Film
Forever

STATISTICAL YEARBOOK 2014

Welcome to the 2014 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 2013. 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.

Contents

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 and distribution, its cultural programmes, 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 Greg Dyke.

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Chief Executive’s foreword

As I write this foreword, the Government is shining a spotlight on the UK’s creative industries, celebrating their global success, far reaching impact and the positive contribution they make to our economy. The forward vision for the creative industries is one of growth, establishing an environment in which skills and innovation can thrive, and using the assets and competitive edge of British creativity to attract inward investment and seek out new markets internationally. Film is recognised as being at the very heart of this strategic focus as it brings together world-class writing, design, acting, music and technical skills with the other essential ingredients of artistic vision and production in a unique collaboration of creativity across different disciplines.

But this strategy also highlights the need for robust data and evidence-based research which is so critical for those making informed decisions and developing their plans for growth. The BFI Statistical Yearbook brings together all the leading data and industry research available to give the clearest possible picture of the film landscape so the investment we make in the vital analysis of the Research and Statistics Unit is invaluable. But we believe the picture we get from the Yearbook could be sharper and more informative if there were better data, particularly on Video on Demand. This is why we are calling on the sector to be more open with its data so that film and the screen industries as a whole can continue to thrive and grow, and audiences continue to enjoy great films.

Amanda Nevill
Chief Executive, BFI

UK films’ share
of the global box office

11%

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

2013 – the year in review

The importance of the UK as a global centre of production for the screen industries was confirmed in 2013 with an increase in international production activity. The success of the film tax relief in driving inward investment and economic growth was further recognised by the government when new reliefs were introduced for high-end television and animation.

The UK film industry is a valuable part of the British economy and has doubled its GDP in the past 20 years in real terms, contributing £2.9 billion in 2012. In the same year, the industry exported £1.3 billion worth of services generating a trade surplus of £789 million. The current expansion of UK infrastructure to meet rising demand at studios such as Pinewood and Leavesden, and the investment in Twickenham which celebrated its centenary in 2013, will create further opportunities for UK talent.

In the international market in 2013, UK films earned just over 11% of global box office receipts ($4.1 billion). *Fast & Furious 6* was the top grossing UK film worldwide with earnings of $788 million, while *Red 2* was the top grossing independent UK film with earnings of $142 million. Data became available for the first time on the performance of British films in China and Russia, showing UK films had a market share of 8% and 12% respectively, earning $266 million and 5,203 million rubles ($164 million).

The UK remains the third largest consumer market for filmed entertainment in the world, and is predicted to overtake Japan by 2018. In 2013, it generated revenues in excess of £4 billion.

At the UK box office, in 2013 revenues exceeded £1 billion for the third year in succession, based on 165.5 million cinema admissions. Some 698 films were released at the cinema for a week or more, an increase of 51 (7%) on 2012. The highest earning film of the year was *Despicable Me 2* which grossed over £47 million. Key UK successes at the box office were *Les Misérables* (£41 million), *Gravity* (£31 million) and *Fast & Furious 6* (£25 million). The top UK independent films at the box office were *Philomena* (£11 million) and *Rush* (£10 million).

For the first time, animation was the UK's favourite genre grossing 21% of box office receipts from 5% of releases, while action was the top genre for UK films. A total of 446 specialised films were released in the UK in 2013, earning almost £110 million (9.5% of the box office). Forty per cent of these were foreign language films, the highest earning of which was a Hindi film, *Dhoom: 3*, which grossed £2.7 million. *Dhoom: 3* became the first Indian language film to appear in the list of all time top 10 foreign language films at the UK box office, and was the first new entry in the chart since 2007.

Data from 2013 revealed once again that UK films appeal to all demographic groups, and that this increases with age. From the releases of *One Direction: This Is Us* where half the audience was aged 7-14, to *Quartet*, where 87% of the audience was aged 55 and over, successful UK films were well-targeted at individual age groups.

Turning to other platforms, in 2013 there were over 3.4 billion viewings of films on television while the estimated value of feature film to UK broadcasters increased from approximately £1.5 billion to £1.6 billion. Another animated film *Up* was the year's most popular film on television attracting an audience of 7.9 million viewers (12% of the UK population) to BBC One on New Year's Day. The most popular independent UK film was *The King's Speech*, which aired on Channel 4, with 2.9 million viewers.

2013 was a turning point for the growth of the UK digital video market as a whole, where for the first time in recent years the combined physical video and Video on Demand market increased in value, but this did not apply to film. The film video market decreased slightly but by a smaller amount than previous years, and the signs are that 2014 will be the year that the digital film video market grows.

Feature film video sales and rentals in the UK generated just over £1.1 billion in 2013, while film revenues from on-demand services reached £323 million. The value of on-demand services grew by 37% compared with 2012 to account for 8% of total film revenues. Although aggregate estimates of this market point to significant growth, our

UK cinema admissions

165.5m

UK box office

£1.1bn

understanding remains hampered by a lack of robust UK data. Some limited data are provided by Ofcom, but the UK market is being held back by the absence of data about subscribers and downloads, mode of access and audiences – information that benefits the industry in other markets such as Spain.

The strength and depth of UK talent driving the industry was rewarded and showcased to the world at the leading international award ceremonies in 2013/14. UK films and talent won 26 major film awards in 2013/14, including six Oscars® and 13 BAFTAs, with Steve McQueen's *12 Years a Slave* winning the best film award at both ceremonies. This was the first time a film by a black director has won the best picture Oscar®. The success of *Gravity* gave deserved recognition to the UK special effects industry, as it won four BAFTAs and five Academy Awards®, including those for sound and visual effects. The awards for *Gravity* (whose visual effects were produced by the British company Framestore), reflect wider British talent and UK innovation in this area, as seen in the economic data. UK film, video and TV post-production turnover accounts for 22% of total film industry turnover, and has grown by 67% since 2008 to £1.6 billion. Changes to the UK cultural test for film which came into effect in April 2014 will further boost the special effects industry.

The existing film tax relief plays a major role in attracting international productions to the UK and provides vital support for UK independent productions. The value of film production spend in the UK reached £1.1 billion in 2013, up from £994 million in 2012. Three quarters of UK production spend was associated with inward investment features, and sixteen big budget films accounted for 72% of this total, including *Guardians of the Galaxy*, *Heart of the Sea* and *Jupiter Ascending*. Expenditure on independent domestic UK films (such as *Alan Partridge: Alpha Papa* and *Pride*) also increased between 2012 and 2013, from £134 million to £150 million.

In the first full year of the new tax reliefs for the screen industries (April 2013 – March 2014), the UK production spend of British qualifying high-end television productions was £395 million and the UK spend of animation projects was £52 million, 52% of which was associated with inward investment. High-end television productions shot in 2013 included *Game of Thrones 4*, *Outlander* and *24: Live Another Day*, while animations included *Bing Bunny* and *PIP!*. The success of these productions is likely to drive further growth, with the combined high-end television and animation UK production spend already worth 40% of the value of UK film production.

