spend by agency (Table 2) shows the actual amount of money spent by agencies in a given year. Investment via HMRC through the film production tax relief is automatic, hence data for HMRC in Tables 1 and 2 are the same.

Table 1 Public funding for film in the UK by source, 2014/15 – 2016/17 (ranked by 2016/17 spend)

	2014/15		2015/16		2016/17	
	£ million	%	£ million	%	£ million	%
National Lottery Distribution Fund[1]	62.8	15.2	75.4	14.4	59.6	10.3
DCMS grant-in-aid to the BFI and NFTS	33.0	8.0	26.4	5.0	28.5	4.9
Film4/Channel 4[2]	15.2	3.7	26.1	5.0	25.7	4.4
Arts Council England (ACE)[3]	6.8	1.6	4.7	0.8	13.1	2.2
Northern Ireland Executive	2.4	0.6	13.0	2.5	11.4	2.0
BBC Films/BBC[4]	10.4	2.5	10.5	2.0	10.4	1.8
European Union (EU) MEDIA sub-programme[5]	3.8	0.9	3.8	0.7	4.0	0.7
Scottish Government	2.1	0.5	5.1	1.0	3.9	0.7
Welsh Assembly Government	3.6	0.9	3.1	0.6	3.2	0.5
Higher education funding[6]	1.2	0.3	1.8	0.3	2.7	0.5
Local government[7]	0.2	<0.1	0.2	<0.1	2.1	0.4
Foreign and Commonwealth Office	1.1	0.3	1.5	0.3	1.3	0.2
Other EU[8]	4.9	1.2	7.6	1.4	0.5	0.1
Department for International Trade	0.3	0.1	0.4	0.1	0.2	<0.1
National/regional development agencies	12.7	3.1	1.7	0.3	0.1	<0.1
Department for Business, Energy and Industrial Strategy	0.1	<0.1	3.3	0.6	>0.1	<0.1
Other public sector[9]	<0.1	<0.1	0.1	<0.1	>0.1	<0.1
Nesta	-	-	0.1	<0.1	-	-
Total public sector selective investment[10]	**162.5**	**39.3**	**184.7**	**35.3**	**166.7**	**28.7**
UK film production tax relief	251.3	60.7	338.4	64.7	414.9	71.3
Total public sector selective and automatic	**413.8**	**100.0**	**523.1**	**100.0**	**581.6**	**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 Film 4's production investment and Channel 4 investment in the NFTS.

[3] Includes ACE National Lottery investments (eg 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 2014-2016 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: 2014 €1= £0.85; 2015 €1= £0.85; 2016 €1= £0.88.

[6] This comprises higher education establishment-derived support for film archives and the NFTS. Figures do 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, Screen South and Northern Film + Media.

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

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

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

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

Data for 2015/16 updated since publication of the 2017 Statistical Yearbook.

SPEND BY AGENCY

As in previous years, HMRC was the largest net spender on film in 2016/17 (£415 million for film tax relief), followed by the BFI (£87 million), Film4/Channel 4 (£25 million) and the NFTS (£15 million), although, as in 2015/16, NFTS spending was boosted by the School's ongoing capital redevelopment investment.

Table 2 Net film spend by agency, 2016/17[1]

	£ million	%
HMRC	414.9	65.6
BFI	86.7	13.7
Film 4/Channel 4	25.0	4.0
NFTS	15.2	2.4
Arts Council England[2]	13.1	2.1
Northern Ireland Screen	12.5	2.0
Scottish agencies[3]	11.7	1.8
BBC Films/BBC	10.0	1.6
EU MEDIA sub-programme[4]	8.8	1.4
Into Film	7.9	1.3
Creative England	5.8	0.9
Film London	5.5	0.9
Creative Skillset	5.2	0.8
Welsh agencies[5]	4.9	0.8
English regional film archives[6]	2.0	0.3
Screen Yorkshire, Screen South and Northern Film + Media	1.8	0.3
British Council	1.3	0.2
Heritage Lottery Fund	0.3	0.1
Total public agencies[7]	**632.8**	**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 ACE National Lottery investments (eg 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.

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

[4] Includes £5.1 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 East Film Archive, North West Film Archive, Screen Archive South East, South West Film and Television Archive and Yorkshire Film Archive.

[7] The spending tabulated above includes net transfers to and from reserves and spending financed by commercial income (eg from film rights) earned by agencies. For these reasons the total spending by agencies (£632.8 million) is higher than total public funding for film in the 2016/17 year (£581.6 million, Table 1).

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

ACTIVITIES SUPPORTED BY PUBLIC SPENDING ON FILM

Table 3 describes the areas of activity supported by public spend on film in the UK between 2014/15 and 2016/17. 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 2016/17, film production accounted for £490 million (77% of the total). In the same financial year, distribution and exhibition benefited from the second largest share of public spending at 8% (£53 million) while training and skills activity received 4% of total public spend.

In all areas, public spending increased between 2014/15 and 2016/17 with the exception of administration and services to the public, export and inward investment promotion, and education, young people and lifelong learning. (In the latter case, the high spend for 2014/15 is largely the result of the implementation of the BFI's *Film Forever* strategic plan, one of the goals of which was the expansion of opportunities for film education and learning.)

Table 3 Activities supported by public spend on film, 2014/15 – 2016/17 (ranked by 2016/17 spend)

	2014/15		2015/16		2016/17	
	£ million	%	£ million	%	£ million	%
Production[1]	316.6	68.0	424.2	76.1	489.8	77.4
Distribution and exhibition	18.6	4.0	42.2	7.6	53.3	8.4
Training and skills[2]	17.7	3.8	24.3	4.4	24.0	3.8
Film archives and heritage[3]	18.5	4.0	20.7	3.7	19.5	3.1
Administration and services to the public	24.4	5.2	8.1	1.5	11.6	1.8
Export and inward investment promotion[4]	13.1	2.8	9.4	1.7	10.6	1.7
Education, young people and lifelong learning	46.4	10.0	14.0	2.5	9.7	1.5
Development	7.4	1.6	8.3	1.5	9.4	1.5
Business support[5]	2.7	0.6	5.9	1.1	4.9	0.8
Total[6]	**465.4**	**100.0**	**557.1**	**100.0**	**632.8**	**100.0**

Source: Creative Cultural Associates, Bigger Picture Research

[1] Non-tax break production spend in 2016/17 was £74.9 million.

[2] Skills Investment Fund, national/regional screen agency training investment.

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

[4] British Film Commission; British Council, locations services in the nations and regions and ACE awards to international projects.

[5] National/regional screen agency investment: primary beneficiaries are independent production companies.

[6] 2016/17 total expenditure (£632.8 million) was greater than total public funding (£581.6 million, Table 1) as expenditure was supplemented by earned/self-generated income, commercial sponsorship, grants from trusts and foundations and transfers from reserves.

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 (eg investment from Ffilm Cymru Wales, Creative Scotland and Northern Ireland Screen). Table 4 shows the level of investment dedicated to each of the UK nations in 2016/17. In cash terms, England received the greatest level of funding with £28 million. In per capita terms, however, the level of investment in Northern Ireland was the highest at £6.58 per person, almost three times the level in Scotland, which had the next highest spend per person at £2.17.

Table 4 Investment in film in the UK nations 2016/17 (ranked by total dedicated investment)

	Total dedicated investment £ million	Population (million)	£ per person
England[1]	28.3	55.6	0.51
Northern Ireland[2]	12.5	1.9	6.58
Scotland[3]	11.7	5.4	2.17
Wales[4]	4.9	3.1	1.58

Source: Creative Cultural Associates, ONS

Notes:

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

[2] Includes investment from Northern Ireland Screen and Arts Council of Northern Ireland.

[3] Includes investment from Creative Scotland and the National Library of Scotland Moving Image Archive.

[4] Includes investment from Ffilm Cymru Wales, Wales Film Archive, Arts Council of Wales and Welsh Assembly Government direct expenditure.

CREATIVE EUROPE INVESTMENT IN THE UK

Creative Europe is the European Union's support programme for the cultural and audiovisual sectors. It was launched in January 2014 with a budget of €1.5 billion (approximately £1.3 billion) for the period 2014-2020, and follows on from the previous Culture and MEDIA programmes.

Creative Europe's MEDIA sub-programme supports European film and other audiovisual industries by funding the development, promotion and distribution of European works. In 2016, the MEDIA sub-programme invested £4 million in UK-based film activity; over one third of this (38%) supported film distribution schemes (Table 5).

Table 5 Creative Europe MEDIA sub-programme investment in film in the UK, 2016

Activity area	MEDIA scheme(s)	£ million	%
Distribution	Selective, automatic, sales agents and online	1.5	37.8
Development	Single project and slate	1.2	30.6
Exhibition	Europa Cinemas, film festivals	0.4	10.4
Training and skills	Training	0.4	9.4
Business support	Markets	0.3	6.7
Education	Film education	0.2	5.1
Total		**4.0**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis

Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.88.

In addition to this, £5.1 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 (including video games). UK television production benefited from £1.3 million in 2016, and £0.1 million was invested in new media (Table 6).

Table 6 Creative Europe MEDIA sub-programme investment in television and new media in the UK, 2016

Activity area	MEDIA scheme(s)	£ million	%
TV production	TV programming	1.3	96.0
Development: new media	Video games	0.1	4.0
Total		**1.4**	**100.0**

Source: Creative Europe Desk UK, Creative Cultural Associates analysis

Note: Data provided in Euros and converted to British pounds. Exchange rate: €1 = £0.88.

BFI LOTTERY AWARDS 2017

Table 7 shows the Lottery awards made by the BFI in 2017. There were 351 awards in total (up from 199 in 2016) with a combined value of £34 million.

Table 7 BFI Lottery awards, 2017 (ranked by total value)

Source	Number of awards	Total value (£ million)
Film Fund - Production	46	16.9
Film Fund - Audiences	155	9.3
Film Fund - Talent development	25	2.5
Film Fund - International	35	1.8
Film Fund - Development	88	1.7
Film Fund - Funded partner	2	1.4
Total awards	**351**	**33.6**

Source: BFI

Note: BFI awards data are for calendar year 2017.

Large awards for film of £250,000 or over made by the BFI in 2017 are shown in Table 8. In total, 16 such awards were made, eight of which were for £1 million or more.

Table 8 Large awards (£250,000+) for film made by the BFI, 2017

Project	Amount of award (£)
Untitled Chris Morris Project	1,555,582
Wild Rose	1,400,000
The Boy Who Harnessed the Wind	1,255,000
Out of Blue	1,220,000
Been So Long	1,072,098
The Souvenir	1,055,000
Yardie	1,035,000
Tell It to the Bees	1,009,500
In Fabric	805,000
Colette	750,000
Undergods	742,000
Gwen	730,791
Beats	685,000
Dirty God	547,500
High Life	350,000
Under the Wire	282,759

Source: BFI

Note: BFI awards data are for calendar year 2017.

LEADING PUBLIC INVESTORS IN BRITISH FILM PRODUCTION, 2015-2017

Table 9 shows the leading public agency and public service broadcaster investment in British films for the calendar years 2015-2017. The public investors involved with the greatest number of films were BBC Films/BBC with 78 projects and the BFI with 71. These projects had estimated combined budgets of £231 million and £250 million respectively. (The 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, 2015-2017

Public funder	Number	Estimated budget (£ million)	Selected titles
BBC Films/BBC	78	231	David Brent: Life on the Road; My Scientology Movie; Stan & Ollie
BFI	71	250	Colette; Early Man; Viceroy's House
European agencies[1]	38	164	Baghdad in My Shadow; The Danish Girl; The Hermit
Creative Scotland	34	58	The Eyes of Orson Welles; Hush; Una
Film4/Channel 4	33	212	Cold War; Dark River; You Were Never Really Here
Creative England	25	28	God's Own Country; The Levelling; Two for Joy
Welsh agencies/S4C/ Welsh Assembly Government	20	64	I Am Not a Witch; Invasion Earth; Ethel & Ernest
Northern Ireland Screen	18	31	The Bookshop; The Devil's Doorway; A Good Woman Is Hard to Find
English regional screen agencies	17	34	Ghost Stories; How to Talk to Girls at Parties; The Visitor
Irish Film Board/Broadcasting Authority of Ireland	17	37	Mary Shelley; Moon Dogs; Vita and Virginia
Creative Europe	10	23	City of Tiny Lights; One Girl; This Beautiful Fantastic

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.

[1] Examples of European film funding agencies include Deutscher Filmförderfonds, Le Centre national du cinéma et de l'image animée and Norsk filminstitutt.

FILM EDUCATION AND INDUSTRY EMPLOYMENT

Image: *Their Finest* courtesy of Lionsgate Films

FACTS IN FOCUS

LEARNING ABOUT AND THROUGH FILM

In 2017/2018, almost **250,000** children and young people across the UK learned about film through the film club initiative supported by **Into Film**

Over **890** talented 16-19 year olds gained filmmaking experience through the **BFI Film Academy programme**

SECONDARY EDUCATION

In 2017 / 2018:

- **45,900** students were entered for GCSE media/film/TV/moving image arts, down **6%** from **49,000** in 2016/17
- **1,990** students were entered for Scottish Intermediate media studies, **up 10%** from **1,810** in 2016/17
- **25,700** students were entered for GCE A Level media/film/TV/moving image arts, down **6%** from **27,300** in 2016/17
- **1,060** students were entered for Scottish Higher media studies, up **5%** from **1,010** in 2016/17

HIGHER EDUCATION

Entries for higher education film and media related courses

2016 / 2017
22,700
entries

2015 / 2016
22,800
entries

FILM INDUSTRY WORKFORCE

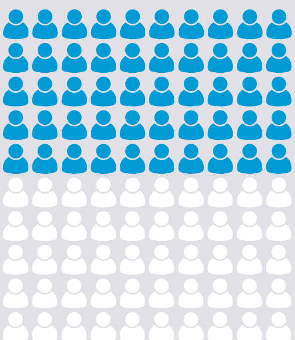
In 2017, around **88,000** people worked in the UK film industry

64,000 in film and video production

17,000 in film exhibition

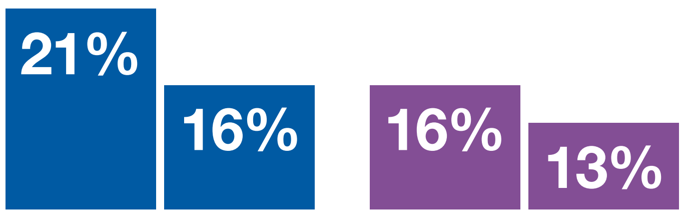
7,000 in film and video distribution

SELF-EMPLOYMENT IN THE PRODUCTION SECTOR



In 2017, **50%** of those engaged in film and video production were self-employed compared with 18% of the total UK workforce.

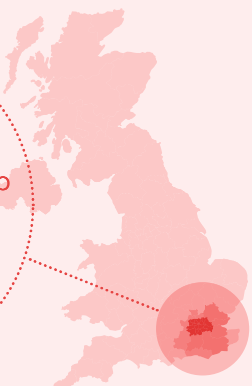
GENDER PROFILE OF WRITERS AND DIRECTORS OF UK FILMS



Women screenwriters of UK films released in the UK and Republic of Ireland

Women directors of UK films released in the UK and Republic of Ireland

WORKPLACE LOCATION



In 2017, **64%** of the UK film and video production workforce was based in **London and the South East**

WORKPLACE SCALE

Workplaces with 1-10 employees

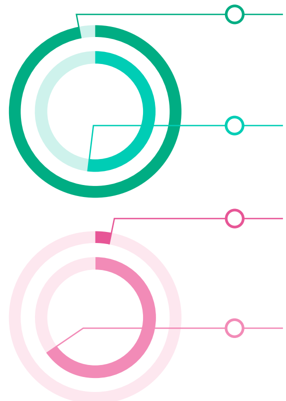
97% of all workplaces in the **film and video production** sector

52% of its total workforce

Workplaces with 50+ employees

3% of all workplaces in the **film and video distribution** sector

65% of its total workforce



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.

Over the past few years, the BFI has worked 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 based on 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 resources to support the current curriculum and providing resources for watching, making and learning about film within its network of schools' film clubs. (Film clubs supported by Into Film also operate in non-school settings such as youth clubs, cinemas and libraries.)

In 2017/18, almost 250,000 children and young people across the UK participated in Into Film's film club initiative and over 4,800 teaching professionals and youth leaders received training to work with film across the curriculum (including film studies). It is estimated that just over 65,400 sets of educational resources were downloaded in 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.

The total number of film clubs registered with Into Film increased by 15% between 2016/17 and 2017/18, rising from 18,276 to 21,110 (Table 1). The most recent survey of the Into Film programme (conducted in April 2018) found that just under 44% of the clubs registered at that time were active. (An active club is one that is providing some kind of film-based activity on a regular basis.)

Table 1 National/regional distribution of registered film clubs[1], 2016/17 and 2017/18 (ranked by number of clubs registered in 2017/18)

	2016/17		2017/18	
Nation/region	Number of film clubs	% of film clubs	Number of film clubs	% of film clubs
England	14,716	80.5	17,108	81.0
North West	2,174	11.9	2,525	12.0
London	2,095	11.5	2,483	11.8
South East	2,027	11.1	2,409	11.4
West Midlands	1,553	8.5	1,860	8.8
East of England	1,553	8.5	1,783	8.4
South West	1,506	8.2	1,766	8.4
Yorkshire and The Humber	1,485	8.1	1,679	8.0
East Midlands	1,483	8.1	1,660	7.9
North East	840	4.6	943	4.5
Scotland	1,511	8.3	1,820	8.6
Wales	1,025	5.6	1,149	5.4
Northern Ireland	890	4.9	1,033	4.9
No nation/region stated	134	0.7	-	-
England	**18,276**	**100.0**	**21,110**	**100.0**

Source: Into Film
Notes:
Percentages may not sum to 100 due to rounding.
[1] Film clubs registered with Into Film, including both active and inactive clubs.

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.

Table 2 shows the numbers of children and young people who have participated in the Into Film Festival since it launched. In 2017, almost 411,500 children and young people (and more than 55,400 education professionals) attended the festival, a rise of 67% compared with 2013.