In 2013, public investment in film for education, young people, and lifelong learning increased to £32 million (8% of all public funding for film), up from £20 million in 2012. Into Film, the new organisation aiming to make film an integrated part of education for 5-19 year olds, supported over 8,000 schools' film clubs across the UK to screen and produce films, helping 282,000 children and young people to access film.

Investment in film education and encouraging diversity will help develop talent and broaden the range of stories being told on the big screen. This in turn, is important to the success of initiatives aiming to develop and grow audiences for feature film. Attracting the best talent from across the whole of society will help the UK film industry to continue to thrive and compete on the world stage.

Looking to 2015 we anticipate:

- the turning point for the film video market, as the growth of on-demand services finally outpaces the decline of physical video
- a strong year for production in our screen industries, with a further expected boost from the introduction of a new tax relief for video games
- the impact of the recently published Creative Industries Strategy growing the creative economy, increasing exports and foreign investment.

We hope you find this edition of the Yearbook a useful source of information and we welcome your feedback. (rsu@bfi.org.uk).

Vivienne Avery, **Nick Maine** and **Alex Tosta**
Research and Statistics Unit, British Film Institute

UK production activity

£1.1bn

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Chapter 1

The box office

In 2013, UK box office revenues exceeded £1 billion for the third year in succession, and admissions at 165.5 million, although lower than in 2012, maintained the flat trend which has been apparent since 2002.

FACTS IN FOCUS

UK box office receipts in 2013 were £1,083 million, down 1% on 2012.

UK cinema admissions reached 165.5 million, down 4% on 2012.

698 films were released for a week or more in the UK and Republic of Ireland.

UK films, including co-productions, accounted for 20% of releases and 22% of the market by value.

The box office share of UK independent films was 7%.

The top 100 films earned 91% of the gross box office, very similar to 2012's 92%.

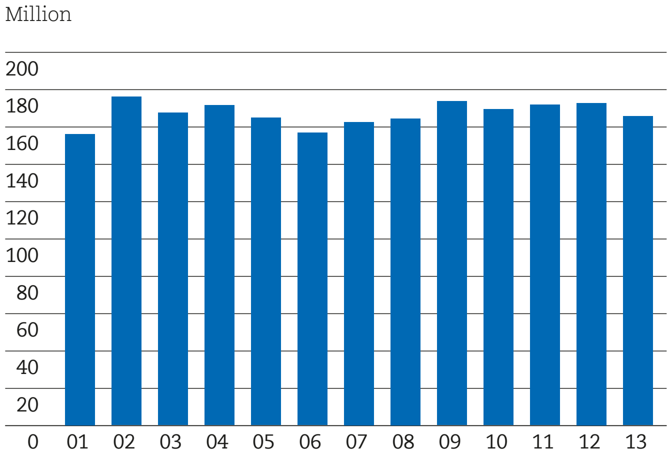
46 3D films were released in 2013, up from 43 in 2012; their 3D takings accounted for 18% of UK and Republic of Ireland box office revenues, the same as in 2012.

UK films made with the backing of major US studios spent longer than other films, on average, in UK cinemas in 2013.

1.1 UK cinema admissions

The 165.5 million cinema tickets sold in the UK in 2013 represented a 4% decline from the number of admissions in 2012. However, UK cinema attendances have remained relatively stable since 2002 (Figure 1.1). It was a mixed picture across other major territories, with some large increases and decreases. Admissions were up in China (16.9%), Italy (6.6%) and Russia (9.2%) but decreased in Australia (-3.4%), France (-5.2%), Germany (-4.0%), Spain (-15.4%) and the USA (-1.1%).

Figure 1.1 Annual UK cinema admissions, 2001-2013



Year	Total admissions (million)
2001	155.9
2002	175.9
2003	167.3
2004	171.3
2005	164.7
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6
2012	172.5
2013	165.5

Source: CAA, Rentrak

A breakdown of monthly cinema admissions in the UK is outlined in Table 1.1. Despite a period of heavy snowfall, ticket sales in January were just over a quarter higher than the equivalent month in 2012 and were the second highest of the entire year. *The Hobbit: An Unexpected Journey* and *Life of Pi*, two films that had opened at the end of 2012, were continuing to attract large audiences and the month also saw the release of the top grossing UK film of the year, *Les Misérables*, which was to become the second most successful musical of all time at the UK box office.

Admissions in February and March were lower compared with the equivalent months in 2012. The months' top earning titles *Wreck-It Ralph* and *Django Unchained* in February and *Oz the Great and Powerful* and *The Croods* in March failed to raise overall admissions to the levels of the previous year which saw *The Hunger Games*, *The Woman in Black* and *The Best Exotic Marigold Hotel* released in the same period. April admissions saw a more dramatic fall, down 21% compared with 2012, despite one of the month's releases, *Iron Man 3*, recording the second highest opening weekend of the year.

Admissions in May and June were higher than for the same months in 2012, although June admissions were only slightly above those of the equivalent month in 2012 when cinema had had to compete for audiences with the Queen's Diamond Jubilee celebrations and the European Football championships. *Iron Man 3* continued to perform well in May alongside new releases *Star Trek Into Darkness*, *Fast & Furious 6* and *The Hangover Part III* while top earners in June included *Man of Steel* and the year's highest opening title *Despicable Me 2*, which was to become the most successful release of the year.

Admissions fell again in July, despite the top film of the year continuing to attract strong audiences. July was the third hottest month in over a century, and only one of the month's releases made it into the year's top 20 films. Although it was to become the eighth most successful film of the year, *Monsters University* had the second lowest opening gross of the top 20 films.

August and September admissions were higher in 2013 than in the previous year, but this might be expected since cinema had faced further competition from 2012's summer of spectacle, with the London Olympic and Paralympic Games vying for audiences in the same period in 2012. UK films did particularly well during these months, with three titles topping the box office charts in August – *Alan Partridge: Alpha Papa*, *Kick-Ass 2* and *One Direction: This Is Us* – and two leading the charts in September – *About Time and Rush*.

Admissions in October and November were both down more than 20% on the equivalent months in 2012 which had benefited from the release of a slew of that year's top films including the UK's most successful ever release *Skyfall* which grossed twice as much as the top film of 2013. Two UK films topped the box office charts in 2013 during these two months, however, *Gravity* and *Thor: The Dark World*.

Attendances picked up again in December, which recorded the highest level of ticket sales since August. Admissions were up 9% on December 2012, thanks in part to the release of some of the year's top earning titles, *Frozen, The Hunger Games: Catching Fire* and *The Hobbit: The Desolation of Smaug,* the last of which was to hold the number one spot at the box office for the final three weeks of the year.

Table 1.1 Monthly UK cinema admissions, 2012 and 2013

Month	2012 (million)	2013 (million)	% +/- on 2012
January	13.6	17.1	+26.0
February	15.3	14.0	-8.8
March	11.7	10.9	-7.0
April	15.1	11.9	-21.0
May	13.4	15.6	+16.1
June	12.4	13.0	+5.3
July	15.5	14.3	-7.7
August	17.2	17.6	+2.4
September	9.4	9.9	+4.7
October	16.8	11.9	-29.5
November	17.6	13.7	-22.5
December	14.4	15.7	+9.0
Total	**172.5**	**165.5**	**-4.0**

Source: CAA, Rentrak

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

Average weekly admissions in 2013 ranged from 2.3 million in September to 4 million in August (Table 1.2). The largest decreases compared with 2012 occurred in October and November, due mainly to strong attendances in 2012 for *Skyfall*. In 2012 a series of landmark summer events drew people away from the cinema, but the average weekly admissions in June, August and September 2013 were only slightly higher than in the same months of 2012, and admissions during July 2013, when temperatures soared across the UK, were lower than in July 2012. January was the month with the largest increase in average weekly admissions compared with 2012, up from 3.1 million to 3.9 million.

Table 1.2 Average weekly admissions, 2012 and 2013

Month	2012 weekly average (million)	2013 weekly average (million)
January	3.1	3.9
February	3.7	3.5
March	2.6	2.5
April	3.5	2.8
May	3.0	3.5
June	2.9	3.0
July	3.5	3.2
August	3.9	4.0
September	2.2	2.3
October	3.8	2.7
November	4.1	3.2
December	3.3	3.5

Source: CAA, Rentrak

Table 1.3 shows how the 2013 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA), with London accounting for a quarter of UK admissions. The pattern of national and regional admissions has remained largely unchanged over the last decade.

Table 1.3 Cinema admissions by ISBA TV region, 2013

Region	Admissions (million)	%
London	42.2	25.5
Midlands	22.5	13.6
Lancashire	16.4	9.9
Southern	15.6	9.4
Yorkshire	13.4	8.1
Wales and West	11.5	7.0
Central Scotland	11.5	6.9
East of England	11.1	6.7
North East	6.3	3.8
Northern Ireland	5.8	3.5
South West	4.0	2.4
Northern Scotland	3.8	2.3
Border	1.3	0.8
Total	**165.5**	**100.0**

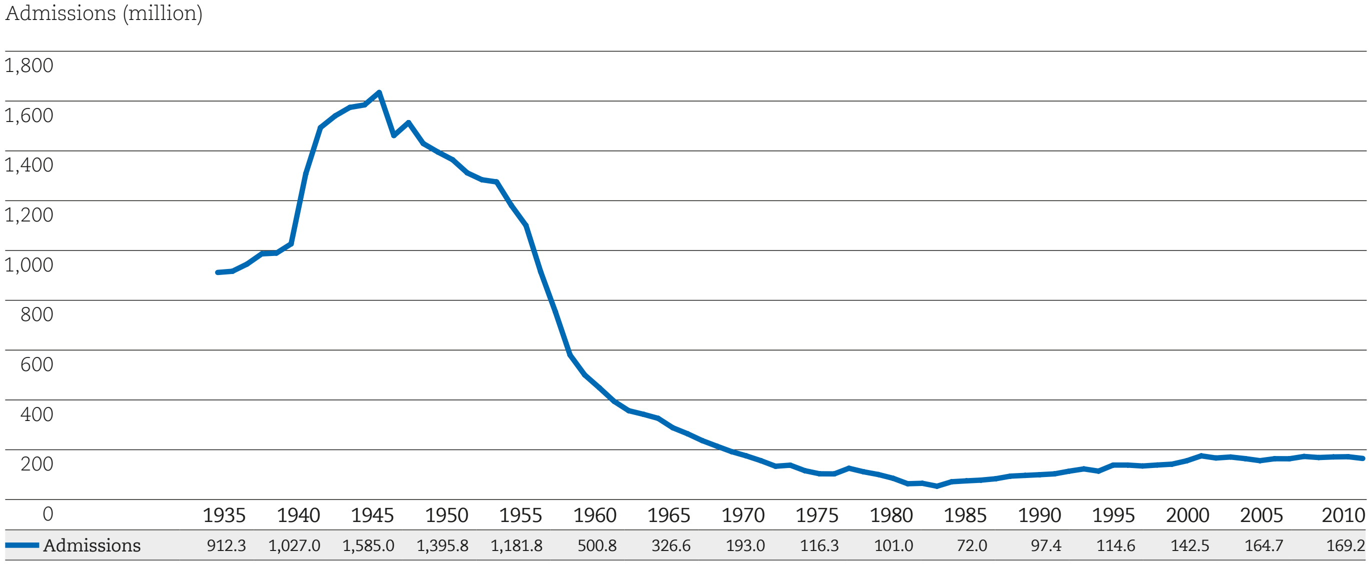
Source: CAA, Rentrak

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

Figure 1.2 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 2013 were the lowest since 2008, but from the early 2000s attendances have been fairly flat, with most years' admissions being in the range 165-170 million.

Figure 1.2 Annual UK cinema admissions, 1935-2013



Source: BFI, CAA, Rentrak

Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)	Year	Admissions (million)
1935	912.3	1949	1,430.0	1963	357.2	1977	103.5	1991	100.3	2005	164.7
1936	917.0	1950	1,395.8	1964	342.8	1978	126.1	1992	103.6	2006	156.6
1937	946.0	1951	1,365.0	1965	326.6	1979	111.9	1993	114.4	2007	162.4
1938	987.0	1952	1,312.1	1966	288.8	1980	101.0	1994	123.5	2008	164.2
1939	990.0	1953	1,284.5	1967	264.8	1981	86.0	1995	114.6	2009	173.5
1940	1,027.0	1954	1,275.8	1968	237.3	1982	64.0	1996	123.5	2010	169.2
1941	1,309.0	1955	1,181.8	1969	214.9	1983	65.7	1997	138.9	2011	171.6
1942	1,494.0	1956	1,100.8	1970	193.0	1984	54.0	1998	135.2	2012	172.5
1943	1,541.0	1957	915.2	1971	176.0	1985	72.0	1999	139.1	2013	165.5
1944	1,575.0	1958	754.7	1972	156.6	1986	75.5	2000	142.5		
1945	1,585.0	1959	581.0	1973	134.2	1987	78.5	2001	155.9		
1946	1,635.0	1960	500.8	1974	138.5	1988	84.0	2002	175.9		
1947	1,462.0	1961	449.1	1975	116.3	1989	94.5	2003	167.3		
1948	1,514.0	1962	395.0	1976	103.9	1990	97.4	2004	171.3		

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1.2 UK box office earnings

According to CAA/Rentrak, the total UK box office for 2013 was £1,083 million, down 1% on 2012. This figure covers all box office earnings during the calendar year 2013 for films exhibited in the UK whose box office takings were tracked by Rentrak. The trends in box office takings from 2001 are shown in Table 1.4 and indicate growth of 68% in the period. Growth has continued since 2008 despite the economic downturn.