Table 2 Attendances at National Schools Film Week and the Into Film Festival, 2013-2017

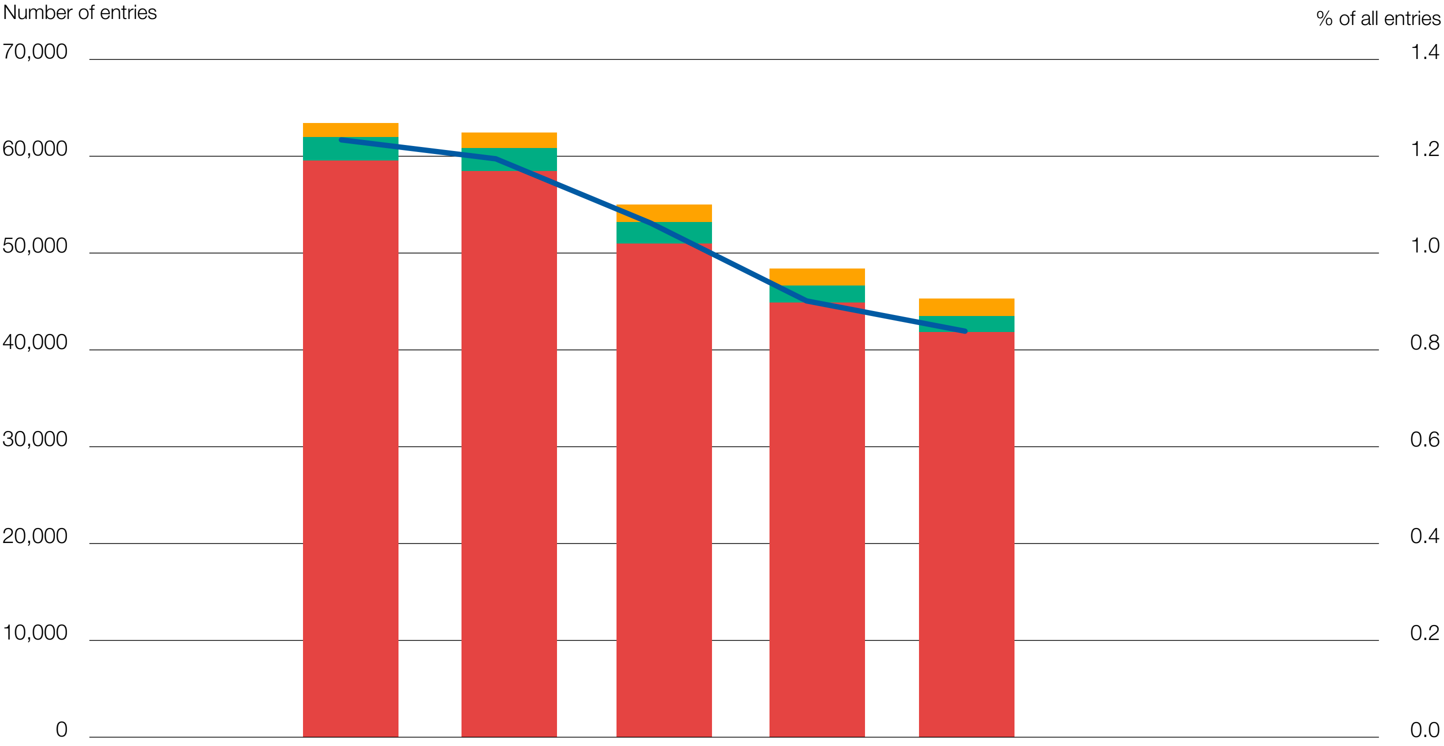
	2013	2014	2015	2016	2017
Into Film Festival	246,434	317,189	353,416	407,058	411,466

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

Figures 1-6 show the number of students entered for examinations in film and media specific subjects taught in schools and colleges across the UK between 2013/14 and 2017/18.

As Figure 1 shows, there has been a 30% decrease in the total number of students entering GCSE media, film or TV studies in England, Wales and Northern Ireland since 2013/014. However, while the annual number of entries in both England and Wales have been on a downward trend over the period, the opposite is true for Northern Ireland which has seen an overall increase in numbers. Total entries in 2017/18 were just under 45,300, less than 1% of all GCSE entries.

Figure 1 Entries for GCSE media/film/TV studies in England, Wales and Northern Ireland, 2013/14-2017/18



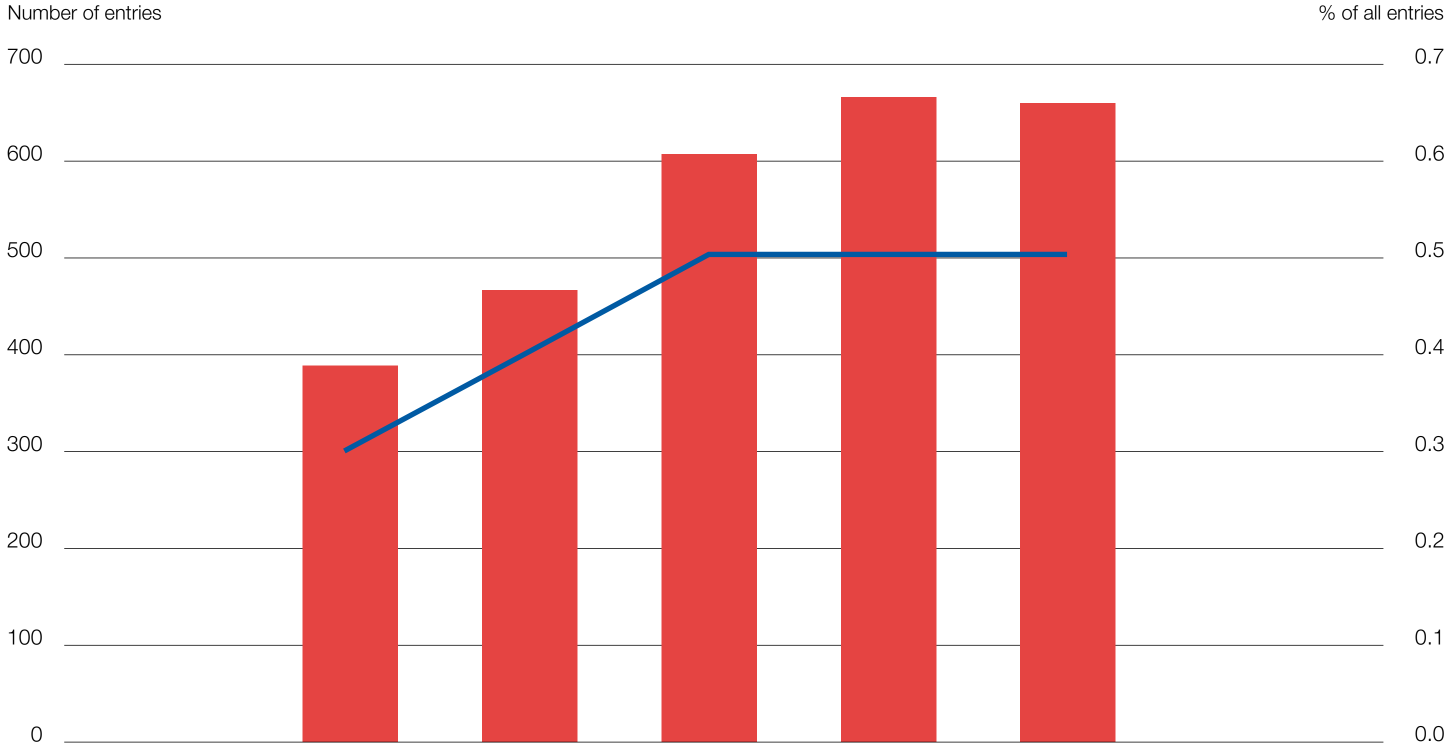
	2013/14	2014/15	2015/16	2016/17	2017/18	% change 2016-2018	% change 2013-2018
England	59,536	58,496	50,957	44,865	41,832	-6.8	-29.7
Wales	2,456	2,350	2,248	1,780	1,663	-6.6	-32.3
Northern Ireland	1,444	1,606	1,771	1,717	1,789	4.2	23.9
Total	**63,436**	**62,452**	**54,976**	**48,362**	**45,284**	**-6.4**	**-28.6**
All GCSE entries	5,217,573	5,277,604	5,240,796	5,443,072	5,470,076	0.2	4.8
Total entries as % of all GCSE entrants	1.2	1.2	1.0	0.9	0.8	-	-

Source: Joint Council for Qualifications (JCQ)

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

As Figure 2 shows, since 2013/14 there has been an overall upward trend in the annual number of entries for the GCSE in moving image arts offered by Northern Ireland's Council for the Curriculum, Examinations and Assessment (CCEA). Entries for the qualification rose by 70% over the period compared to a 17% rise in the number of entries for all GCSEs offered in Northern Ireland. (The qualification was also offered in Scotland through a limited scheme run by Screen Education Edinburgh, with awards made in 2015/16.)

Figure 2 Entries for GCSE moving image arts in Northern Ireland, 2013/14-2017/18



	2013/14	2014/15	2015/16	2016/17	2017/18	% change 2016-2018	% change 2013-2018
GCSE moving image arts entries	389	467	607	666	660	-0.9	69.7
All GCSE entries in Northern Ireland	124,891	128,382	126,964	137,486	146,451	6.5	17.3
Moving image arts as % of all entries	0.3	0.4	0.5	0.5	0.5	-	-

Source: CCEA

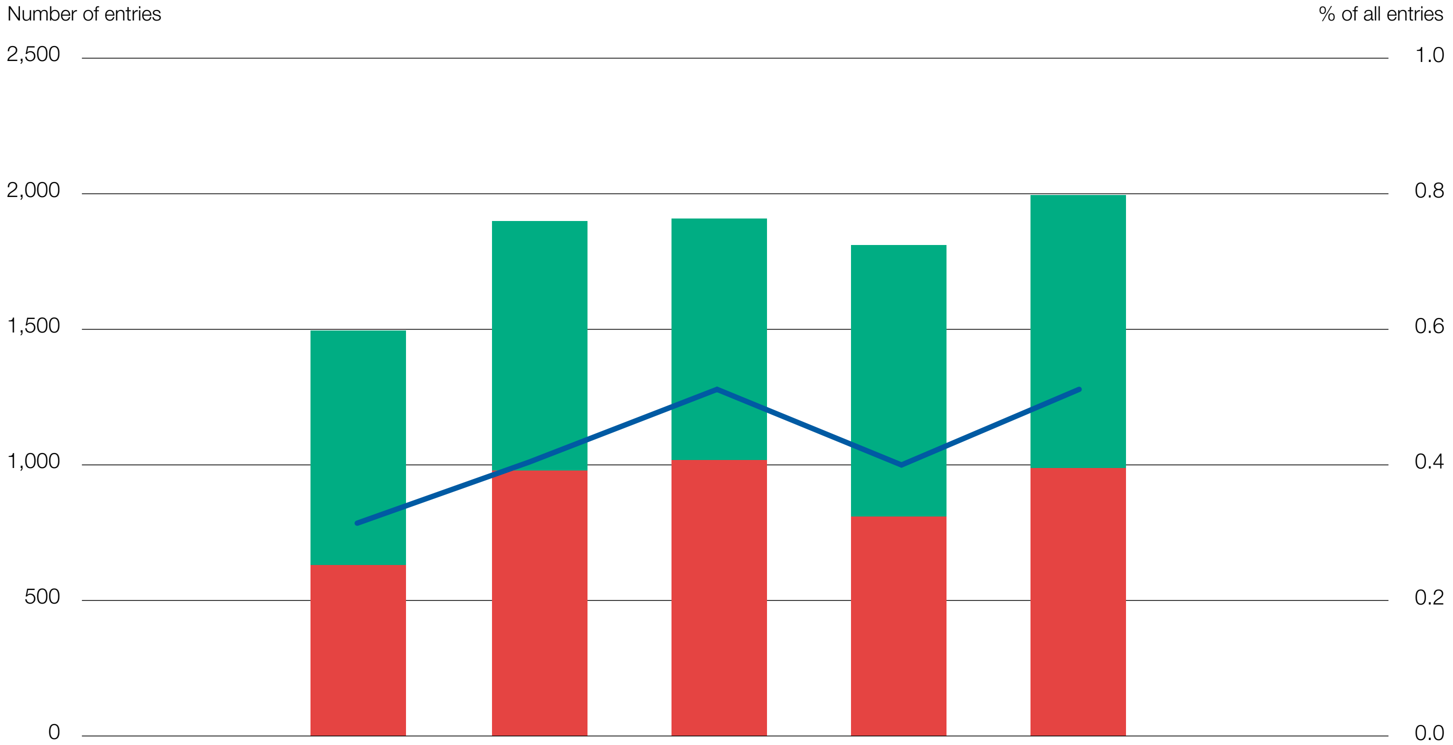
Notes:

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

Data for 2016/17 updated since publication of the 2017 Statistical Yearbook.

In total, there were 1,994 entries for Scottish Intermediate Levels 1 and 2/National Levels 4 and 5 media studies in 2018, just over 0.5% of all equivalent level entries (Figure 3). Although the total number of entries for these qualifications in all subjects has decreased over the period, there has been an overall upward trend in the annual number of entries for media studies, with entries in 2018 up 33% compared with 2014.

Figure 3 Entries for Scottish Intermediate/National Level media studies, 2014-2018



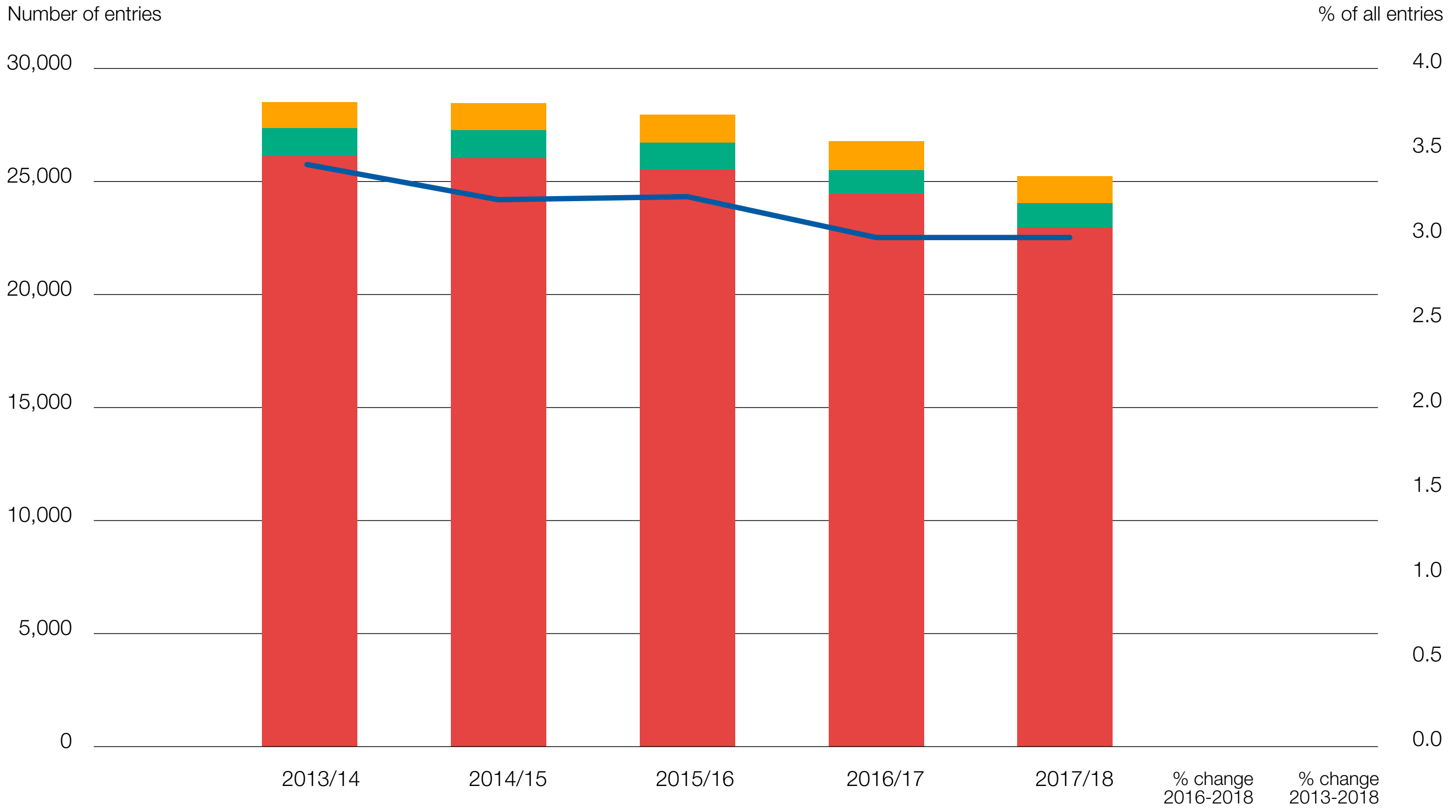
	2014	2015	2016	2017	2018	% change 2017-2018	% change 2014-2018
Intermediate Level 1/National Level 4 media studies entries	629	979	1,018	808	987	22.2	56.9
Intermediate Level 2/National Level 5 media studies entries	866	920	889	1,003	1,007	0.4	16.3
Total	**1,495**	**1,899**	**1,907**	**1,811**	**1,994**	**10.1**	**33.4**
All Intermediate Level 1/ National Level 4 entries	150,390	132,429	122,961	116,032	106,033	-8.6	-29.5
All Intermediate Level 2/ National Level 5 entries	310,725	298,694	295,083	293,220	281,785	-3.9	-9.3
Total all entries	461,115	431,123	418,044	409,252	387,818	-5.2	-15.9
Media studies as % of all entries	0.3	0.4	0.5	0.4	0.5	-	-

Source: Scottish Qualifications Authority (SQA)

Note: Data for 2016 updated since publication of the 2017 Statistical Yearbook.

The total number of students taking GCE A Level media, film or TV studies in England, Wales and Northern Ireland has fallen by 11% since 2013/14 (Figure 4). As with GCSE entries in these subjects, the overall trend is not reflected in Northern Ireland, where entries increased by 6% over the same period. The total number of entries across the nations in 2017/18 was just over 25,200, 3% of all GCE A Level entries.

Figure 4 Entries for GCE A Level media/film/TV studies in England, Wales and Northern Ireland, 2013/14-2017/18



	2013/14	2014/15	2015/16	2016/17	2017/18	% change 2016-2018	% change 2013-2018
England	26,116	26,036	25,516	24,450	22,968	-6.1	-12.1
Wales	1,247	1,224	1,197	1,048	1,065	1.6	-14.6
Northern Ireland	1,134	1,207	1,250	1,275	1,207	-5.3	6.4
Total	**28,497**	**28,467**	**27,963**	**26,773**	**25,240**	**-5.7**	**-11.4**
All GCE A Level entries	833,807	850,749	836,705	828,355	811,776	-2.0	-2.6
Media/film/TV studies as % of all entries	3.4	3.3	3.3	3.2	3.1	-	-

Source: Joint Council for Qualifications (JCQ)

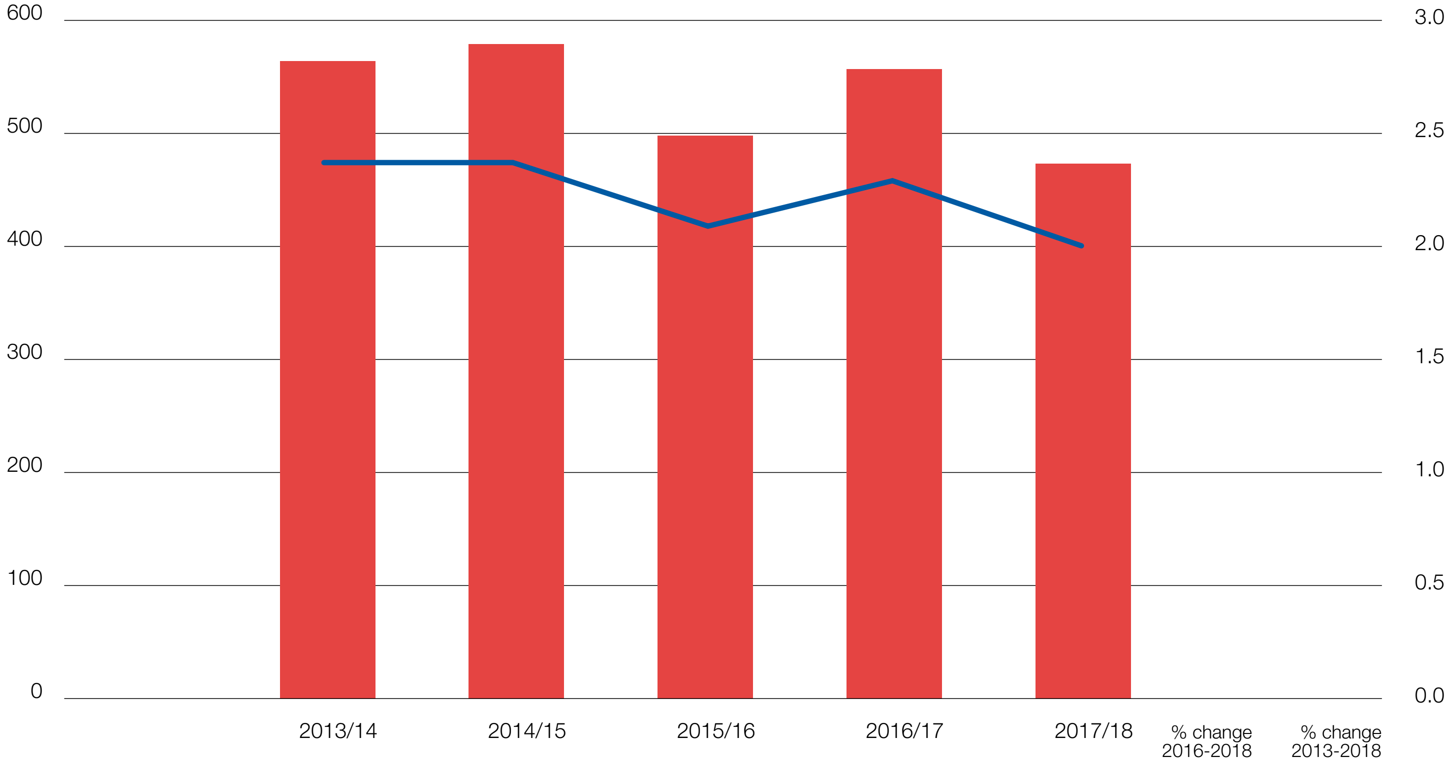
Notes:

Data for 2015/16 updated since publication of the 2017 Statistical Yearbook.

See notes to Figure 1.

As Figure 5 shows, the annual number of entries for the GCE A Level in moving image arts in Northern Ireland has fluctuated since 2013/14. Entries for the qualification in 2017/18 were down 16% on 2013/14 compared with a 1% rise in the number of entries for all A Levels offered in Northern Ireland over the same period.

Figure 5 Entries for GCE A Level moving image arts in Northern Ireland 2013/14-2017/18



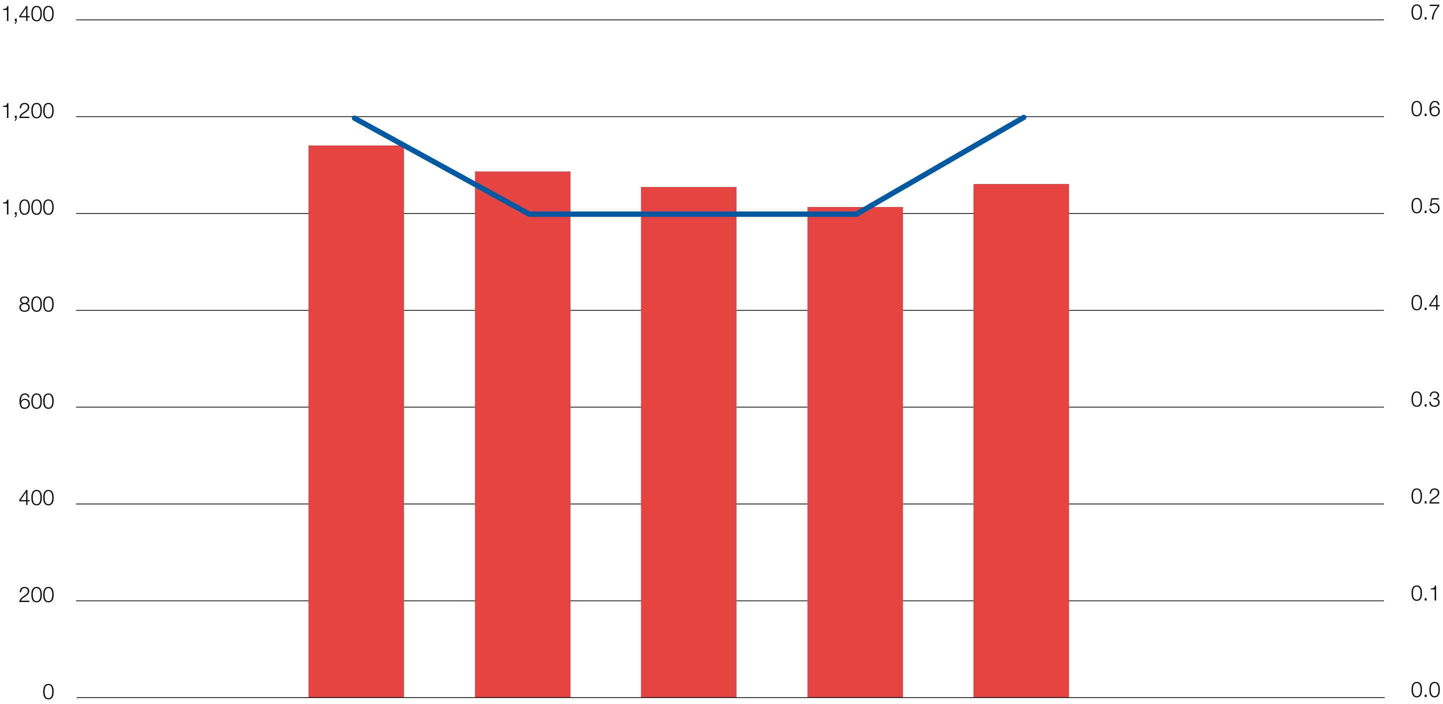
	2013/14	2014/15	2015/16	2016/17	2017/18	% change 2016-2018	% change 2013-2018
GCE A Level moving image arts entries	564	579	498	557	473	-15.1	-16.1
All GCE A Level entries in Northern Ireland	23,537	24,445	24,165	24,726	23,737	-4.0	0.8
Moving image arts as % of total entries	2.4	2.4	2.1	2.3	2.0	-	-

Source: CCEA

Data for 2016/17 updated since publication of the 2017 Statistical Yearbook.

The number of entries for Scottish Higher Level 2/National Level 6 media studies has seen a slight downward trend overall since 2014 (Figure 6). However, as a percentage of all equivalent entries, media studies entries have remained fairly constant at between 0.5% and 0.6%.

Figure 6 Entries for Scottish Higher/National Level media studies, 2014-2018



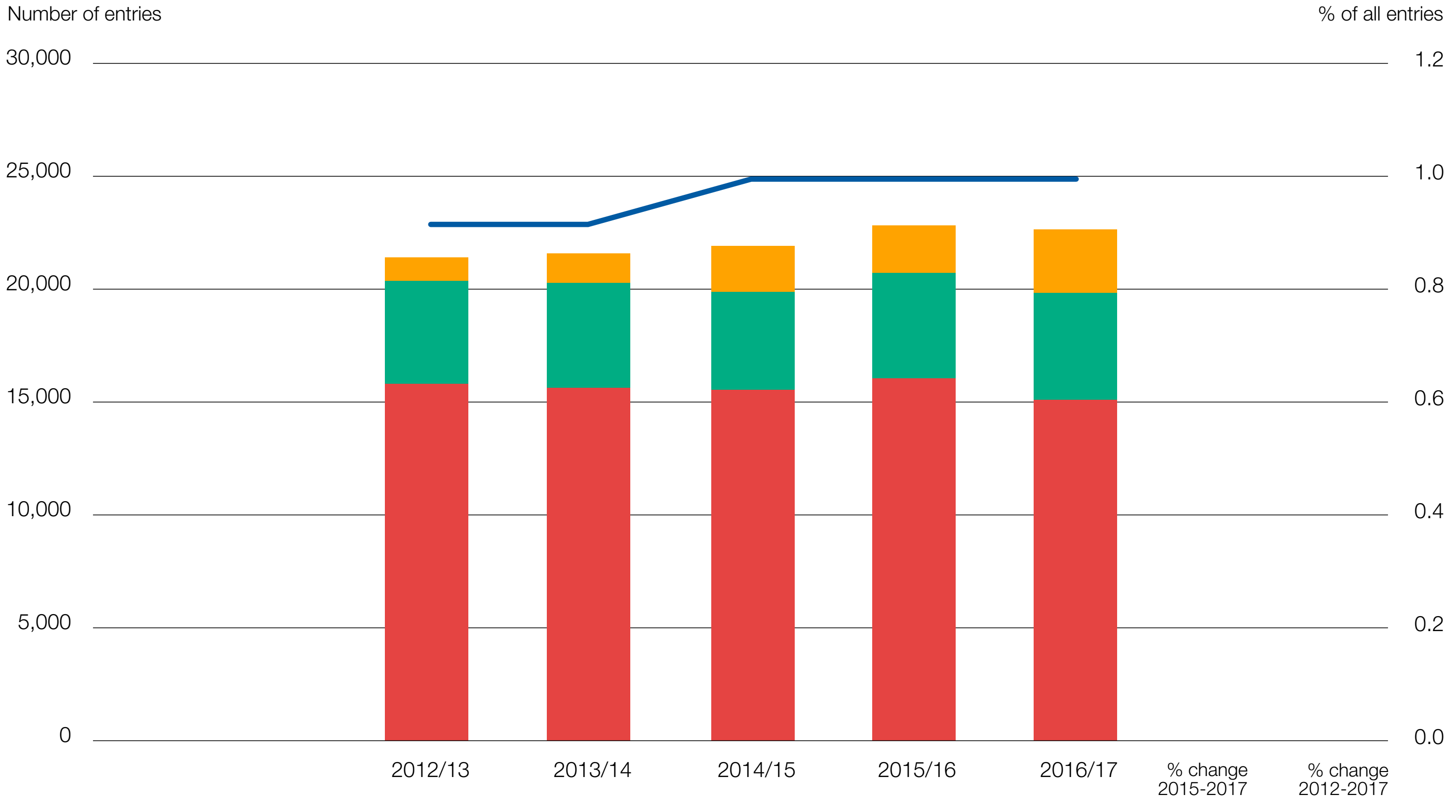
	2014	2015	2016	2017	2018	% change 2017-2018	% change 2014-2018
Higher Level 2/National Level 6 media studies entries	1,140	1,087	1,055	1,013	1,061	4.7	-6.9
All Higher Level 2/National Level 6 entries	191,859	199,850	197,774	194,813	191,951	-1.5	<0.1
Media studies as % of total entries	0.6	0.5	0.5	0.5	0.6	-	-

Source: Scottish Qualifications Authority (SQA)

Study of the moving image and allied creative industries remains popular in UK higher education through film and media studies courses. As Figure 7 shows, just under 22,700 students were enrolled on such courses in 2016/17 (the latest year for which data are available), a slight decrease on the number of entries in 2015/16, but up 6% on 2012/13.

While entries for both media studies and film studies courses have fluctuated between 2012/13 and 2016/17 the number of students undertaking film production courses has increased each year over the period. There were 2,810 entries for film production courses in 2016/17, a rise of 170% compared with 2012/13.

Figure 7 Higher education entries in film and media studies, 2012/13-2016/17



	2012/13	2013/14	2014/15	2015/16	2016/17	% change 2015-2017	% change 2012-2017
Media studies	15,780	15,640	15,550	16,035	15,130	-5.6	-4.1
Film studies	4,570	4,640	4,335	4,680	4,725	1.1	3.4
Film production	1,040	1,305	2,035	2,090	2,810	34.4	170.2
Total	**21,390**	**21,585**	**21,920**	**22,805**	**22,665**	**-0.6**	**6.0**
All Higher Education entries	2,340,470	2,299,355	2,266,075	2,280,830	2,317,880	1.6	-1.0
% of all entries	0.9	0.9	1.0	1.0	1.0	-	-

Source: HESA

Notes:

Data have been rounded to the nearest multiple of 5.

Includes first degree, post-graduate and other degrees.

Media studies courses include other media, film, television, radio, electronic and print-based media studies courses.

Many of the film and media related further and higher education courses are accredited (via the 'Tick' quality mark) by ScreenSkills (formerly Creative Skillset), the UK-wide strategic skills body for the creative industries. The ScreenSkills Tick is an assurance that courses provide the most up-to-date and relevant industry training and education. In 2016/17 (the final year covered in the chart above) 213 accredited courses were offered across the UK, the majority of which were higher education programmes. In 2017/18, 215 courses were accredited. These included 27 courses in film production, nine courses in screenwriting and four in post-production.

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, Creative 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 UK. In 2017/18 the Academy worked with 42 delivery partners reaching 893 young people from across the UK (Table 3). Of these students, 193 attended residential courses over the year. In 2017, the BFI piloted the Film Academy Future Skills trainee programme which aims to provide career opportunities in film to under-represented young people. The pilot, which was run in partnership with Star Wars producer Lucasfilm, enabled 28 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 *Solo: A Star Wars Story.*

Across all Academy programme activity in 2017/18, 49% of the participants were female, 25% were from black and minority ethnic backgrounds and 13% were disabled.

Table 3 BFI Film Academy participants, 2013/14-2017/18 (ranked by 2017/18 enrolment)

Nation/region	2013/14	2014/15	2015/16	2016/17	2017/18
England	552	582	679	715	700
London	146	148	146	150	146
South West	70	71	97	110	101
East of England	66	62	71	71	83
South East	74	73	88	109	81
Yorkshire and The Humber	31	37	78	82	73
North West	57	57	52	54	69
West Midlands	30	52	60	55	60
North East	42	44	47	44	46
East Midlands	36	38	40	40	41
Northern Ireland	63	85	80	80	84
Scotland	56	72	74	86	79
Wales	49	44	32	46	30
Total	**720**	**783**	**865**	**927**	**893**

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 2017/18 included: Ffilm Cymru Wales' Foot in the Door, a training programme run in partnership with local housing associations, which provided opportunities for individuals who were not in employment, education or training to work on film and television productions; JUMPCUT, run by Film City Futures in association with Film City Glasgow and Sigma Films, which gave 25 Scottish 16-25 year olds the chance to develop hands-on experience in an industry environment by forming a production company and making a professional short film; the Nerve Centre's Support Week for primary school teachers in Northern Ireland which taught participants creative ways to use technology in the classroom to enhance learning; and Tyneside Cinema's Film & More scheme which provided adults with opportunities to learn about cinema through talks and screenings hosted by filmmakers, critics and academics.

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 (A Level) 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 2017/18, there were over 47,100 admissions to education events run by BFI Southbank and BFI festivals, a fall from the 48,100 admissions seen in 2016/17, but up 28% on 2008/09 (Table 4). The number of visits to the BFI Reuben Library also decreased, from 80,200 in 2016/17 to 77,600 in 2017/18. (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, 2008/09-2017/18

	BFI Southbank and festivals education event admissions	BFI Reuben Library visits
2008/09	36,697	12,024
2009/10	38,569	10,969
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
% change 2016/17-2017/18	-2.1	-3.3
% change 2008/09-2017/18	28.4	545.0

Source: BFI

EMPLOYMENT IN THE FILM INDUSTRY

The film industry employs substantial numbers of highly skilled workers. While employment levels are somewhat volatile, reflecting the variable level of demand for the sector's services, employment has more than doubled over the past decade. A recent report commissioned by the BFI into the skills needs of the sector suggested that if the industry continued to grow at the same pace it had over the previous five years, this could amount to a need for over 10,000 new entrants to the sector by 2020, or 25,000 people when also accounting for churn.[1]

According to the Annual Population Survey (APS) conducted by the Office for National Statistics (ONS), in 2017 around 88,000 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, 2017

Sector	Number in employment
Film and video production	64,000
Film and video distribution	7,000
Film exhibition	17,000
Total	**88,000**

Source: Office for National Statistics, Annual Population Survey

Notes:

Numbers in employment are taken from the Annual Population Survey for the period January-December 2017.

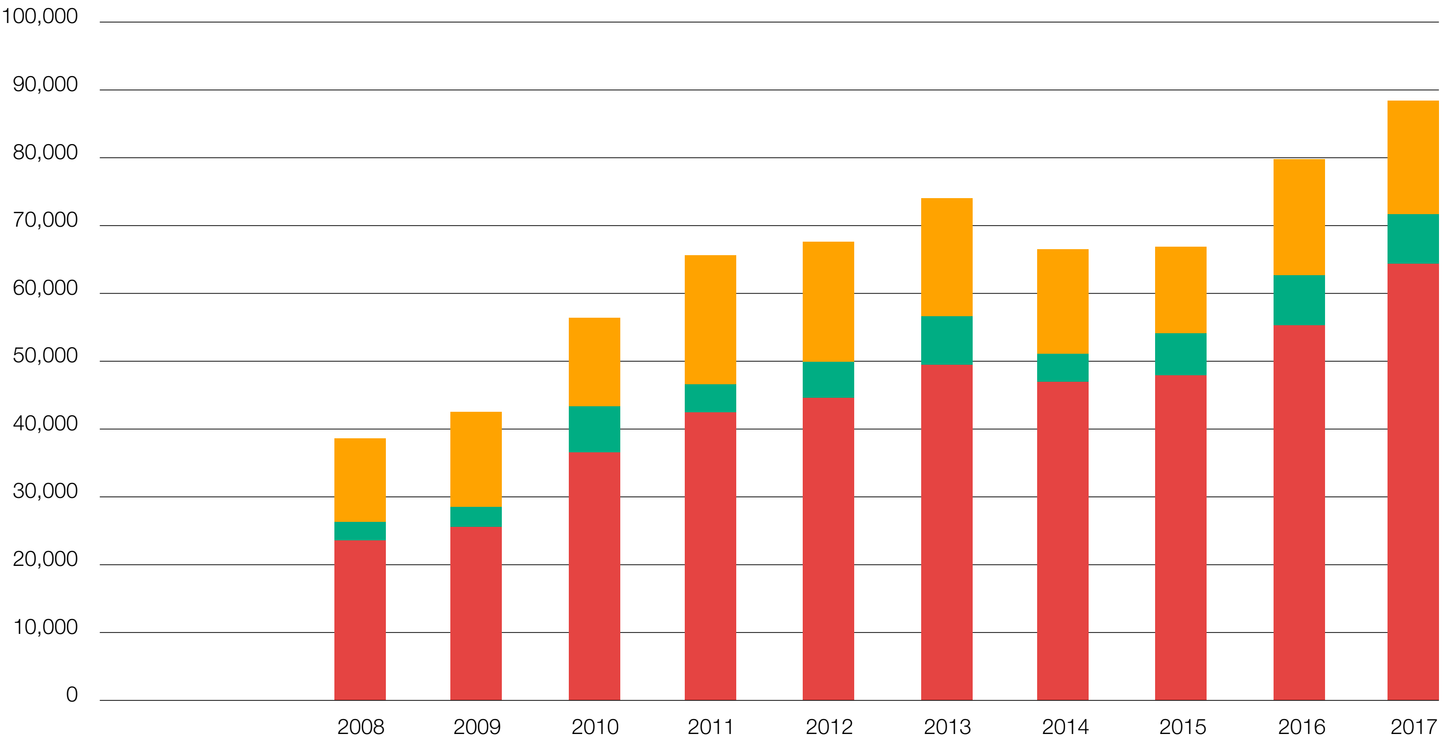
Figures are shown to the nearest 1,000.