Table 1.4 UK box office trends, 2001-2013

Year	Box office gross (£ million)	%+/-	Change since 2001 %
2001	645	–	–
2002	755	17.1	17.1
2003	742	-1.7	15.0
2004	770	3.8	19.4
2005	770	0.0	19.4
2006	762	-1.0	18.1
2007	821	7.7	27.3
2008	850	3.5	31.8
2009	944	11.1	46.4
2010	988	4.7	53.2
2011	1,040	5.3	61.2
2012	1,099	5.7	70.4
2013	1,083	-1.0	67.9

Source: CAA, Rentrak

1.3 Film releases and box office revenues in the UK and Republic of Ireland

In 2013, 698 films (an average of more than 13 per week) were released for a week or more in the UK and Republic of Ireland, 51 more than in 2012.

The 698 releases in 2013 generated £1,154 million in box office revenues, a decrease of 2% on 2012. This figure differs from the £1,083 million in section 1.2 because it includes revenues generated in 2014 by films released in 2013 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 2013 and includes revenues generated in 2014 up to 23 February 2014.

As can be seen in Table 1.5, the top 100 films took 91% of the box office, a very slight decrease on 2012's figure. The remaining 598 films (86% of all releases) accounted for just 9% of gross revenues. A total of 46 films were released in the 3D format, up from 43 in 2012. The 3D takings from these releases (£207 million) accounted for 18% of the total box office, the same as in 2012.

Table 1.5 Summary of results at the UK and Republic of Ireland box office, 2007-2013

	2007	2008	2009	2010	2011	2012	2013
Releases	516	527	503	557	558	647	698
Combined gross (£ million)	933.8	934.5	1,126.7	1,023.6	1,134.5	1,182.4	1,153.7
Top 20 films (% of box office)	51.2	49.6	48.6	48.2	47.5	54.8	47.8
Top 50 films (% of box office)	75.7	72.4	72.9	71.9	73.7	77.3	73.7
Top 100 films (% of box office)	91.0	90.3	91.1	89.7	90.7	92.1	91.0

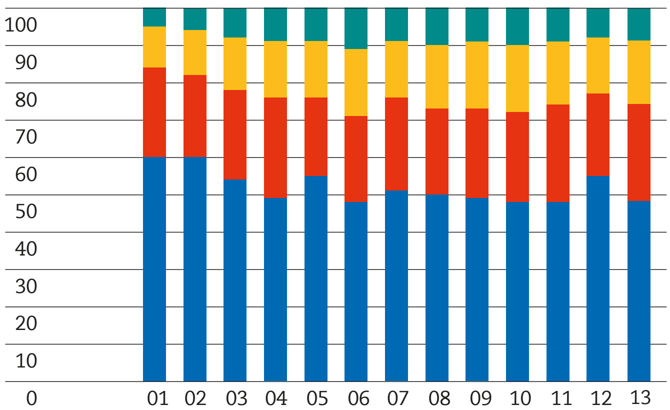
Source: Rentrak, BFI RSU analysis

Note: Table 1.5 and all subsequent analysis of the theatrical market includes all titles released in 2013. The combined gross reflects the territorial gross (ie including the Republic of Ireland), and includes those titles released in 2013 but also generating revenue into 2014, up to and including 23 February 2014.

Figure 1.3 shows that although the trend in the box office share of the top 50 highest grossing films has been falling since 2001, it increased in 2012 to 78% (the highest since 2003), but then decreased again to 74% in 2013. Also, the concentration of box office share in the top 20 films in 2012 was 55%, the highest since 2005, but then decreased to 48% in 2013. A major factor in the high percentage in 2012 was the success of *Skyfall*, whose record breaking box office gross accounted for nearly 9% of total theatrical revenue for the year. In addition, three other titles grossed over £50 million at the box office in 2012 whereas no film reached this level in 2013.

In 2013, 9% of total box office was generated by films outside the top 100, the same as in 2011. However, in 2011 the 9% of box office receipts was shared by 458 films, compared with 598 in 2013.

Figure 1.3 Market share of top 20, 21-50, 51-100 and rest of films, 2001-2013



	01	02	03	04	05	06	07	08	09	10	11	12	13
% share of rest	4	6	8	8	9	12	9	10	9	10	9	8	9
% share of 51-100	11	12	14	17	16	18	15	18	18	18	17	15	17
% share of 21-50	24	22	24	26	21	23	25	23	24	24	26	23	26
% share of top 20	60	60	54	49	55	48	51	50	49	48	48	55	48

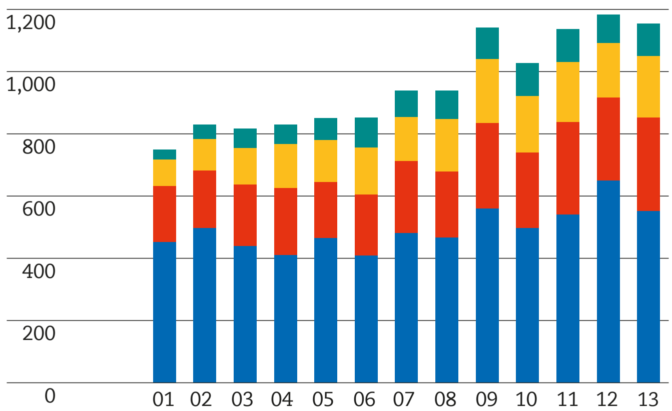
Source: Rentrak, BFI RSU analysis

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

Figure 1.4 shows the increase in box office revenue over the last 13 years. The total box office generated in 2013 was lower than in 2012 but it was the second highest recorded over the period, and was up 54% compared with 2001. The takings of the top 20 film releases in 2013, at £551 million, were down by 15% compared with 2012 (the year with the highest takings for the top 20 films) but up 22% since 2001. The films ranked 21-50 earned £299 million, up 65% since 2001, and those ranked 51-100 earned £199 million, up 137% since 2001.

The combined box office of all films outside the top 100 was £104 million in 2013, which was higher than in 2012, but lower than in 2010 and 2011 (£106 million in both years). In 2010, the £106 million taken by films outside the top 100 was shared by 457 individual titles (average £0.23 million per film) but in 2013 the £104 million taken by films outside the top 100 was shared by 598 titles (average £0.17 million). This highlights the difficulties faced by independent distributors who are competing for market share. As figures 1.3 and 1.4 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 small share of the box office.

Figure 1.4 Box office gross of top 20, 21-50, 51-100 and rest of films, 2001-2013



	01	02	03	04	05	06	07	08	09	10	11	12	13
Box office gross of rest	33	47	63	62	72	98	86	91	101	106	106	93	104
Box office gross of 51-100	84	101	118	141	135	150	142	168	206	182	193	175	199
Box office gross of 21-50	181	186	197	216	179	196	230	213	274	243	297	267	299
Box office gross of top 20	450	495	438	409	464	408	480	465	559	495	539	648	551

Source: Rentrak, BFI RSU analysis

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Table 1.6 outlines the number of films released in the UK in 2013 by the number of sites at the widest point of release (WPR). A total of 181 releases were shown at 100 sites or more (26% of all films released), while 243 films were shown at fewer than 10 sites (35%). Nearly three quarters of all films released in the UK were shown at fewer than 100 sites.