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.

As Figure 8 shows, the overall size of the film workforce is driven by the number of employees in film and video production. (There is a large variety of job roles within production in areas ranging from art department, camera and construction to lighting, locations and music.) The film and video production workforce has increased from 24,000 in 2008 to 64,000 in 2017, while the number of workers in film and video distribution has been 7,000 or fewer during the period. The film exhibition workforce has increased from 13,000 in 2010 to 17,000 in 2017 but was as high as 18,000 in 2012 and 19,000 in 2011.

[1] *A Skills Audit of the UK Film and Screen Industries*, 2017, The Work Foundation

Figure 8 Size of the film workforce, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Film and video production	24,000	26,000	37,000	42,000	45,000	49,000	47,000	48,000	55,000	64,000
Film and video distribution	3,000	3,000	7,000	4,000	5,000	7,000	4,000	6,000	7,000	7,000
Film exhibition	12,000	14,000	13,000	19,000	18,000	17,000	15,000	13,000	17,000	17,000

Source: Office for National Statistics, Annual Population Survey

The production sector has traditionally employed a high proportion of freelance workers. In 2017, 50% of those engaged in film and video production, a total of more than 32,000 people, were self-employed (Table 6). In comparison, only 18% of the total UK workforce was self-employed in 2017.

Table 6 Film and video production workforce, 2008-2017

Year	Total in employment	Self-employed	Self-employed as % of total
2008	24,000	12,000	50
2009	26,000	15,000	60
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

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 note to Figure 8.

WRITERS AND DIRECTORS OF UK INDEPENDENT FILMS, 2003-2017

We have information on 1,722 writers and 1,338 directors associated with UK independent films released in the UK between 2003 and 2017 (not including re-releases of classic films). Over 86% of the writers and over 81% of the directors have been associated with just one UK independent film during this time, which illustrates how difficult it is to make the leap from first to second feature and to sustain a filmmaking career (Tables 7 and 8).

However, as we are looking only at UK independent films released between 2003 and 2017 it is possible that some writers and directors were involved with more films than these figures indicate. Some might have been involved with earlier films, others will have made successful non-UK films, worked on studio-backed UK films or moved into television. There are also likely to be some writers and directors who have made just one film so far, but will go on to make many more films. Rupert Wyatt is a good example of a director who appears only once in these data but who has directed more than one successful film. His one independent UK film is *The Escapist* which was released in 2008. In addition, he has directed two successful American films, *Rise of the Planet of the Apes*, released in 2011 and *The Gambler*, released in 2014. (Wyatt's latest feature film is another American production, *Captive State*, which is scheduled for release in 2019.)

The writers who have been involved with the greatest number of UK independent films are Paul Laverty with eight films followed by Noel Clarke, Frank Cottrell Boyce, James Erskine and Michael Winterbottom all with seven films. Tony Grisoni and Ronald Harwood are next with six films each. The directors of the greatest number of UK independent films were Michael Winterbottom with 12 films, Ken Loach with 11 films, Stephen Frears with nine films and James Erskine with eight films.

Table 7 Numbers of films by writers of UK independent films, release years 2003-2017

Number of films written or co-written	Number of writers	% of writers
1	1,486	86.3
2	147	8.5
3	49	2.8
4	25	1.5
5	8	0.5
6	2	0.1
7	4	0.2
8	1	0.1
Total	**1,722**	**100.0**

Source: comScore, BFI RSU analysis

Table 8 Numbers of films by directors of UK independent films, release years 2003-2017

Number of films directed or co-directed	Number of directors	% of directors
1	1,088	81.3
2	150	11.2
3	58	4.3
4	27	2.0
5	4	0.3
6	7	0.5
8	1	0.1
9	1	0.1
11	1	0.1
12	1	0.1
Total	**1,338**	**100.0**

Source: comScore, BFI RSU analysis

THE GENDER OF WRITERS AND DIRECTORS OF UK FILMS

We have been tracking the gender of writers and directors of UK films since 2005. The under-representation of women in these roles has been the subject of a number of subsequent reports including *Writing British Films – who writes British films and how they are recruited* (Susan Rogers, Royal Holloway and UK Film Council, 2007) and *Succès de plume? Female screenwriters and directors of UK films, 2010-2012* (BFI, 2013). Most recently, the BFI Filmography, a database drawing on credits from over 10,000 UK films, has provided further perspective on the gender imbalance across the UK film workforce. In terms of writers and directors involved with UK films, it found that over the last three decades there has been little significant change in the gender ratios associated with these roles: the proportion of women writers has averaged around 14% since the 1990s, while the proportion of women directors has increased from 10.3% in the 1990s to 13.5% in the period 2010-2017.

In 2017, of the 209 identified writers of UK films released during the year, 44 (21%) were women; this is the first time since our records began that the percentage of female writers has been above 20% (Table 9). Female writers associated with UK films released in the year include: Alice Birch (*Lady Macbeth*), Moira Buffini and Gurinder Chadha (*Viceroy's House*), Gaby Chiappe (*Their Finest*), Jane Goldman (*Kingsman: The Golden Circle, The Limehouse Golem*), Blanche McIntyre (*The Hippopotamus*) and Alex von Tunzelmann (*Churchill*).

Table 9 Gender of writers of UK films released in the UK, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of UK films released in the UK	111	114	119	127	162	139	154	209	176	159
Number of writers associated with these films	168	140	143	159	187	155	211	285	233	209
Number of male writers	139	117	126	129	162	133	181	244	195	165
Number of female writers	29	23	17	30	25	22	30	41	38	44
% male	82.7	83.6	88.1	81.1	86.6	85.8	85.8	85.6	83.7	78.9
% female	17.3	16.4	11.9	18.9	13.4	14.2	14.2	14.4	16.3	21.1

Source: BFI

Table 10 shows directors by gender for UK films released in the UK between 2008 and 2017. The number of female directors in 2017 (28) was the highest of the period, but in percentage terms (16%) was the second highest of the period. Some of the female directors associated with UK films released in the year are: Clio Barnard (*Dark River*), Gurinder Chadha (*Viceroy's House*), Alex Helfrecht (*The White King*), Patty Jenkins (*Wonder Woman*), Alice Lowe (*Prevenge*), Rungano Nyoni (*I Am Not a Witch*), Sally Potter (*The Party*) and Lone Scherfig (*Their Finest*). In addition to Gurinder Chadha, Clio Barnard, Alex Helfrecht, Alice Lowe, Rungano Nyoni and Sally Potter wrote or co-wrote the scripts of their films as well as directing them.

Table 10 Gender of directors of UK films released in the UK, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of UK films released in the UK	111	114	119	127	162	139	154	209	176	159
Number of directors associated with these films	113	123	133	140	179	149	165	224	188	178
Number of male directors	100	102	116	119	165	128	148	203	163	150
Number of female directors	13	21	17	21	14	21	17	21	25	28
% male	88.5	82.9	87.2	85.0	92.2	85.9	89.7	90.6	86.7	84.3
% female	11.5	17.1	12.8	15.0	7.8	14.1	10.3	9.4	13.3	15.7

Source: BFI

THE WORKPLACE LOCATION

In 2017, 64% 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 11).

Table 11 London and South East employment as percentage of total, 2017

Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	31,500,000	9,500,000	30.0
Film and video production	64,000	41,000	64.0

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.

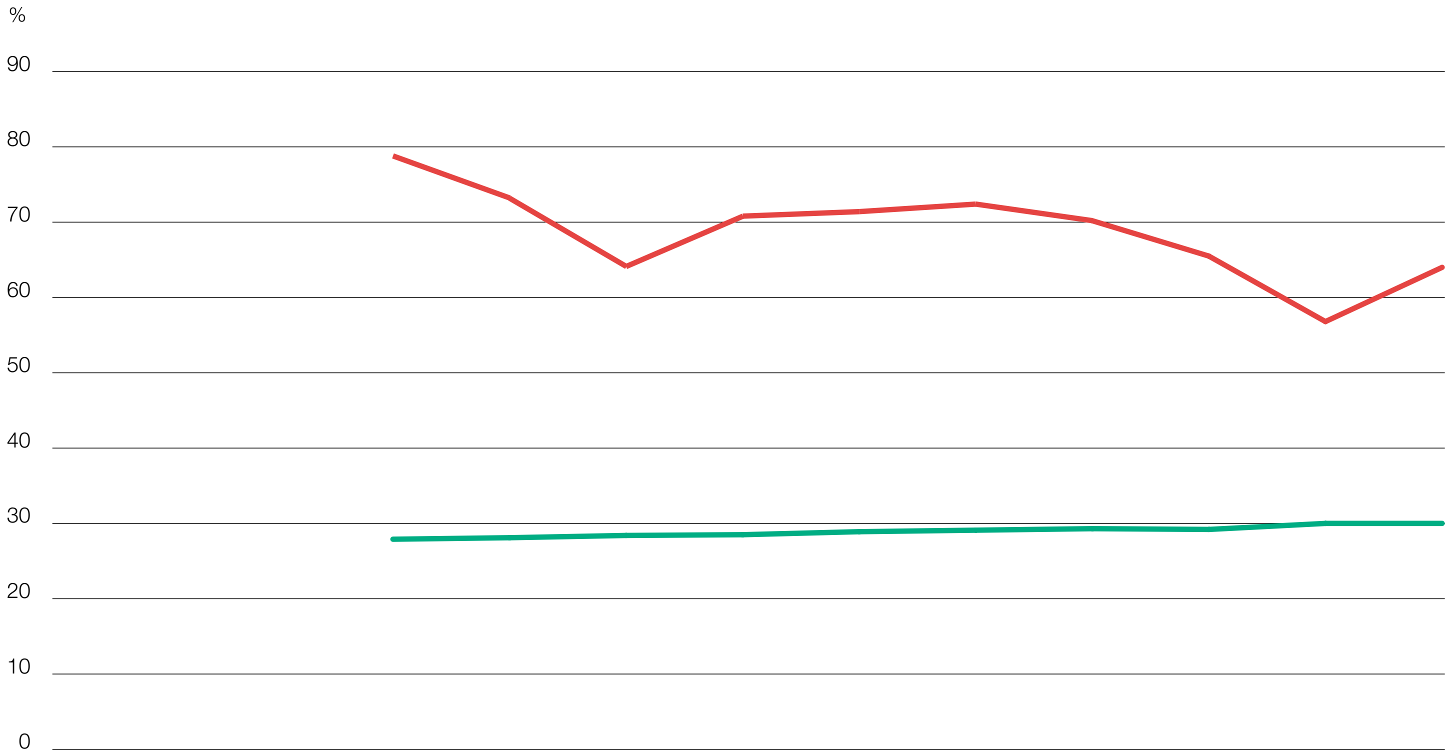
Totals shown in this table are for the calendar year 2017.

Numbers in employment in the film industry are shown to the nearest 1,000 and for all UK industries are shown to the nearest 500,000 but percentages are based on unrounded numbers.

Image: *Early Man* courtesy of StudioCanal

As Figure 9 shows, the London and South East share of the film and video production workforce is consistently higher than the equivalent share for all UK industries. While the data 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. In 2017, the London and South East share of the film and video production workforce was 64%, up from 57% in 2016, and the first percentage rise since 2013. The share of the total 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, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Film and video production	78.8	73.2	64.1	70.8	71.4	72.4	70.2	65.5	56.8	64.0
UK all industries	27.9	28.1	28.4	28.5	28.9	29.1	29.3	29.2	30.0	30.0

Source: Office for National Statistics, Annual Population Survey

THE SCALE OF THE WORKPLACE

Tables 12 to 14 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 12 to 14 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 2017 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 2017, the film and video production sector had a very large number of workplaces with low numbers of employees. As Table 12 shows, workplaces with 1-10 employees accounted for 97% of all workplaces in the sector and over half of its total workforce (52%). At the other end of the scale, there were a small number of workplaces with high numbers of employees. The 70 workplaces with 50 or more employees accounted for almost 12,000 employees, an average of 170 each.

Table 12 Numbers of employees in film and video production by size of workplace for the UK, 2017

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	70	0.5	11,920	30.5
11 - 49	340	2.6	6,874	17.6
1 - 10	12,445	96.8	20,259	51.9
Total	**12,855**	**100.0**	**39,053**	**100.0**

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

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

Employment in the film and video distribution sector in 2017 was less concentrated in small workplaces than the production sector, with 83% of employees based in workplaces with 11 or more employees and 65% of employees based in workplaces with 50 or more employees (Table 13).

Table 13 Numbers of employees in film and video distribution by size of workplace for the UK, 2017

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	15	3.2	3,629	64.7
11 - 49	45	9.7	1,019	18.2
1 - 10	405	87.1	959	17.1
Total	**465**	**100.0**	**5,607**	**100.0**

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

Table 14 shows that the concentration of workplaces in the film exhibition sector was the reverse of the production sector; workplaces with 1-10 employees accounted for 38% of all workplaces and just 6% of employees while workplaces with 11 or more employees (62% of workplaces) accounted for 94% of employees.

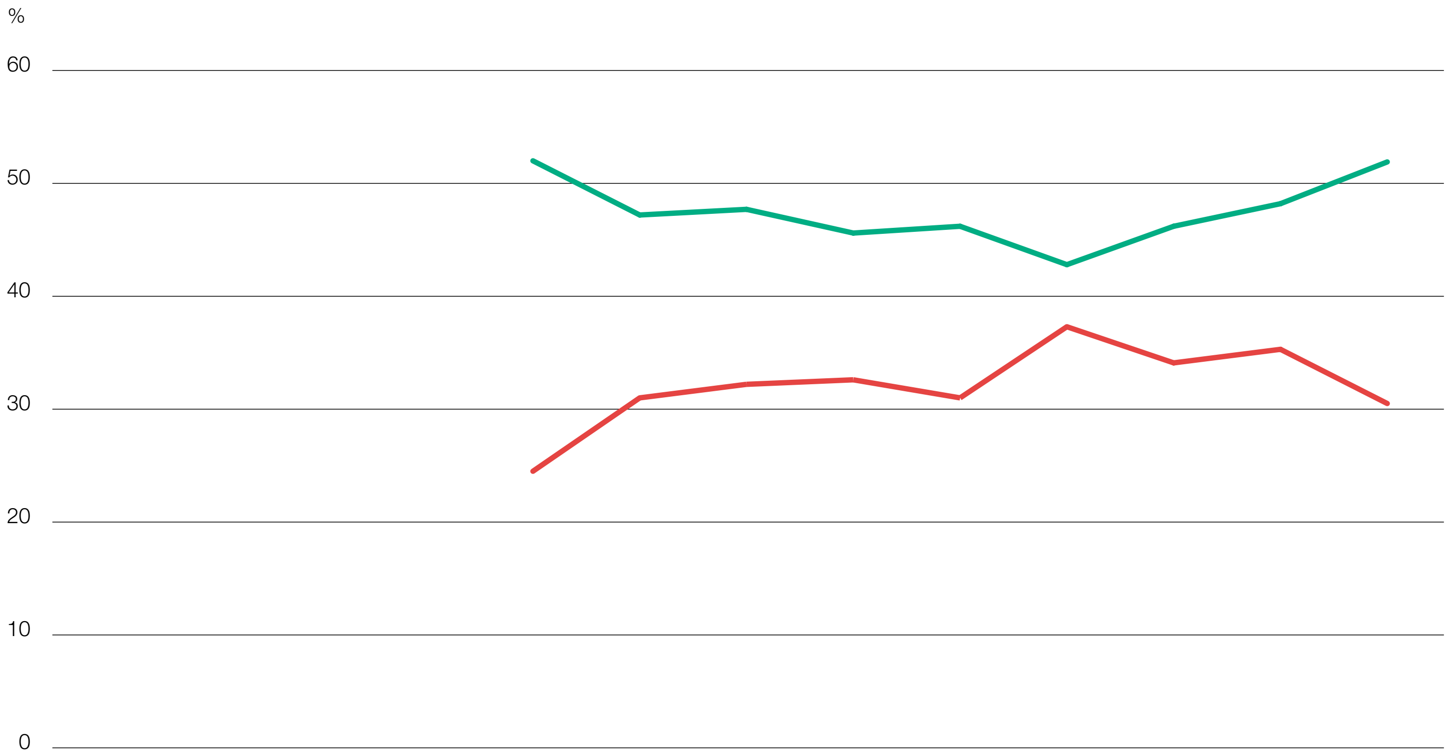
Table 14 Numbers of employees in film exhibition by size of workplace for the UK, 2017

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	140	17.7	9,977	47.1
11 - 49	350	44.3	10,016	47.3
1 - 10	300	38.0	1,169	5.5
Total	**790**	**100.0**	**21,162**	**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 employees and the percentage in workplaces with 50 or more employees from 2009 to 2017. The share of the workforce in workplaces with 1-10 employees fell from 52% in 2009 to a low of 43% in 2014 since when the percentage has increased year on year. The reverse of this trend is seen in the share of the workforce in workplaces with 50+ employees which peaked at 37% in 2014 since when the overall trend has been downward.

Figure 10 Film and video production employees by workplace size band, percentage of total, 2009-2017*

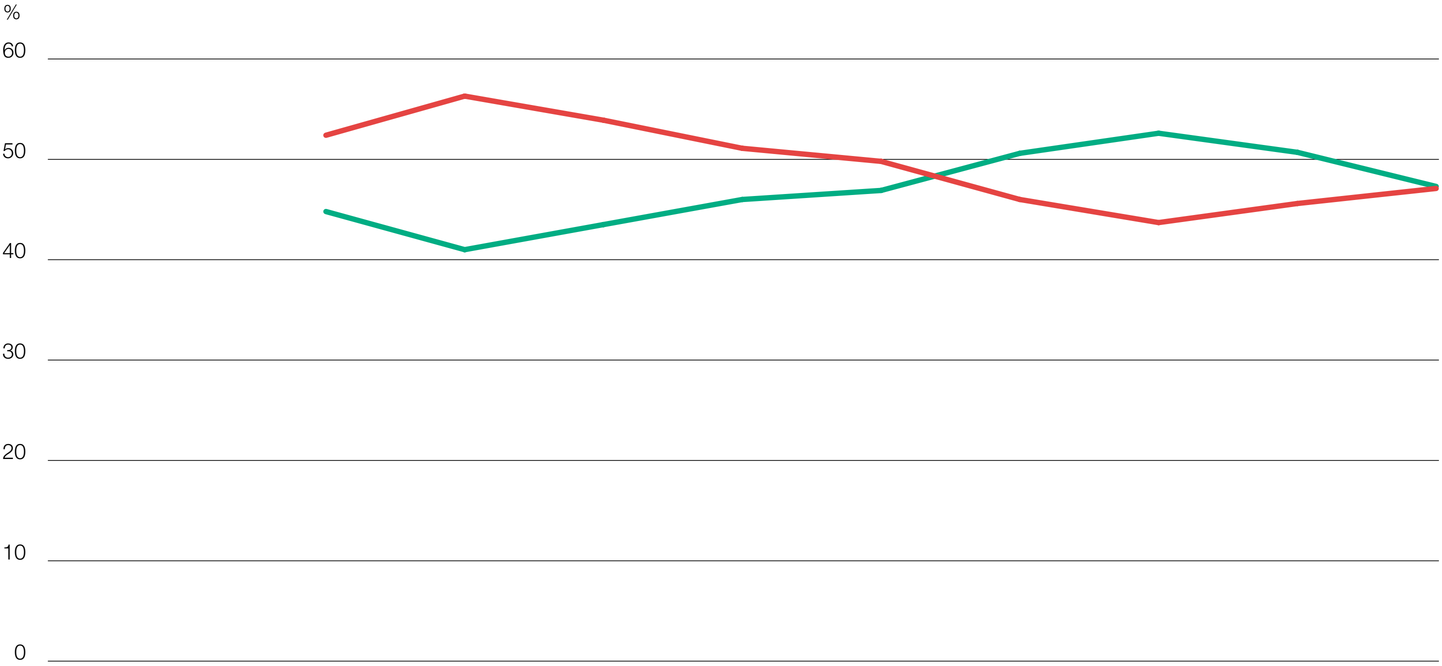


	2009	2010	2011	2012	2013	2014	2015	2016	2017
50+ employees	24.5	31.0	32.2	32.6	31.0	37.3	34.1	35.3	30.5
1-10 employees	52.0	47.2	47.7	45.6	46.2	42.8	46.2	48.2	51.9

Source: Office for National Statistics, Annual Population Survey
* The time period starts at 2009 when the IDBR replaced the APS as the basis of data on employees and workplace size.

As Figure 11 shows, 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 employees. For the first time in the period, in 2017 the share of employees for both workplace bands was statistically equal.

Figure 11 Film exhibition employees by workplace size band, percentage of total, 2009-2017*



	2009	2010	2011	2012	2013	2014	2015	2016	2017
50+ employees	52.4	56.3	53.9	51.1	49.8	46.0	43.7	45.6	47.1
11-49 employees	44.8	41.0	43.5	46.0	46.9	50.6	52.6	50.7	47.3

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

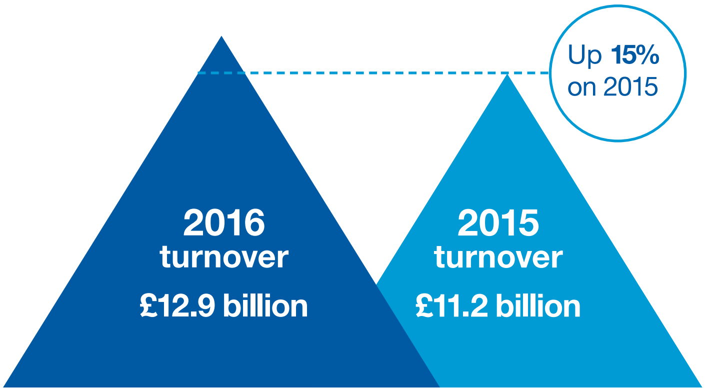
* See note to Figure 10.

THE UK FILM ECONOMY

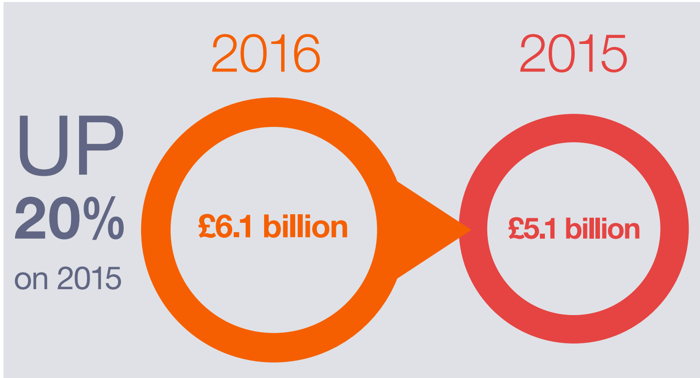
Image: *Kingsman: The Golden Circle* courtesy of Twentieth Century Fox. All rights reserved.

FACTS IN FOCUS

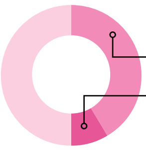
UK FILM INDUSTRY TURNOVER



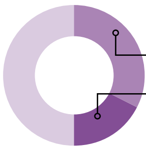
UK FILM INDUSTRY CONTRIBUTION TO GDP



UK FILM INDUSTRY EXPORTS



2016 exports were worth **£1.7 billion**
£1.4 billion in intellectual property
£0.3 billion in audiovisual and related services



2015 exports were worth **£2 billion**
£1.3 billion in intellectual property
£0.7 billion in audiovisual and related services

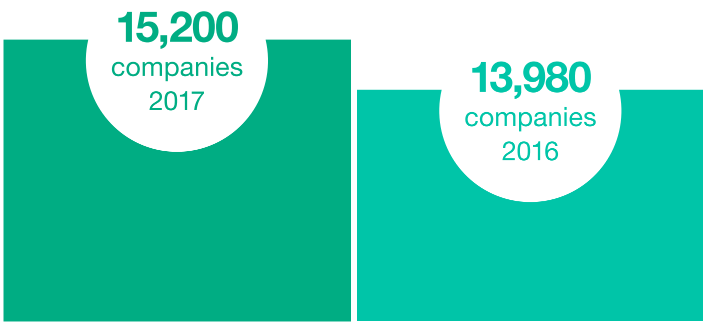
FILM TRADE BALANCE

In **2016** the film industry generated a trade surplus for the UK of **£926 million**

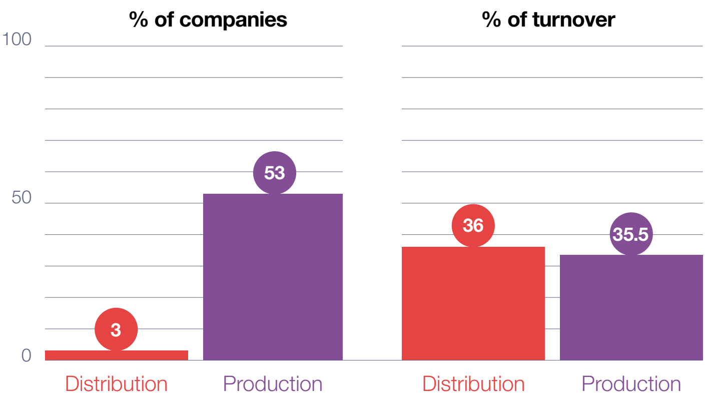
DOWN FROM

£1.2 billion in **2015**

FILM INDUSTRY COMPANIES



SHARE OF COMPANIES AND TURNOVER



COMPANY SIZE

Across all sectors the majority of companies were very small with turnover of less than **£250,000**. The exhibition sector has the greatest proportion of large companies, **the top 15** of which generated **91%** of the sector's **total turnover in 2017.**

GEOGRAPHICAL DISTRIBUTION OF COMPANIES

70% of all film companies were **concentrated in London and the South East**, generating **85%** of turnover, but companies in the exhibition sector were more widely spread across the UK, with **72%** of companies and **45%** of turnover associated with exhibitors **based outside London**.

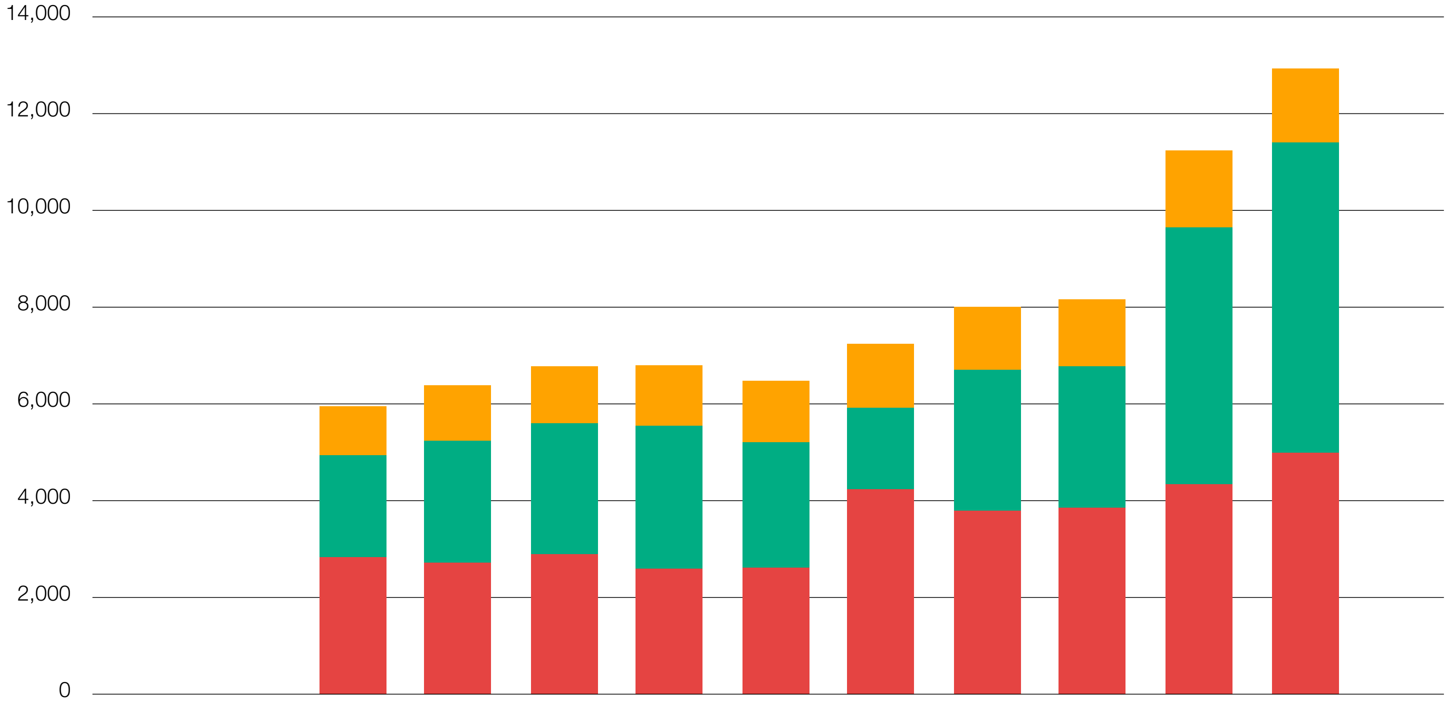
THE UK FILM ECONOMY

FILM INDUSTRY TURNOVER, 2007-2016

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 2007-2016. Each of the three sectors has shown growth over the decade, with total industry turnover increasing by 117% from £6.0 billion in 2007 to £12.9 billion in 2016, largely due to the increase in 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 2016, the combined turnover for film and video distribution increased by 120% from £2.9 billion to £6.4 billion.

Figure 1 Total turnover of UK film industry by sector, 2007-2016



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2007-2016
Film and video production (including post-production)	2,830	2,717	2,889	2,596	2,619	4,238	3,793	3,852	4,344	4,990	76.3
Film and video distribution	2,105	2,524	2,710	2,950	2,592	1,680	2,912	2,926	5,301	6,412	204.6
Film exhibition	1,022	1,141	1,176	1,257	1,270	1,325	1,299	1,379	1,593	1,533	50.0
Total	**5,957**	**6,382**	**6,775**	**6,803**	**6,481**	**7,243**	**8,004**	**8,157**	**11,238**	**12,935**	**117.1**

Source: Office for National Statistics Annual Business Survey

Notes:

'Total turnover' is expressed in current values, ie 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 2003 and 2007. The SIC codes can be found at https://www.gov.uk/government/publications/standard-industrial-classification-of-economic-activities-sic.

For 2007 data are for 2003 SIC codes 9211 (film and video production), 9212 (film and video distribution) and 9213 (film exhibition).

From 2008 onwards, 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 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV programme distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

The figures for 2014 and 2015 have been revised since publication of the 2017 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 and highlight the relative importance of the post-production sector (14% of turnover, although this includes activity associated with video and TV as well as film).

Table 1 Total turnover of UK film industry by sub-sector, 2016

Sub-sector	Turnover (£ million)	% of total
Film production	2,869	22.2
Video production	270	2.1
Film, video and TV post-production	1,851	14.3
Film distribution	6,325	48.9
Video distribution	87	0.7
Film exhibition	1,533	11.9
Total	**12,935**	**100.0**

Source: Office for National Statistics Annual Business Survey

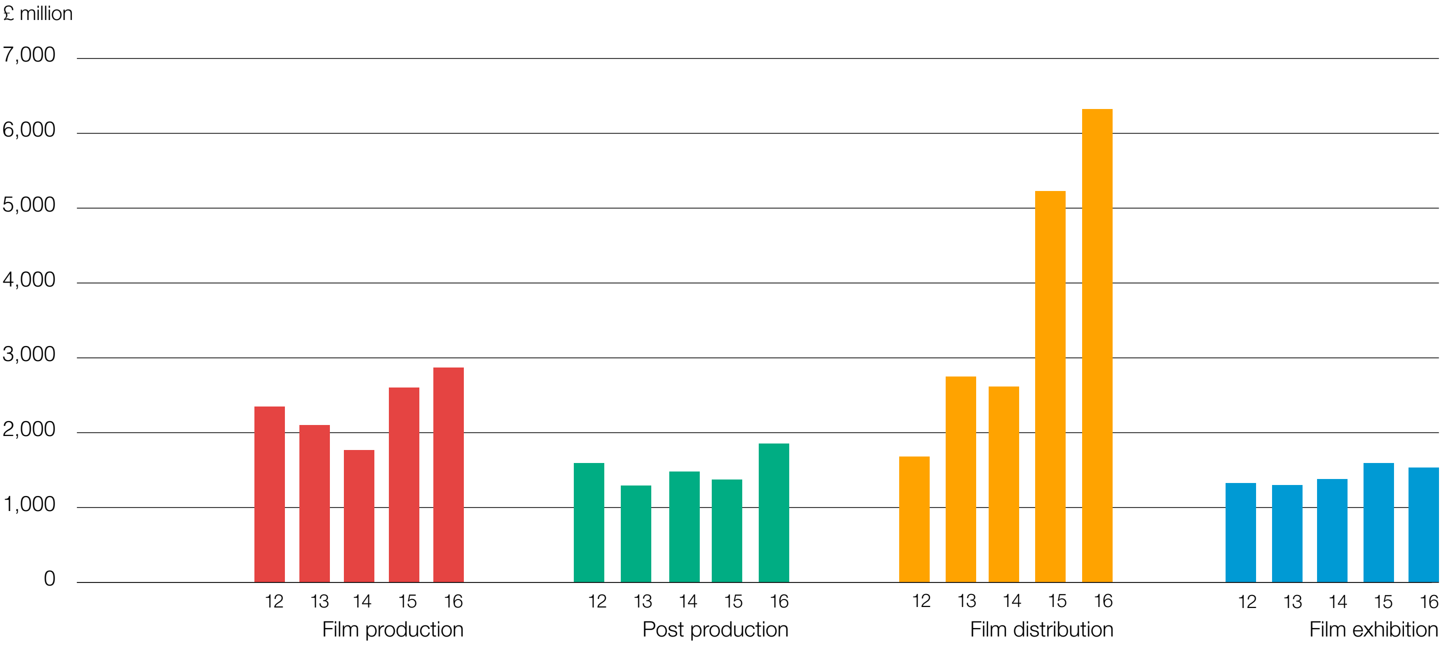
Notes:

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 2 shows the turnover for film production, film, video and TV post-production, film distribution and film exhibition from 2012 to 2016. Film distribution has traditionally had the highest turnover of all film industry sub-sectors but its value was lower than that for film production in 2012. This is partly explained by the reclassification of businesses within the distribution sector outlined above. In 2016, the turnover for film distribution increased by 20% compared with the previous year, rising from £5.2 billion to £6.3 billion, while turnover in the production sector grew by 10%, rising from £2.6 billion to £2.9 billion. The largest year-on-year increase in 2016 was seen in post-production which was up 36% on 2015, rising from £1.5 billion to £1.9 billion. Film exhibition was the only sub-sector to see a drop in turnover, falling from £1.6 billion in 2015 to £1.5 billion, a decrease of 6%.

Figure 2 Total turnover of film sub-sectors, 2012-2016



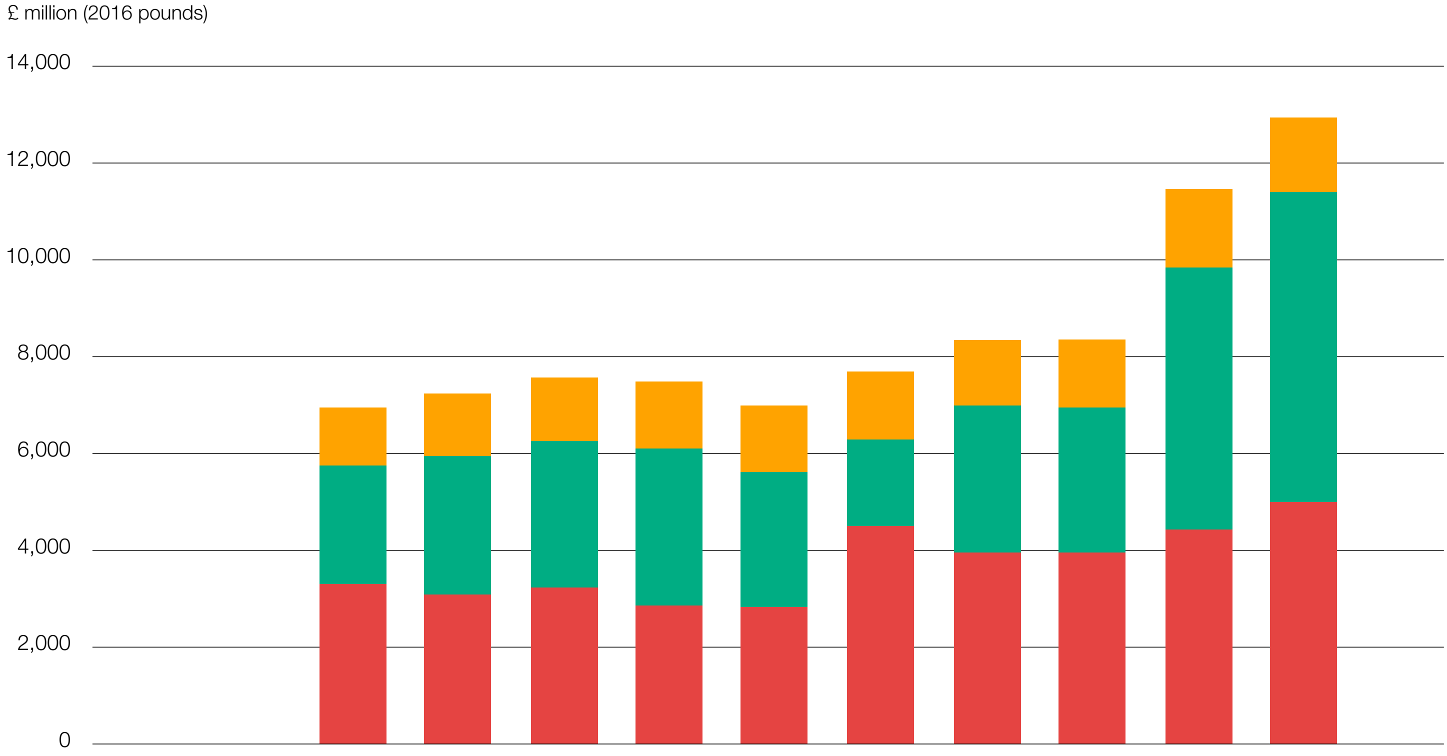
	Film production	Post production	Film distribution	Film exhibition
2012	2,346	1,590	1,680	1,325
2013	2,103	1,294	2,748	1,299
2014	1,769	1,480	2,615	1,379
2015	2,600	1,376	5,227	1,593
2016	2,869	1,851	6,325	1,533

Source: Office for National Statistics Annual Business Survey

See notes to Table 1.