Table 1.6 Number of releases and median box office gross by number of sites at widest point of release, 2013

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
>=500	31	4.4	15,276,000	1,941,000	47,475,000
400 – 499	53	7.6	5,477,000	1,025,000	25,275,000
300 – 399	42	6.0	2,122,000	483,000	8,757,000
200 – 299	19	2.7	887,000	203,000	3,524,000
100 – 199	36	5.2	259,000	31,000	2,182,000
50 – 99	64	9.2	194,000	4,000	2,711,000
10 – 49	210	30.1	37,000	1,000	406,000
<10	243	34.8	4,000	<1,000	94,000
Total	**698**	**100.0**	**38,000**	**<1,000**	**47,475,000**

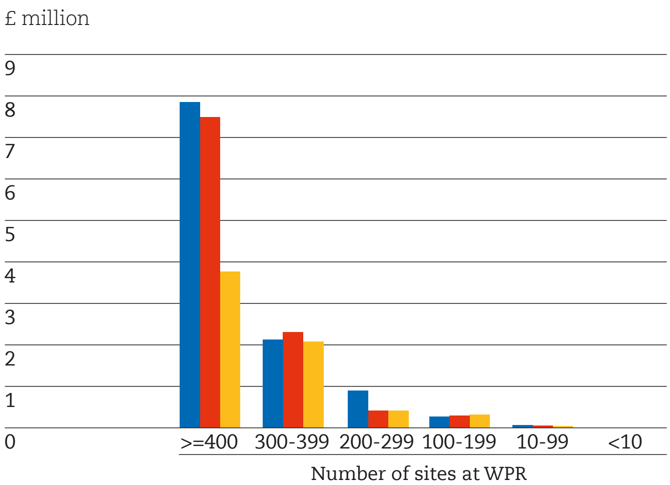
Source: Rentrak, BFI RSU analysis

Notes:
Median, minimum and maximum box office values rounded to nearest £1,000.

Figure 1.5 shows the median box office by number of sites at widest point of release for all films, UK films and UK independent films. The median for all films is higher than for the other two categories for titles released at 400 or more sites and for titles released at 200-299 sites. For the highest WPR band the median box office for UK films was around £0.3 million lower than the median for all films, but £3.7 million higher than for UK independent films. The UK films which achieve a wide release are mainly higher budget titles made in cooperation with the major US studios, and which are heavily promoted. Films in this category in 2013 included *Les Misérables, Gravity* and *Thor: The Dark World*.

In the 300-399 WPR band, the median box office for UK films was £0.18 million higher than for all films and £0.23 million higher than for UK independent films. In the other WPR bands the median values of box office takings were similar for all categories, though for films released at 100-199 sites the median box office for UK independent films was slightly higher than for the other two categories.

Figure 1.5 Median box office gross by number of sites at widest point of release for all films, UK films and UK independent films, 2013



	>=400	300-399	200-299	100-199	10-99	<10
All films	7.84	2.12	0.89	0.26	0.05	<0.01
UK films	7.48	2.30	0.40	0.28	0.04	<0.01
UK independent films	3.76	2.07	0.40	0.31	0.03	<0.01

Source: BFI, RSU

1.4 Country of origin of film releases

As Table 1.7 indicates, 35% of all films released in the UK in 2013 were of USA origin (excluding UK co-productions) and these films accounted for 73% of total box office earnings.

UK films, including co-productions, represented 20% of releases (down from 25% in 2012) and shared 22% of the box office, of which UK independent films earned 7% and UK studio-backed titles 15%.

Films whose countries of origin lie outside the UK and USA accounted for 45% of releases (almost the same as the 44% seen in 2012) but only 5.1% of earnings (down from 6.6% in 2011). The decrease in box office for non-UK and non-USA films came mainly from other European films whose box office share decreased from 4.8% in 2012 to 3.0% in 2013 (from 22% of all releases). Films from India accounted for 1.4% of the total box office from 18% of releases, and films from the rest of the world accounted for 0.7% of the box office, from 5% of releases.

Table 1.7 Country of origin of films released in the UK and Republic of Ireland, 2013

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	Box office share (%)
USA	245	35.1	839.2	72.7
UK independent	123	17.6	76.6	6.6
UK studio-backed*	16	2.3	179.1	15.5
All UK	139	19.9	255.6	22.2
Other Europe	151	21.6	35.0	3.0
India	128	18.3	16.1	1.4
Rest of the world	35	5.0	7.9	0.7
Total	**698**	**100.0**	**1,153.7**	**100.0**

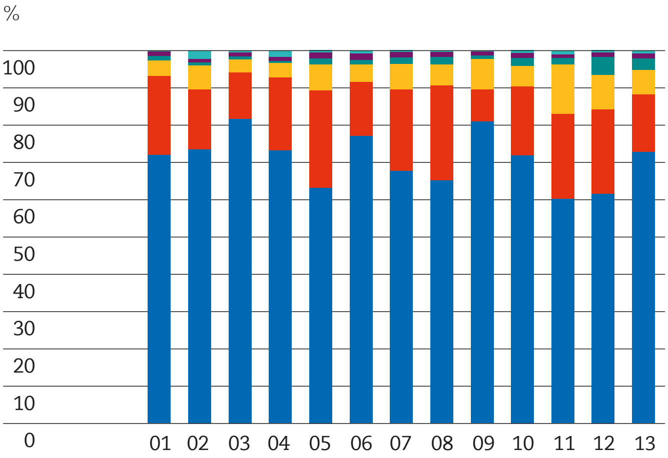
Source: Rentrak, BFI RSU analysis

Notes:
Box office gross = cumulative total up to 23 February 2014.
Sub-totals may not sum to totals due to rounding.
* 'Studio-backed' means backed by one of the major US film studios.

The changes in market share over time for films by country of origin are shown in Figure 1.6. The share of USA and UK studio-backed films had remained at around 90% up to 2010, but in 2011 this share dropped to 83%, with the share for USA-only films (60%) being the lowest for the period. Similar shares for USA and UK studio-backed films were seen in 2012, but in 2013 this share increased to 88%, a similar level to the years up to 2010.

The main reason for the lower share for USA and UK studio-backed films in 2011 was the increased share for UK independent films which, at over 13%, was at its highest level since our records began. (Top earning independent UK titles in 2011 included *The King's Speech* and *The Inbetweeners Movie*.) In 2012, the share for UK independent films, at 9%, was lower than for 2011 but still higher than for earlier years. The increased box office share for other European films in 2012 kept the share for USA and UK studio-backed films at the same level as in 2011. In 2013, the box office shares both for UK independent films and other European films were lower than in 2012, at 7% and 3% respectively.

Figure 1.6 Market share by country of origin, 2001-2013

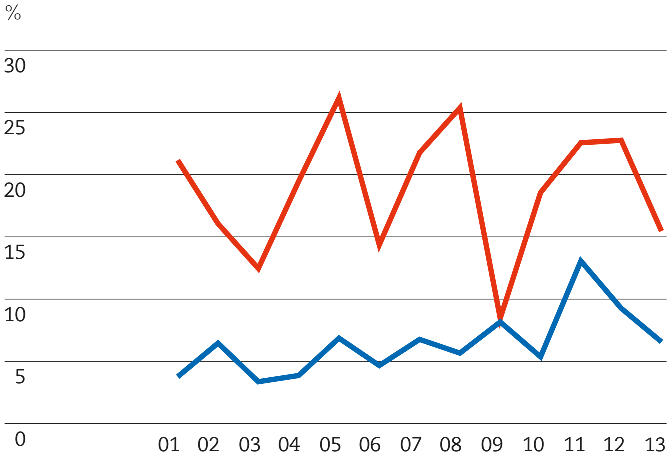


	01	02	03	04	05	06	07	08	09	10	11	12	13
Rest of the world	0.5	0.5	0.8	1.8	0.8	0.7	0.5	0.3	0.2	0.8	1.0	0.6	0.7
India	1.2	1.0	1.0	1.1	1.5	1.8	1.6	1.4	1.0	1.3	1.0	1.2	1.4
Europe	1.3	0.7	0.9	0.6	1.6	1.2	1.8	2.3	1.2	2.1	1.7	4.8	3.0
UK independent	3.8	6.5	3.4	3.9	6.9	4.7	6.8	5.7	8.2	5.4	13.1	9.3	6.6
UK studio-backed	21.2	16.1	12.5	19.5	26.2	14.4	21.8	25.4	8.5	18.6	22.6	22.8	15.5
USA	72.0	73.4	81.6	73.2	63.1	77.1	67.7	65.2	81.0	71.8	60.6	61.3	72.7

Source: BFI, RSU

The fluctuating pattern of UK market share is underlined in Figure 1.7 with the annual total dependent on a small number of high grossing titles. The average UK independent market share for the 13-year period was 6.5% with an upward trend from the low of 3.4% in 2003.

Figure 1.7 UK films' share of the UK theatrical market, 2001-2013



	01	02	03	04	05	06	07	08	09	10	11	12	13
UK studio-backed films	21.2	16.1	12.5	19.5	26.2	14.4	21.8	25.4	8.5	18.6	22.6	22.8	15.5
UK independent films	3.8	6.5	3.4	3.9	6.9	4.7	6.8	5.7	8.2	5.4	13.1	9.3	6.6

Source: BFI, RSU

Table 1.8 compares the number of UK and non-UK films released in the UK and Republic of Ireland in 2013 across several gross box office bands. There were two UK films (*Les Misérables* and *Gravity*) in the over £30 million gross box office band compared with six non-UK films (*Despicable Me 2, The Hobbit: The Desolation of Smaug, Frozen, Iron Man 3, The Hunger Games: Catching Fire* and *Monsters University*). In the second box office band there were two UK films compared with four non-UK titles, and three UK films in the third box office band compared with 17 non-UK titles. In each of these top three bands, the number of films as a percentage of all releases was similar for UK films and non-UK films.

Overall, UK films made up 21% of all releases earning over £10 million in 2013, compared with 29% in 2012. The proportion of UK films in the lowest box office band was 64% in 2013, a similar percentage to 2012's 63%.

Table 1.8 UK and non-UK releases by box office band, 2013

Box office gross (£ million)	Non-UK releases		UK releases	
	Number	% releases	Number	% releases
>=30	6	1.1	2	1.4
20 – 29.99	4	0.7	2	1.4
10 – 19.99	17	3.0	3	2.2
5 – 9.99	20	3.6	8	5.8
1 – 4.99	56	10.0	14	10.1
0.1 – 0.99	112	20.0	21	15.1
<0.1	344	61.5	89	64.0
Total	**559**	**100.0**	**139**	**100.0**

Source: Rentrak, BFI RSU analysis

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

Table 1.9 shows the percentages of UK film releases by box office band from 2007 to 2013. In 2013, 79% of UK films earned less than £1 million at the box office. This is similar to the percentages for 2009, 2010 and 2012 but higher than in 2007, 2008 and 2011. The two UK films which earned £30 million or more in 2013 equate to 1.4% of all UK releases in that year. This is similar to the percentage of UK films which earned more than £30 million in 2012, but lower than the 3.1% seen in 2011, and the third lowest of the seven-year period. The percentage of UK films earning between £20 and £30 million in 2013, at 1.4%, was the lowest since 2010, but higher than in 2008 to 2010, and the 5% of UK films in 2013 which earned £10 million or more at the box office was the same as in 2012 but down from 2010 and 2011.

Table 1.9 UK releases by box office band, 2007-2013

Box office gross (£ million)	2007		2008		2009		2010		2011		2012		2013	
	No.	% releases	No.	% releases	No.	% releases	No.	% releases	No.	% releases	No.	% releases	No.	% releases
>=30	1	0.9	3	2.7	2	1.8	2	1.7	4	3.1	2	1.2	2	1.4
20 – 29.99	4	3.7	0	0.0	1	0.9	1	0.8	3	2.4	3	1.9	2	1.4
10 – 19.99	4	3.7	2	1.8	0	0.0	6	5.0	4	3.1	3	1.9	3	2.2
5 – 9.99	6	5.5	6	5.4	6	5.3	3	2.5	6	4.7	7	4.3	8	5.8
1 – 4.99	12	11.0	17	15.3	14	12.3	10	8.4	16	12.6	13	8.0	14	10.1
0.1 – 0.99	28	25.7	23	20.7	21	18.4	20	16.8	24	18.9	32	19.8	21	15.1
<0.1	54	49.5	60	54.1	70	61.4	77	64.7	70	55.1	102	63.0	89	64.0
Total	**109**	**100.0**	**111**	**100.0**	**114**	**100.0**	**119**	**100.0**	**127**	**100.0**	**162**	**100.0**	**139**	**100.0**

Source: Rentrak, BFI RSU analysis

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

1.5 Length of release

In section 1.3 we looked at width of release, but also of interest is the length of time a film is on release. Looking at country of origin, the films which stay in cinemas longest, on average, are the films produced in the UK but made in collaboration with the major US studios (with a median length of release of 17.5 weeks), followed by films produced in the USA (12 weeks). Indian films have the shortest releases on average, with a median of three weeks (Table 1.10). At 23 weeks, the longest running studio-backed UK film in 2013 was *Les Misérables* and the longest running USA-only film was *The Croods* (49 weeks to 23 February 2014). *Despicable Me 2,* the highest grossing film of 2013 had been on release for 35 weeks to 23 February 2014.