Total industry turnover between 2007 and 2016 expressed in real terms, ie with the effects of inflation removed, is shown in Figure 3. The real increase since 2007 has been 161% for film and video distribution, 51% for film and video production (including post-production) and 29% for film exhibition. For the film industry as a whole, real turnover was £12.9 billion in 2016, the highest figure of the decade. The year with the lowest real turnover of the period was 2007 with a total of £6.9 billion in 2016 pounds.

Figure 3 Inflation-adjusted turnover of UK film industry by sector, 2007-2016



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2007-2016
Film and video production (including post-production)	3,301	3,082	3,228	2,856	2,824	4,500	3,952	3,946	4,430	4,990	51.2
Film and video distribution	2,455	2,863	3,028	3,245	2,795	1,784	3,034	2,997	5,405	6,412	161.2
Film exhibition	1,192	1,294	1,314	1,383	1,370	1,407	1,354	1,413	1,624	1,533	28.6
Total	**6,948**	**7,238**	**7,570**	**7,484**	**6,989**	**7,691**	**8,340**	**8,356**	**11,459**	**12,935**	**86.2**

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-march-2018-quarterly-national-accounts.

Values expressed in constant 2016 pounds.

For sector classifications, see notes to Figure 1.

For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV distribution (59133).

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.

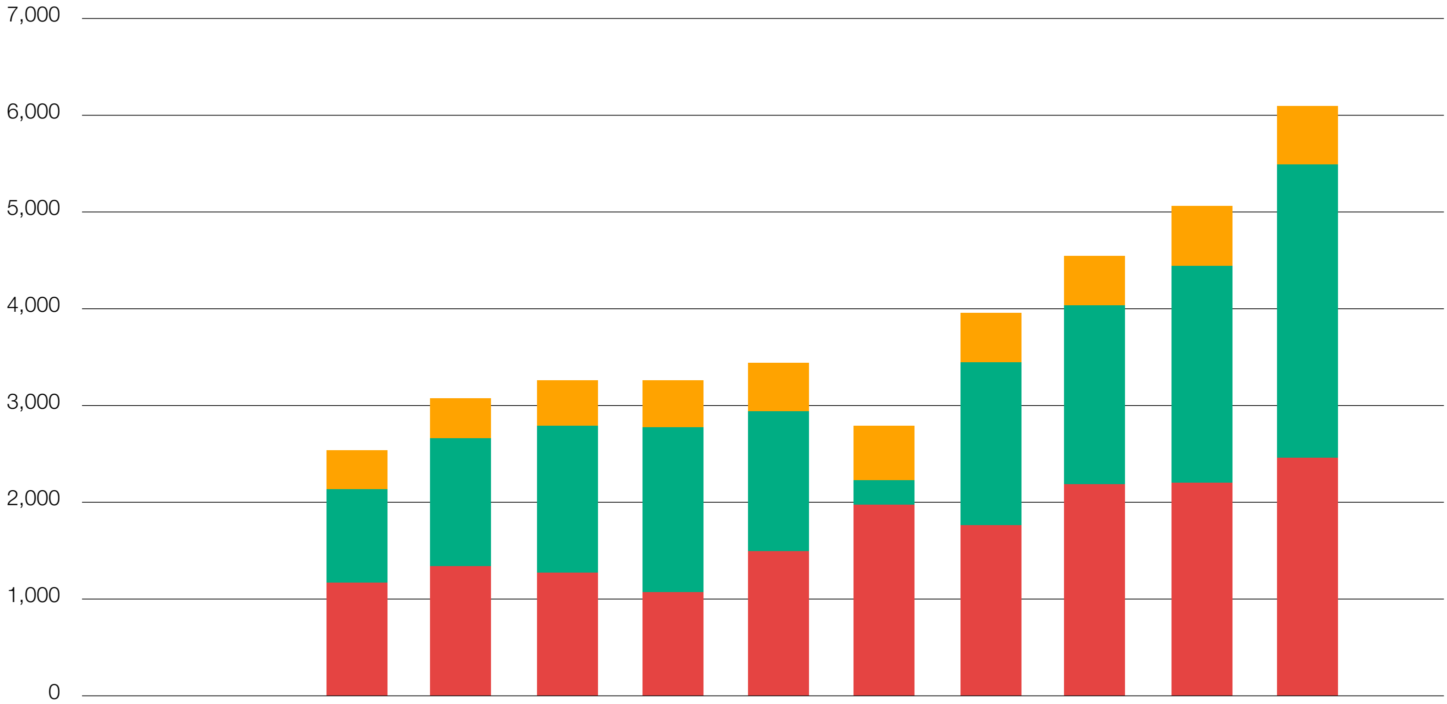
FILM INDUSTRY CONTRIBUTION TO GDP, 2007-2016

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 2016 was £6.1 billion. According to data published by the government in November 2017, the GVA for all UK creative industries in 2016 was £91.8 billion, so film accounted for almost 7% of all creative industries' value added.

As Figure 4 shows, since 2007 GVA for film has increased by over 140%. In 2016 for the film industry as a whole, distribution accounted for 50% of the total value added, production 40% and exhibition 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.)

Figure 4 UK film industry gross value added, 2007-2016



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2007-2016
Film and video production (including post-production)	1,170	1,342	1,275	1,071	1,495	1,976	1,766	2,187	2,200	2,460	110.3
Film and video distribution	964	1,317	1,517	1,706	1,442	249	1,680	1,848	2,246	3,029	214.2
Film exhibition	403	415	466	483	505	567	511	513	615	609	51.1
Total	**2,537**	**3,074**	**3,258**	**3,260**	**3,442**	**2,792**	**3,957**	**4,548**	**5,061**	**6,098**	**140.4**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey

Notes:

'Gross value added' is expressed in actual values, ie not adjusted for inflation.

For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV distribution (59133).

For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

The figures for 2014 and 2015 have been revised since publication of the 2017 Yearbook.

Table 2 shows the GVA breakdown in 2016 by the 2007 SIC codes. Film distribution was the highest single contributor at £3 billion (49% of the total). Film production is the next highest contributor with a GVA of £1.4 billion (22% of the total). These figures differ from those in Figure 4 as they show film distribution separately to video distribution and film production separately to video production and film, video and TV post-production.

Table 2 UK film industry gross value added by sub-sector, 2016

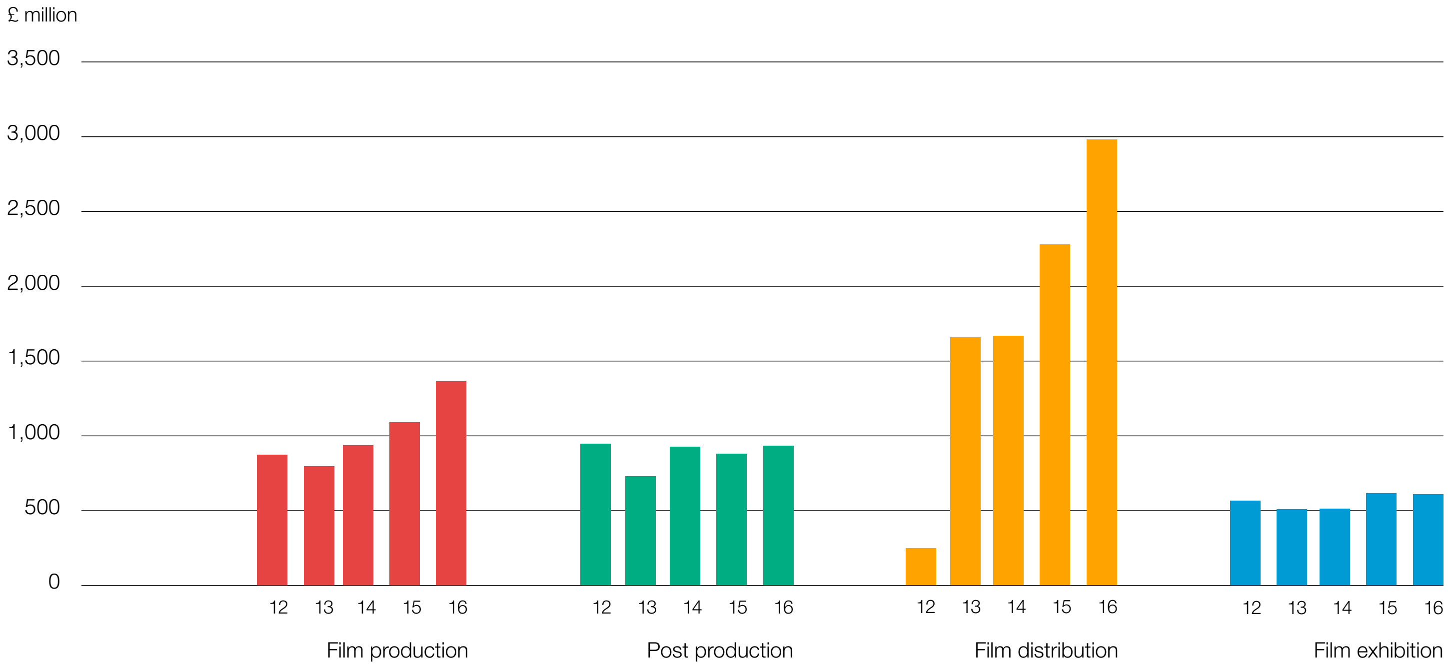
Sub-sector	GVA (£ million)	% of total
Film production	1,366	22.4
Video production	159	2.6
Film, video and TV post-production	935	15.3
Film distribution	2,980	48.9
Video distribution	49	0.8
Film exhibition	609	10.0
Total	**6,098**	**100.0**

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.

As Figure 5 shows, the patterns of GVA by sub-sector from 2012 to 2016 are similar to those for total turnover. As with turnover, film distribution typically had the highest value added but, because of the reclassification of companies within the distribution sector, in 2012 its contribution to GVA was just £249 million. Film production and distribution both saw significant increases in GVA between 2015 and 2016 while there was little change for post-production and film exhibition.

Figure 5 Gross value added of film sub-sectors, 2012-2016



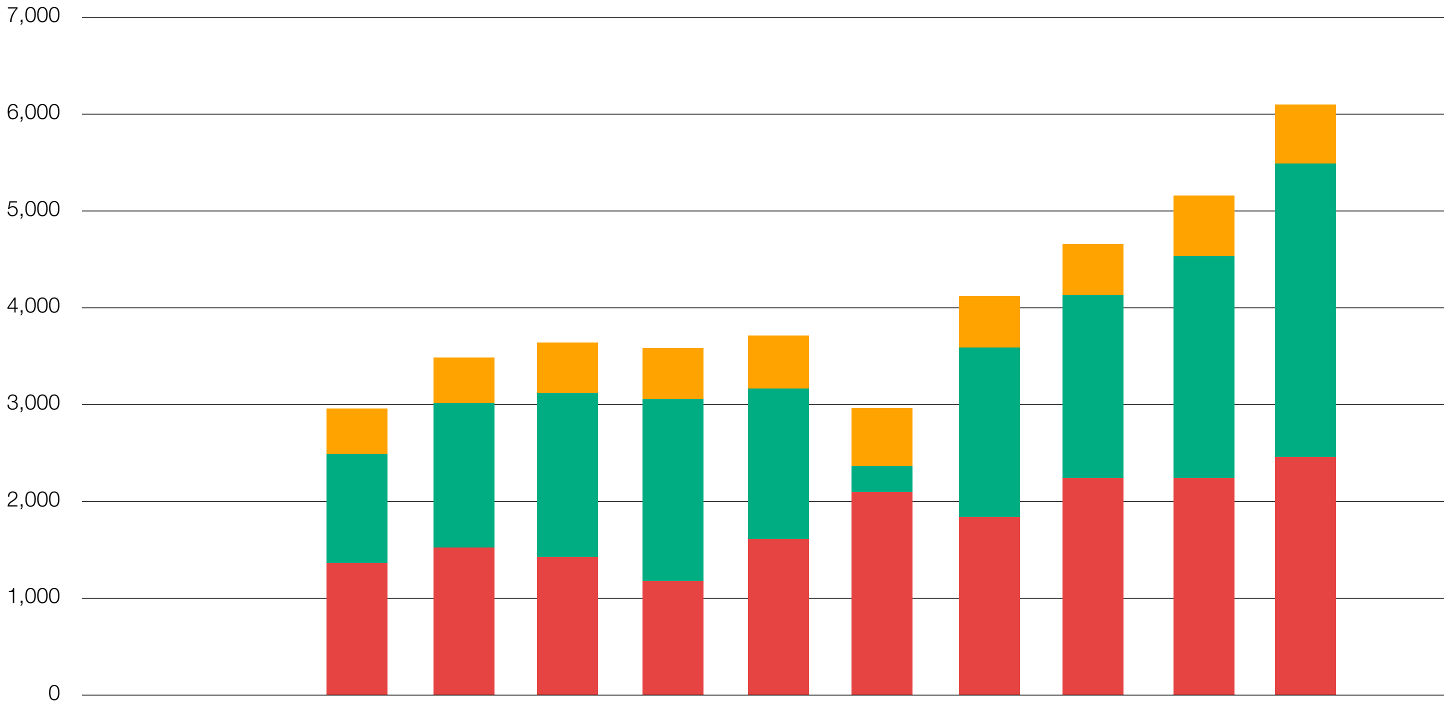
	Film production	Post production	Film distribution	Film exhibition
2012	874	946	249	567
2013	797	729	1,658	511
2014	938	927	1,670	513
2015	1,089	881	2,279	615
2016	1,366	935	2,980	609

Source: Office for National Statistics Annual Business Survey

See note to Table 2.

Figure 6 shows the industry's value added expressed in real terms, ie with the effects of inflation removed. For the four years 2008 to 2011, real GVA was around £3.5 billion (in 2016 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 2016 was 106% higher than its value in 2007.

Figure 6 UK film industry real gross value added, 2007-2016



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2007-2016
Film and video production (including post-production)	1,365	1,522	1,425	1,178	1,612	2,098	1,840	2,240	2,243	2,460	80.3
Film and video distribution	1,124	1,494	1,695	1,877	1,555	264	1,750	1,893	2,290	3,029	169.5
Film exhibition	470	471	521	531	545	602	532	525	627	609	29.6
Total	**2,959**	**3,486**	**3,640**	**3,586**	**3,712**	**2,965**	**4,123**	**4,659**	**5,161**	**6,098**	**106.1**

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-march-2018-quarterly-national-accounts.

Values expressed in constant 2016 pounds.

For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the four-digit class total (5913) minus TV distribution (59133).

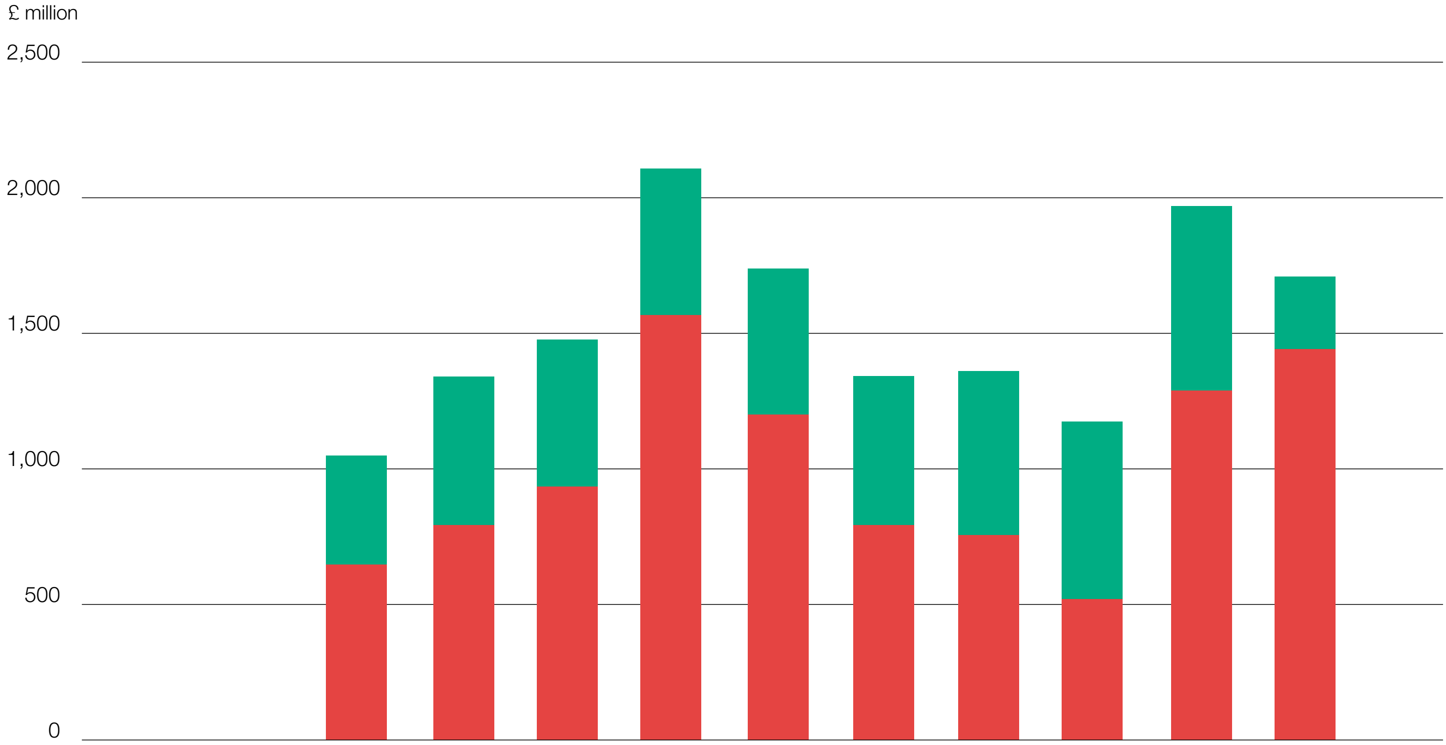
For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

FILM EXPORTS, 2007-2016

The UK film industry generated exports of £1.7 billion in 2016 (the latest year for which data are available), of which £1.4 billion (84%) comprised royalties earned overseas from the exploitation of UK intellectual property and £0.3 billion (16%) comprised the sale of UK-based audiovisual and related services to foreign investors (Figure 7).

While the export value of audiovisual and related services remained fairly constant for most of the 10-year period 2007-2016, it fell sharply (-60%) between 2015 and 2016. The value of exports of intellectual property, however, which has shown greater variability over the decade, increased by 12% between 2015 and 2016. Although down from 2015, overall film exports in 2016 were 63% higher than in 2007, and were the fourth highest of the period.

Figure 7 UK film industry exports, 2007-2016



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2007-2016
Intellectual property	646	792	935	1,566	1,199	792	756	519	1,289	1,441	123.1
Audio visual and related services	403	549	541	541	540	550	605	655	679	269	-33.3
Total	**1,049**	**1,341**	**1,476**	**2,106**	**1,739**	**1,342**	**1,361**	**1,174**	**1,968**	**1,710**	**63.0**

Source: Office for National Statistics Annual Survey of International Trade in Services

Notes:

Data for 2017 are expected to be available at the end of January 2019.