At eight weeks, the median length of release for UK independent films was lower than for both UK studio-backed films and USA-only films, but some UK independent films did receive much longer releases. *Quartet,* the third highest grossing UK independent film of 2013, and *Le Week-End,* at 21 weeks, had the longest releases in the category. The two top grossing UK independent films of 2013, *Philomena* and *Rush,* were on release for 19 and 17 weeks respectively.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 1.10 Median number of weeks on release by country of origin

Country of origin	Number of films	Median number of weeks on release
USA	245	12
UK independent	123	8
UK studio-backed*	16	17.5
All UK	139	9
Other Europe	151	9
India	128	3
Rest of the world	35	8
Total	**698**	**9**

Source: Rentrak, BFI RSU analysis

Notes:
Number of weeks = the number of weeks on release up to 17 February 2013.
* 'Studio-backed' means backed by one of the major US film studios.

Table 1.11 shows the median length of release for English language and foreign language films, mainstream and specialised films, and three sub-categories of specialised films. (Specialised films are films which do not sit easily within a mainstream commercial genre – see Chapter 5 for more information.)

English language films (median length of release, 11 weeks) had longer releases on average than foreign language films (four weeks), and mainstream films (11 weeks) had longer releases on average than specialised films (seven weeks). Within specialised films, documentaries had the same median length of release (seven weeks) as all specialised films but re-releases had longer releases (11 weeks).

Although the median length of release for all specialised films was seven weeks, within this category some titles were shown in cinemas for considerably longer. The foreign language film with the longest release was Italian comedy drama *The Great Beauty* which was shown for 27 weeks (the longest theatrical run of all specialised films in 2013), and the documentary with the longest release was *The Act of Killing* with a run of 20 weeks. Another documentary, *The Epic of Everest,* originally shown in 1924, was the longest running re-release of the year. It was available in cinemas for 16 weeks.

Table 1.11 Median number of weeks on release by type of film

Type of film	Number of films	Median number of weeks on release
English and Welsh language*	419	11
Foreign language	279	4
Mainstream film	252	11
Specialised film**	446	7
Of which: *i) foreign language*	*279*	*4*
ii) documentary	*89*	*7*
iii) re-release	*42*	*11*

Source: Rentrak, BFI RSU analysis

Notes:
Number of weeks = the number of weeks on release up to 23 February 2014.
* One film released in 2013, *Y Syrcas (The Circus)* was a Welsh language film which has been included with the English language films in the Table as Welsh is a UK official language.
** 36 specialised films released in 2013 fall outside these three sub-categories.

- For more on the top films in 2013 see Chapter 2 (page 21)
- For more on specialised films in 2013 see Chapter 5 (page 49)
- For more on film distribution in 2013 see Chapter 9 (page 93)
- For more on weekend/weekday box office performance see Chapter 9, section 9.3 (page 99)
- For more on the exhibition sector in 2013 see Chapter 10 (page 104)

Chapter 2

Top films in 2013

Despicable Me 2 *was the highest earning film at the UK box office in 2013 with gross receipts of more than £47 million. The top performing UK film was* Les Misérables, *which earned £41 million.*

FACTS IN FOCUS:

Fourteen films earned more than £20 million at the UK box office in 2013.

Six UK films featured in the top 20 films of the year, all of which were UK/USA collaborations.

The top 20 UK films grossed £231 million, just under one fifth of the total UK box office.

UK films spent 13 weeks at the top of the UK weekend box office charts.

The box office revenue generated from 3D film screenings was £207 million. This was 18% of the total box office (the same as in 2012).

2.1 The top 20 films

The top performing film at the box office in the UK and Republic of Ireland in 2013 was animation sequel *Despicable Me 2*, with earnings (to 23 February 2014) of more than £47 million. *The Hobbit: The Desolation of Smaug* (£43 million) was the second most popular release of the year followed by the top earning UK film *Les Misérables* (£41 million). In total, six UK titles featured in the top 20, all of which were UK/USA collaborations, produced, at least partly, in the UK and mainly financed by inward investment from the major American studios. There were also six UK titles in the top 20 films of 2012, but two of these were independent UK films.

Fourteen films earned more than £20 million at the UK box office in 2013, compared with 17 in 2012 (Table 2.1). Sequels and franchises accounted for 10 of the top 20 films, compared with 13 in 2012.

Animation, including the top film, *Despicable Me 2*, was the most popular genre in the 2013 list of top 20 films with five releases earning a total of £167 million. In second place was action, also with five films, which took a total of £128 million. The top action film in the list was fifth-placed *Iron Man 3*. Unusually, only one comedy, *The Hangover Part III*, appeared in the top 20 films of 2013.

Table 2.1 Box office results for the top 20 films released in the UK and Republic of Ireland, 2013

	Title	Country of origin	Box office gross (£ million)	Number of opening weekend cinemas	Opening weekend gross (£ million)	Distributor
1	Despicable Me 2*	USA	47.5	534	14.8	Universal
2	The Hobbit: The Desolation of Smaug*	USA/NZ	42.9	585	9.3	Warner Bros
3	Les Misérables	UK/USA	40.8	590	8.1	Universal
4	Frozen*	USA	38.6	507	4.7	Walt Disney
5	Iron Man 3	USA/China	37.0	555	13.7	Walt Disney
6	The Hunger Games: Catching Fire*	USA	34.1	555	12.2	Lionsgate
7	Gravity*	UK/USA	31.1	540	6.2	Warner Bros
8	Monsters University*	USA	30.7	525	3.5	Walt Disney
9	Man of Steel	USA/Can	30.0	573	11.2	Warner Bros
10	The Croods*	USA	26.8	524	5.4	20th Century Fox
11	Star Trek Into Darkness	USA	25.8	556	8.4	Paramount
12	Fast & Furious 6	UK/USA	25.3	462	8.7	Universal
13	Wreck-It Ralph	USA	23.8	501	4.5	Walt Disney
14	Thor: The Dark World*	UK/USA	20.1	522	8.7	Walt Disney
15	The Hangover Part III	USA	19.3	473	6.0	Warner Bros
16	Captain Phillips*	UK/USA	16.1	536	3.5	Sony Pictures
17	Django Unchained	USA	15.7	445	2.8	Sony Pictures
18	The Great Gatsby	Aus/USA	15.7	524	4.1	Warner Bros
19	Oz the Great and Powerful	USA	15.3	530	3.7	Walt Disney
20	World War Z	UK/USA	14.6	488	4.5	Paramount

Source: Rentrak, BFI RSU analysis

Notes:
Box office gross = cumulative total up to 23 February 2014.
* Film still on release on 23 February 2014.

2.2 The top 20 UK qualifying films

The top 20 UK films of 2013, shown in Table 2.2, had a combined gross of £231 million, which was 20% of the total UK box office. This was down from £348 million in 2012 (29% of total box office). Seven UK films took more than £10 million in 2013, one fewer than in 2012. Most of the top 20 UK films were UK/USA collaborations. Eight of the top 20 titles were UK independent films, one fewer than in 2012, and they accounted for 23% of the total box office for the top 20 UK films (very similar to 2012's 24%).