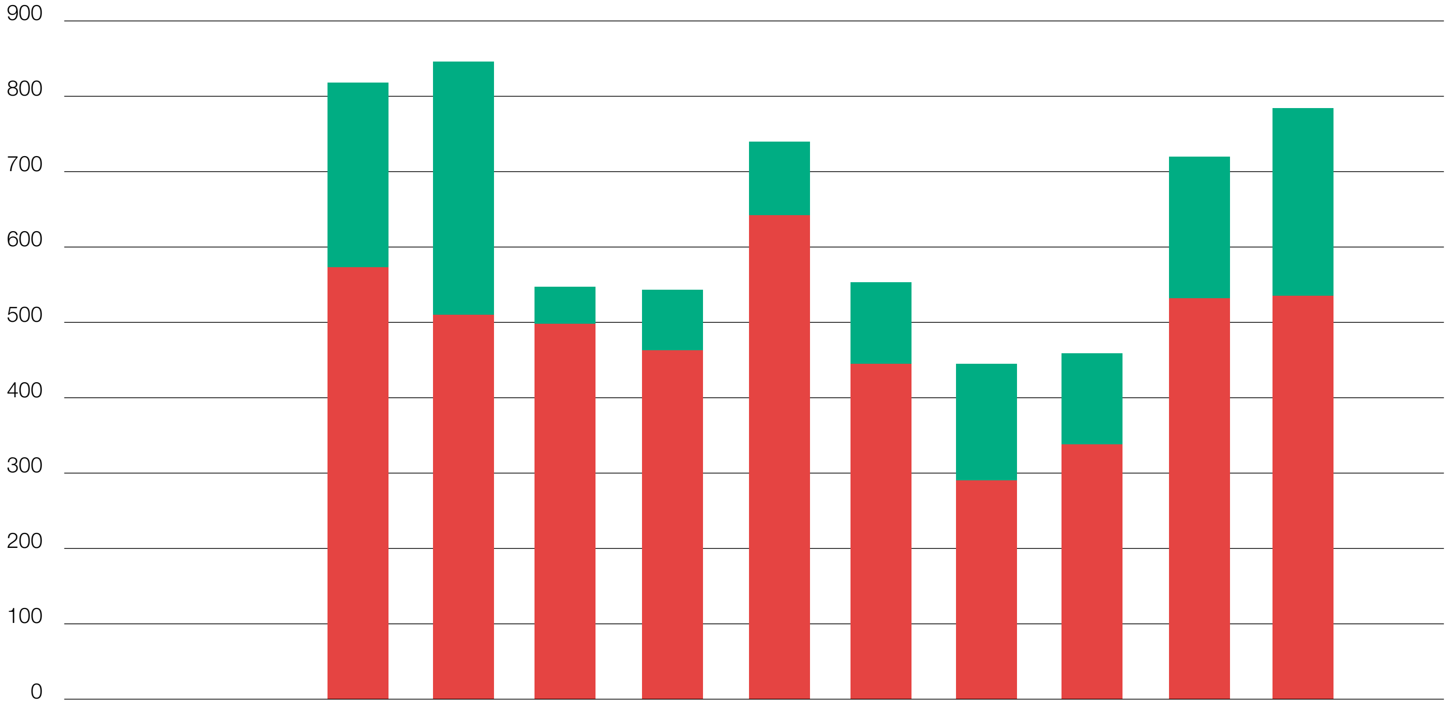
This chart shows the results for film companies only. Import and export data for 2007 and 2008 are derived from the Office for National Statistics (ONS) Film and Television Survey which was a sample survey with a high response rate (87%) of companies in the Inter-Departmental Business Register in the SIC codes relating to film and television. This survey was discontinued and film and television data for 2009 and later were collected in the ONS Annual Survey of International Trade in Services.

FILM IMPORTS, 2007-2016

The UK film industry imported £784 million worth of services in 2016, of which £535 million (68%) comprised intellectual property and £249 million (32%) comprised audiovisual and related services.

As Figure 8 shows, the pattern of UK film imports is different to that of exports. In most years between 2007 and 2016, intellectual property made up the vast majority of imports with audiovisual and related services accounting for only around 15-20% of the total. However, the share for services was 30% or above in 2007, 2013 and 2016 and as high 40% in 2008. The reasons for the increased share in these years are unclear as the reported level of imports for services is relatively high in relation to total UK film production for these years. One possible explanation could be the categorisation of the non-UK spend of UK/USA inward investment productions as imports of services by the UK subsidiaries of major US studios. However, this explanation cannot be confirmed as the survey returns are confidential.

Figure 8 UK film industry imports, 2007-2016



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2007-2016
Intellectual property	573	510	498	463	642	445	290	338	532	535	-6.6
Audio visual and related services	245	336	49	80	98	108	155	121	188	249	1.6
Total	**818**	**846**	**547**	**543**	**740**	**553**	**445**	**459**	**720**	**784**	**-4.2**

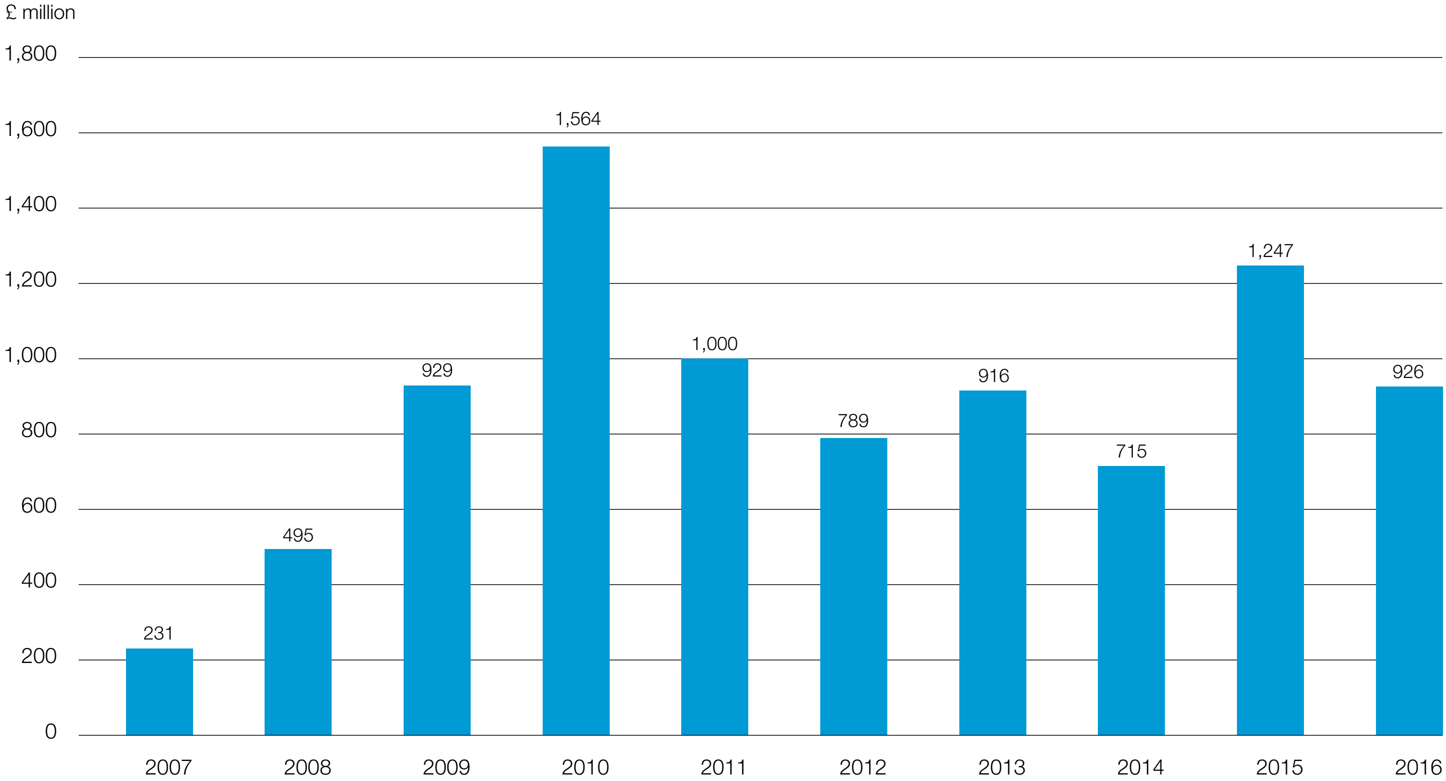
Source: Office for National Statistics Annual Survey of International Trade in Services

See notes to Figure 7.

THE FILM TRADE BALANCE, 2007-2016

The film industry has made a continuous positive contribution to the UK balance of payments since 2007, as Figure 9 shows. The trade surplus (positive balance of exports over imports) in 2016 was £926 million, the fifth highest recorded surplus of the 10-year period.

Figure 9 Trade surplus of UK film industry, 2007-2016



Source: Office for National Statistics Annual Survey of International Trade in Services

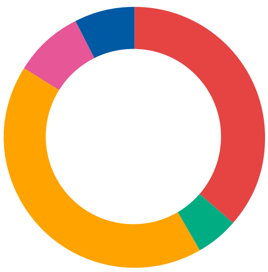
Note: 'Trade surplus' equals exports minus imports. Where a company (eg the UK subsidiary of a US major) receives income from another country on behalf of its parent company and subsequently passes it on to its parent company, this is recorded both as a receipt and a payment, leaving the measure of the trade surplus unaffected.

FILM EXPORT MARKETS

Figure 10 shows the geographical distribution of UK film exports for the years 2012-2016. The USA was the primary export destination for UK film in the period with a 42% share of exports compared with the EU's 36%. However, Europe as a whole accounted for a similar proportion of UK film exports to that of the USA. Asia's share of exports was 9%, a significant rise on the 7% recorded for the previous five-year period (2011-2015).

Figure 10 Destination of UK film exports as percentage of the total, 2012-2016

	%
EU	36.4
Other Europe	5.3
USA	42.2
Asia	8.6
Rest of the world	7.4



Source: Office for National Statistics Annual Survey of International Trade in Services

Note: 'Other Europe' and 'Rest of the world' cannot be disaggregated due to sampling variation and disclosive data.

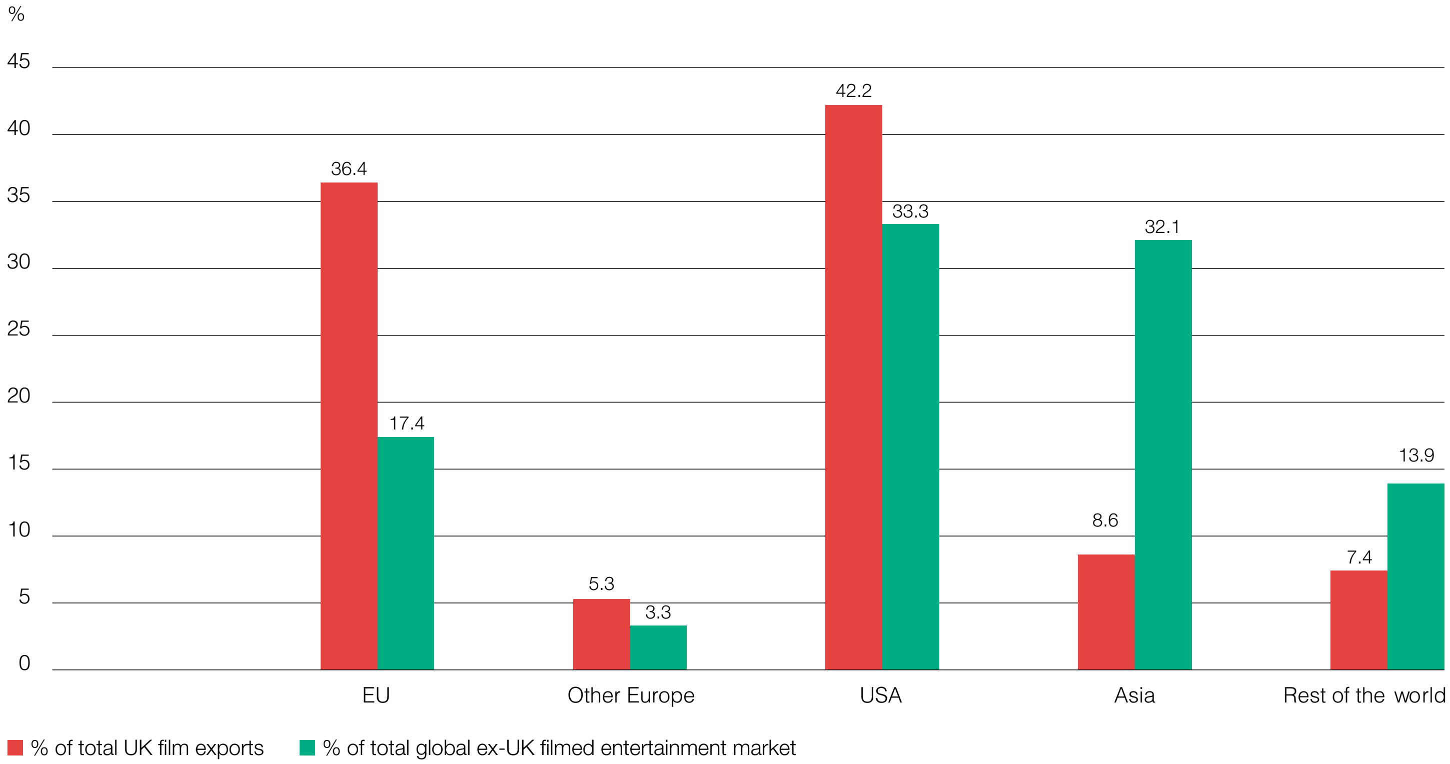
UK FILM EXPORTS COMPARED WITH THE GLOBAL MARKET FOR FILMED ENTERTAINMENT

A useful comparison can be made between UK film export shares and the geographical distribution of the global market for filmed entertainment (Figure 11). For the EU, USA and 'other Europe' the shares of UK exports in the period 2012-2016 were higher than the shares of the ex-UK global filmed entertainment market in each of those regions, whereas the reverse was true for Asia and 'rest of the world'. The differences that stand out are:

- The higher proportion of UK exports to Europe (36% of the UK's film exports were to the EU compared with the EU's 17% share of the ex-UK global filmed entertainment market, and 5% of film exports were to 'other Europe' compared with a 3% ex-UK global market share);
- The lower proportion of UK exports to Asia (9%) compared with the Asian countries' share of the ex-UK global market (32%).

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, 2012-2016, compared with the ex-UK global market for filmed entertainment, 2016



Source: Office for National Statistics Annual Survey of International Trade in Services, PwC, *Global Entertainment and Media Outlook 2018-2022*, www.pwc.com/outlook

THE GEOGRAPHICAL DISTRIBUTION OF THE UK'S FILM TRADE SURPLUS

The geographical distribution of the UK's film trade surplus showed a similar pattern to that of exports, except that there was a trade deficit, amounting to 3% of the film trade balance, with 'rest of the world', as shown in Table 3. The UK ran large film trade surpluses with the USA in the years 2012-2016. During the period, the USA accounted for 54% of the UK's film trade surplus, while EU countries accounted for 37% of the surplus.

Table 3 International transactions of the UK film industry by geographical area, annual average, 2012-2016

	Exports (£ million)	Imports (£ million)	Balance (£ million)	% balance
EU	550.3	214.5	335.8	36.6
Other Europe	79.3	34.3	45.1	4.9
USA	638.3	142.5	495.8	54.0
Asia	130.3	59.8	70.5	7.7
Rest of the world	112.5	141.1	-28.6	-3.1
Total	**1,510.8**	**592.3**	**918.5**	**100.0**

Source: Office for National Statistics Annual Survey of International Trade in Services
Note: Figures/percentages may not sum to totals/subtotals due to rounding.

Image: *McQueen* ©Ann Ray courtesy of Lionsgate Films

FILM INDUSTRY COMPANIES 2013-2017

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 above, which are based on the ONS's Annual Business Survey (ABS). The ABS collects data from a sample of businesses across the UK, whereas the IDBR is a comprehensive list of businesses in the UK, compiled by combining several data sources, including VAT and PAYE data from HMRC as well as data from other business surveys conducted by the ONS. The differences between the estimates are due to variances in the sources, sample size and the time periods during which the data are collected. The estimates derived from the ABS are National Statistics and considered by the ONS to be the more robust data. These estimates tend to value down turnover compared to the IDBR.

NUMBER OF COMPANIES IN THE FILM INDUSTRY

The number of companies involved in the film industry increased by 48% between 2013 and 2017, compared to the UK all-industries average of 23% (Table 4). The majority of the growth is the result of an expansion in the number of companies working in the production sector: the number of video production companies increased by 78% while there was a 49% 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 2017, there were 8,115 film production companies, 2,965 film, video and TV post-production companies, 395 film distribution companies and 255 film exhibition companies.

Table 4 Number of companies by sub-sector, 2013-2017

Sub-sector	2013	2014	2015	2016	2017	Growth 2013-2017 (%)
Film production	5,450	6,090	6,805	7,420	8,115	48.9
Video production	1,905	2,200	2,545	2,980	3,390	78.0
Film, video and TV post-production*	2,240	2,465	2,660	2,870	2,965	32.4
Film distribution	395	405	420	380	395	-
Video distribution	75	80	85	75	80	6.7
Film exhibition	215	215	230	255	255	18.6
Total	**10,280**	**11,455**	**12,745**	**13,980**	**15,200**	**47.9**
UK all industries	**2,167,580**	**2,263,645**	**2,449,415**	**2,554,510**	**2,668,810**	**23.1**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2017.

* 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.

In 2017, the turnover of film production companies was £4.5 billion, an increase of 63% compared with 2013, film, video and TV post-production company turnover was £1.8 billion, an increase of 25.5% on 2013, and film exhibition company turnover was £1.6 billion, an increase of 26% on 2013. Overall, the turnover of film industry companies increased by 80% between 2013 and 2017 (Table 5).

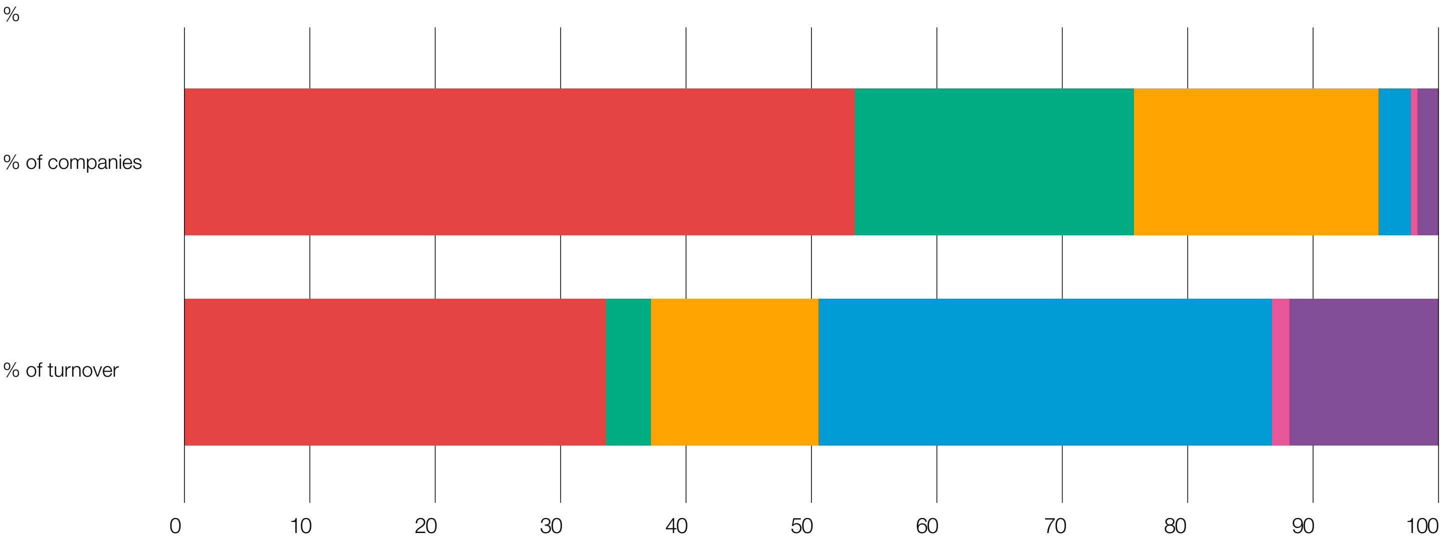
Table 5 Turnover of companies by sub-sector, £ million, 2013-2017

Sub-sector	2013	2014	2015	2016	2017	Growth 2013-2017 (%)
Film production	2,760.2	2,968.1	2,967.3	3,833.1	4,509.4	63.4
Video production	263.0	301.6	357.1	397.6	477.4	81.5
Film, video and TV post-production	1,434.9	1,389.3	1,477.6	1,309.1	1,800.6	25.5
Film distribution	1,579.2	2,976.4	2,776.2	4,306.2	4,871.3	208.5
Video distribution	180.0	214.1	187.7	233.5	190.8	6.0
Film exhibition	1,261.7	1,275.6	1,339.3	1,405.0	1,593.1	26.3
Total	**7,479.0**	**9,125.1**	**9,105.2**	**11,484.4**	**13,442.6**	**79.7**

Source: Office for National Statistics Inter-Departmental Business Register
See notes to Table 4.

Film distributors represented 3% of film industry companies in 2017 but accounted for 36% of overall 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 53% of companies and just over one third of total turnover.

Figure 12 Percentage of film and video companies and turnover by sub-sector, 2017



Film production	53.4	33.5
Video production	22.3	3.6
Film, video and TV post-production	19.5	13.4
Film distribution	2.6	36.2
Video distribution	0.5	1.4
Film exhibition	1.7	11.9

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 2017 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, 2017

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	165	2.0	2,723.5	60.4
1.0-4.99	400	4.9	804.4	17.8
0.5-0.99	335	4.1	220.1	4.9
0.25-0.49	580	7.1	196.1	4.3
0.1-0.24	2,445	30.1	352.5	7.8
0.05-0.09	2,370	29.2	172.4	3.8
<0.05	1,820	22.4	40.4	0.9
Total	**8,115**	**100.0**	**4,509.4**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2017.
Percentages may not sum to 100 due to rounding.

Table 7 Size distribution of post-production companies, 2017

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	45	1.5	1,250.1	69.4
1.0-4.99	110	3.7	215.0	11.9
0.5-0.99	120	4.0	82.4	4.6
0.25-0.49	145	4.9	49.8	2.8
0.1-0.24	845	28.5	112.3	6.2
0.05-0.09	1,020	34.4	73.1	4.1
<0.05	680	22.9	18.0	1.0
Total	**2,965**	**100.0**	**1,800.6**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2017.
Figures/percentages may not sum to totals due to rounding.

Table 8 Size distribution of film distribution companies, 2017

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	40	10.1	4,743.5	97.4
1.0-4.99	30	7.6	67.8	1.4
0.5-0.99	40	10.1	27.4	0.6
0.25-0.49	35	8.9	c	c
0.1-0.24	90	22.8	13.1	0.3
0.05-0.09	75	19.0	c	c
<0.05	85	21.5	1.4	<0.1
Total	**395**	**100.0**	**4,871.3**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2017.
'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, 2017

Turnover size band (£ million)	Number	%	Turnover (£ million)	%
≥5.0	15	5.9	1,451.4	91.1
1.0-4.99	45	17.6	94.6	5.9
0.5-0.99	30	11.8	22.5	1.4
0.25-0.49	35	13.7	12.7	0.8
0.1-0.24	60	23.5	8.7	0.5
0.05-0.09	35	13.7	2.5	0.2
<0.05	35	13.7	0.7	<0.1
Total	**255**	**100.0**	**1,593.1**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register
Notes:
Data as at March 2017.
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 2017. Overall, 70% of film companies were concentrated in London and the South East, and 85% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (58% of companies and 98% of turnover) but the exhibition sector was more widely spread across the UK, with 72% of companies and 45% 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, 2017

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
England	7,670	94.5	2,805	94.6	375	94.9	220	86.3	11,070	94.4
London	4,435	54.7	1,500	50.6	230	58.2	70	27.5	6,235	53.2
South East	1,300	16.0	545	18.4	65	16.5	40	15.7	1,950	16.6
East	610	7.5	220	7.4	25	6.3	20	7.8	875	7.5
South West	450	5.5	205	6.9	15	3.8	25	9.8	695	5.9
North West	270	3.3	120	4.0	15	3.8	20	7.8	425	3.6
Yorkshire and The Humber	215	2.6	65	2.2	5	1.3	15	5.9	300	2.6
West Midlands	170	2.1	70	2.4	15	3.8	10	3.9	265	2.3
East Midlands	145	1.8	55	1.9	5	1.3	15	5.9	220	1.9
North East	75	0.9	25	0.8	0	-	5	2.0	105	0.9
Scotland	210	2.6	90	3.0	5	1.3	15	5.9	320	2.7
Wales	170	2.1	50	1.7	10	2.5	10	3.9	240	2.0
Northern Ireland	65	0.8	20	0.7	5	1.3	10	3.9	100	0.9
UK	**8,115**	**100.0**	**2,965**	**100.0**	**395**	**100.0**	**255**	**100.0**	**11,730**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Notes:

Data as at March 2017.

The overall total differs from that in Table 4 as it excludes figures for video production and distribution.

Percentages may not sum to 100 due to rounding.

Table 11 National/regional distribution of film company turnover, 2017

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£m)	%	Turnover (£m)	%	Turnover (£m)	%	Turnover (£m)	%	Turnover (£m)	%
England	c	c	1,767.7	98.2	4,865.3	99.9	1,522.1	95.5	c	c
London	2,989.7	66.3	1,523.6	84.6	4,767.3	97.9	880.3	55.3	10,160.8	79.5
South East	345.9	7.7	106.4	5.9	23.4	0.5	27.6	1.7	503.4	5.5
East	565.0	12.5	37.3	2.1	42.9	0.9	56.8	3.6	702.1	3.9
South West	172.0	3.8	35.8	2.0	8.9	0.2	25.1	1.6	241.7	1.9
North West	65.2	1.4	c	c	c	c	c	c	c	c
Yorkshire and The Humber	72.0	1.6	c	c	9.5	0.2	c	c	c	c
West Midlands	23.1	0.5	9.3	0.5	c	c	2	0.1	c	c
East Midlands	24.2	0.5	c	c	c	c	106.0	6.7	c	c
North East	c	c	2.6	0.1	c	c	c	c	c	c
Scotland	43.2	1.0	c	c	c	c	c	c	c	c
Wales	42.8	0.9	18.8	1.0	1.4	<0.1	5.7	0.4	0.1	<0.1
Northern Ireland	c	c	c	c	c	c	33.8	2.1	c	c
UK	**4,509.4**	**100.0**	**1,800.6**	**100.0**	**4,871.3**	**100.0**	**1,593.1**	**100.0**	**12,774.4**	**100.0**

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

Notes:

Data as at March 2017.

'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

The geographical 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.

LEADING FILM PRODUCTION COMPANIES IN THE UK

Drawing on the BFI Research and Statistics Unit's production database and public information, Table 12 presents the production companies involved in the greatest number of UK feature film projects between 2015 and 2017. Goldfinch Studios (a merger of Goldfinch Entertainment and GSP Studios) tops the list with 15 films followed by Scott Free Productions with 11 and Salon Pictures with 10. The 11 films produced by Scott Free Productions had the highest combined budget at £312 million (equivalent to a mean budget per film of £28 million). Working Title Films had the next highest combined budget at £299 million over nine films (a mean budget of £33 million). North Bank Entertainment produced six films, but had the lowest combined budget at £230,000.

Table 12 Production companies involved in five or more UK productions, ranked by number of films, 2015-2017

Production company	Number of films	Estimated combined budget (£ million)	Selected titles
Goldfinch Studios	15	51	The Bet; Bliss!; Property of the State
Scott Free Productions	11	312	Alien: Covenant; All the Money in the World; Murder on the Orient Express
Salon Pictures	10	6	Churchill; The Guv'nor; McQueen
Working Title Films	9	299	Darkest Hour; Mary Queen of Scots; Victoria & Abdul
Tornado Films	8	11	King Arthur: Excalibur Rising; The Rebels; Viking Legacy
Passion Pictures	8	10	Eric Clapton: Life in 12 Bars; George Best: All by Himself; My Africa
Pulse Films	7	7	American Honey; One More Time with Feeling; XY Chelsea
Fulwell 73	7	5	After the Screaming Stops; I Am Bolt; Mo Farah: No Easy Mile
Reliance Entertainment/Motion Picture Capital	6	21	1921; The Crucifixion; Hampstead
Greenway Entertainment	6	0.2	The Doll Master; I Am Hooligan; Invasion Earth
North Bank Entertainment	6	0.2	Cabin 28; The Curse of Robert the Doll; Kill Kane
Element Pictures	5	39	Disobedience; The Killing of a Sacred Deer; The Little Stranger
Pot Boiler Productions	5	32	The Boy Who Harnessed the Wind; Final Portrait; Woman Walks Ahead
Sixteen Films	5	19	City of Tiny Lights; I, Daniel Blake; You Were Never Really Here
Fine Point Films	5	3	Bobby Sands: 66 Days; George Best: All by Himself; No Stone Unturned

Source: BFI

Notes:

Companies ranked by number of films produced, then by estimated combined budget.

'Estimated combined budget' is the sum of the estimated budgets of all the films associated with the named company. It is not a measure of that company's contribution to the budget. Most films had a number of production companies associated with them and financing came from a variety of sources including National Lottery funding, UK film tax relief, equity investment, US studio investment, distributor minimum guarantees and television pre-sales.

The table includes companies associated with five or more films over the three-year period.

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 a production must qualify as British under the relevant cultural test or as an official co-production, it must be intended for broadcast on television and/or the internet, and at least 51% of its total core expenditure must be on animation

Audiovisual and related services
Within the exports data provided by the ONS audiovisual and related services describe services and fees related to the production of motion pictures, radio and television programmes and musical recordings

BAFTA
British Academy of Film and Television Arts (www.bafta.org)

BARB
Broadcasters' Audience Research Board. The company 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 of cinema advertising contractors operating in the UK and Republic of Ireland (www.cinemaadvertisingassociation.com)

Cash-in
A notification to an Examining Board that all units of a qualification (eg GCSE) have been completed and an overall grade should now be awarded

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 a 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, ie using electronic signals to direct light onto the screen rather than passing light through a celluloid strip

Digital video
A term used by the BFI Research and Statistics Unit to describe Video on Demand (VoD), a system that allows users to stream or download a film from a digital platform to view on a television set, PC or mobile device. See Video on Demand

Distributor
A person or company that acquires the right to exploit the commercial and creative values of a film in the theatrical, video and television markets. Also undertakes the promotional and marketing activities to attract audiences to a film

Domestic box office
Typically refers to the USA and Canada box office and revenue from the films given theatrical release in this territory. See Local box office

Domestic UK feature
A domestic (indigenous) UK feature is a film made by a UK production company that is produced wholly or partly in the UK, where the majority of the film's budget is from UK sources

Download to Own (DTO)
A type of Video on Demand business model which allows users to purchase permanent film downloads for storage on a hard drive, and in some cases to burn an additional copy to DVD. Also known as Electronic Sell Through (EST)

Download to Rent (DTR)
A type of Video on Demand business model which allows users to download content to view within a limited time period (often up to 48 hours following the first play)

DVD – Digital versatile disc
A digital optimal disc storage format capable of being viewed on different types of players

EEA spend
The value of all production expenditure, from pre-production to completion, on activity incurred in the European Economic Area

Electronic Sell Through (EST)
See Download to Own (DTO)

English Regions
Formerly known as Government Office Regions (GORs) they were an administrative classification used to establish the boundaries of the Regional Development Agencies and the Regional Screen Agencies. In 2011 the administrative function of GORs was abolished but the areas were kept for statistical purposes and are now known just as 'Regions'

Event cinema
Also known as 'alternative content'. Non-feature film programming in cinemas, such as the live screening of events or performances happening elsewhere. Event cinema has become a regular feature of some UK cinemas in recent years, and has been made possible by the availability of digital projection

Exhibitor
A cinema operator that rents a film from a distributor to show to a cinema audience. See Film rental

Feature film
A film made for cinema release, rather than a film made for television, and usually of at least 80 minutes duration

Film download
A digital version of a film transferred (either officially or unofficially) from the internet to a personal computer or mobile device. Downloads may also go directly to television sets via games consoles, internet protocol television or dedicated set-top boxes

Film rental
The sum of money paid to the distributor by the exhibitor in return for the right to show a particular film. Usually calculated as a percentage of net box office

Film tax relief

Tax relief on film production costs available for British qualifying films. To access the relief a film must qualify as British under the relevant cultural test or as an official co-production, with the intention of being released for theatrical exhibition

Franchise

A film series such as Harry Potter and the Philosopher's Stone and its sequels

GCE – General Certificate of Education

A subject specific academic qualification comprising Advanced Level (A Level) and Advanced Subsidiary Level (AS Level) available principally in England, Wales and Northern Ireland

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 Standard Grade)

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 (eg action, crime, drama, etc)

Global box office

See worldwide box office

Grant-in-aid

A payment by a public sector funder (normally a central government department) to finance all or part of the costs of the body in receipt of the grant-in-aid. Grant-in-aid is paid where the government has decided, subject to parliamentary controls, that the recipient body should operate at arm's length

GVA – Gross Value Added

The amount that individual businesses, industries or sectors contribute to the economy. Broadly, this is measured by the income generated by the business, industry or sector less their intermediate consumption of goods and services used in order to produce their output. GVA consists of labour costs (for example, wages and salaries) and an operating surplus (or loss). The latter is a good approximation to profits. The cost of capital investment, financial charges and dividends to shareholders are met from the operating surplus

High-end television (HETV) programme

Within this Yearbook, the high-end television programmes referred to are those which have accessed or intend to access the relevant UK creative industry tax relief. To access the relief a production must qualify as British under the relevant cultural test or as an official co-production, it is a drama (which includes comedy) or documentary production that must be intended for broadcast on television and/or the internet and have an average core expenditure per hour of slot length of not less than £1 million. (The slot length in relation to HETV programmes must be greater than 30 minutes)

Higher (Scottish)

In Scotland, the Higher is one of the national school-leaving certificate exams and university entrance qualifications of the Scottish Qualifications Certificate offered by the Scottish Qualifications Authority

HMRC

Her Majesty's Revenue and Customs. The government department charged with collecting revenue on behalf of the Crown

HMT

Her Majesty's Treasury. The government department responsible for formulating and implementing the Government's financial and economic policy

Independent film

A film produced without creative or financial input from the major US studio companies. These are: Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Intellectual property

Within the exports data provided by the ONS intellectual property includes trade marks, franchises, brands and design rights; copyrighted works, sound recordings, films, television programmes; and royalties

Intermediate (Scottish)

In Scotland, the Intermediate was one of the national secondary school certificate qualifications offered by the Scottish Qualifications Authority. These have been replaced by National Qualifications

Inward investment feature
A term used by the BFI Research and Statistics Unit to denote a feature film which is substantially financed and controlled from outside the UK and which is attracted to the UK by script requirements (eg locations) and/or the UK's filmmaking infrastructure and/or UK film tax relief

ISBA TV regions
System for classifying regions developed by the Incorporated Society of British Advertisers for use by the advertising industry (www.isba.org.uk)

Local box office
Typically describes a particular country or territory's box office and revenue from films given a theatrical release in that country or territory when referenced from the perspective of that country or territory. See Domestic box office

Mainstream programming
Category of films aimed at the general audience

Mbps
Megabits per second. A data transfer rate of one million bits per second

Mean
A statistical term for the average of a set of values, which is calculated by summing the values and then dividing by the count of the values

Median
A statistical term meaning the middle value in an ordered set of values. Half of the values fall below the median, and half of the values fall above the median

Mixed-use venue
An arts venue which screens films on a part-time basis alongside other activities such as concerts and plays

Megaplex site
Defined by Dodona Research as a purpose-built cinema with 20 or more screens

Multiplex site
Defined by Dodona Research as a purpose-built cinema with five or more screens

Multi-channel television
Digital television programming carried by satellite, cable or freeview delivery systems, in this case excluding the five main network channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5)

National Qualifications (Scottish)
In Scotland, National Qualifications are one of the secondary school certificate exams offered by the Scottish Qualifications Authority. These have replaced Intermediate and Standard Grade certificate qualifications. National Qualifications are usually taken by learners in the senior phase of secondary school (S4 to S6) and learners in colleges, including adult learners

Net box office
Box office takings after deduction of VAT

Online DVD rental
Selecting and renting DVDs via a website for postal delivery

ONS
Office for National Statistics. Executive office of the UK Statistics Authority, responsible for the production of official statistics in the UK (www.ons.gov.uk)

Over the top (OTT)
Over the top describes streamed or downloaded media content delivered via the internet without the involvement of a multiple-system operator

Out of town cinema
Cinema located on the outskirts of a town, typically in a large shopping development

PAYE
Pay as you earn. A method of collecting income tax and national insurance where these are deducted at source by the employer and remitted to HMRC

Pay TV
A satellite or cable television system in which viewers pay a subscription to access television content including feature films

Physical video
Refers to the various physical formats on which video can be distributed, such as VHS, DVD, Blu-ray, etc

Post-production
All stages of film production occurring after the shooting of raw footage. These typically include: editing the picture, adding the soundtrack, adding visual special effects and sound effects and preparing a final cut

Principal photography

The phase of film production in which the movie is filmed, with actors on set and cameras rolling, as distinct from pre-production and post-production

Pre-production

All stages of film production occurring once a film has been greenlit and before the shooting of raw footage. This typically includes: recruitment of crew, location scouting, set construction and scheduling

Producer

A film producer oversees and delivers a film project to all relevant parties while 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

South Asian films

Films originating from South Asia, for example Bollywood, and generally, though not exclusively, aimed at a South Asian audience and in a South Asian language

Specialised films

Generally, non-mainstream films. This category includes foreign language and subtitled films, feature documentaries, '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: Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment

Subscription VoD (SVoD)

A type of Video on Demand business model based on a subscription payment (usually monthly) in return for unlimited access to content

Terrestrial television

The five main free-to-air channels: BBC One, BBC Two, ITV, Channel 4 and Channel 5

Traditional cinema

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

Virtual Print Fee (VPF)

The commercial joint funding model designed to help film exhibitors purchase digital cinema equipment. The VPF is a contribution towards exhibitors' costs of digital cinema equipment, paid by distributors. This is based on the assumption that distributors will benefit from cost savings associated with using digital print distribution instead of analogue film print distribution

Worldwide box office

Refers to the box office across all global territories and total global box office revenues. Within the Yearbook, worldwide box office is used interchangeably with global box office

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