The range of genres in the top 20 illustrates the variety of UK film production. The top UK film of 2013 was a musical and 10 other genres are represented in the top 20, including biopic, fantasy, horror and sci-fi. Action, with a combined box office gross of £64 million from five releases, was the highest earning genre of the top 20 UK films. In second place was comedy, with a gross of £31 million from four releases.

A documentary appears in the chart for the first time ever. *One Direction: This Is Us*, a concert documentary featuring the eponymous UK boy band, was the highest earning documentary at the UK box office in 2013 and became the all time top grossing UK documentary in the territory.

Table 2.2 Box office results for the top 20 UK qualifying films released in the UK and Republic of Ireland, 2013

	Title	Country of origin	Box office gross (£ million)	Distributor
1	Les Misérables	UK/USA	40.8	Universal
2	Gravity*	UK/USA	31.1	Warner Bros
3	Fast & Furious 6	UK/USA	25.3	Universal
4	Thor: The Dark World*	UK/USA	20.1	Walt Disney
5	World War Z	UK/USA	14.6	Paramount
6	Philomena*	UK	11.1	Pathé
7	Rush	UK/Ger/USA	10.1	StudioCanal
8	The World's End	UK/USA	8.7	Universal
9	Quartet	UK	8.6	eOne Films
10	One Direction: This Is Us	UK/USA	8.0	Sony Pictures
11	About Time	UK/USA	7.7	Universal
12	Jack the Giant Slayer	UK/USA	7.5	Warner Bros
13	I Give It a Year	UK/Fra/Ger	6.2	StudioCanal
14	Alan Partridge: Alpha Papa	UK	6.2	StudioCanal
15	Kick-Ass 2	UK/USA	5.5	Universal
16	Sunshine on Leith	UK	4.6	Entertainment
17	Trance	UK/USA	4.5	Pathé
18	Filth	UK/Ger/USA/Bel	3.9	Lionsgate
19	47 Ronin	UK/USA/Hun	3.2	Universal
20	Red 2	UK/USA	2.9	eOne Films

Source: Rentrak, BFI RSU analysis

Notes:
Box office gross = cumulative total up to 23 February 2014.
* Film still on release on 23 February 2014.

2.3 The top 20 UK independent films

The top 20 UK independent films, shown in Table 2.3, had a combined gross of £71 million, which was 6% of the total UK box office (slightly lower than the 8% seen in 2012). Just under 30% of this total was earned by the top two independent releases, *Philomena* and *Rush,* each of which grossed over £10 million.

Comedy was the top earning genre in the top 20 list of UK independent titles, generating £21 million from five releases. There were also five biopics in the list, which earned a combined box office gross of £16 million. The list includes one documentary – *The Stone Roses: Made of Stone* – and one animation – *Moshi Monsters: The Movie*.

Table 2.3 Box office results for the top 20 UK independent films released in the UK and Republic of Ireland, 2013

	Title	Country of origin	Box office gross (£ million)	Distributor
1	Philomena*	UK	11.1	Pathé
2	Rush	UK/Ger/USA#	10.1	StudioCanal
3	Quartet	UK	8.6	eOne Films
4	I Give It a Year	UK/Fra/Ger	6.2	StudioCanal
5	Alan Partridge: Alpha Papa	UK	6.2	StudioCanal
6	Sunshine on Leith	UK	4.6	Entertainment
7	Filth	UK/Ger/USA/Bel#	3.9	Lionsgate
8	Red 2	UK/USA#	2.9	eOne Films
9	The Harry Hill Movie*	UK	2.5	Entertainment
10	All Stars	UK/Ger	2.5	Vertigo Films
11	One Chance	UK	2.5	Entertainment
12	Song for Marion	UK	2.1	eOne Films
13	Diana	UK/Bel/Fra	1.9	eOne Films
14	Moshi Monsters: The Movie*	UK	1.7	Universal
15	Le Week-End*	UK/Fra	1.5	Curzon Film World
16	Welcome to the Punch	UK	1.2	eOne Films
17	Summer in February	UK	0.5	Metrodome
18	The Stone Roses: Made of Stone	UK	0.5	Picturehouse
19	How I Live Now	UK	0.5	eOne Films
20	The Look of Love	UK	0.5	StudioCanal

Source: Rentrak, BFI RSU analysis

Notes:
Box office gross = cumulative total up to 23 February 2014.
* Film still on release on 23 February 2014.
# *Rush*, *Filth* and *Red 2* were made with independent (non-studio) US support.

2.4 The top 3D films

Forty-six 3D films were released in 2013, which generated £207 million, up to 23 February 2014, from their 3D screenings. This aggregate gross from 3D screenings represents 18% of the UK and Republic of Ireland box office, the same as in 2012 but down from 20% in 2011 and 24% in 2010.

The top 20 3D releases in 2013 are listed in Table 2.4. *Gravity* had the highest 3D takings and, at 79%, the highest proportion of total gross from 3D screens. On average the percentage of films' total box office taken in 3D screenings has decreased since 2010. Excluding films which were shown only on 3D screens, the median 3D takings as a percentage of total takings fell from 71% in 2010 to 57% in 2011, rose slightly to 60% in 2012, but then fell to 37% in 2013, suggesting that enthusiasm for the 3D format is waning.

Table 2.4 Top 20 3D releases in the UK and Republic of Ireland, 2013 (ranked by 3D gross)

	Title	Total gross (£ million)	3D gross (£ million)	3D as % of total gross	Number of 3D sites	Distributor
1	Gravity*	31.1	24.5	79	486	Warner Bros
2	The Hobbit: The Desolation of Smaug*	42.9	16.9	39	488	Warner Bros
3	Iron Man 3	37.0	16.5	45	485	Walt Disney
4	Despicable Me 2*	47.5	12.1	25	456	Universal
5	Man of Steel	30.0	11.2	38	493	Warner Bros
6	Star Trek Into Darkness	25.8	10.0	39	488	Paramount
7	The Croods*	26.8	9.8	37	434	20th Century Fox
8	Wreck-It Ralph	23.8	9.5	40	423	Walt Disney
9	Frozen*	38.6	9.0	23	452	Walt Disney
10	Oz the Great and Powerful	15.3	8.0	52	467	Walt Disney
11	Thor: The Dark World*	20.1	7.6	38	461	Walt Disney
12	Monsters University*	30.7	6.6	22	463	Walt Disney
13	World War Z	14.6	5.8	40	411	Paramount
14	One Direction: This Is Us	8.0	5.3	66	443	Sony Pictures
15	The Great Gatsby	15.7	5.2	33	448	Warner Bros
16	The Wolverine	13.7	5.0	36	469	20th Century Fox
17	Epic	13.8	4.8	35	456	20th Century Fox
18	GI Joe: Retaliation	7.5	4.1	56	389	Paramount
19	Walking with Dinosaurs*	6.0	4.1	69	411	20th Century Fox
20	Jack the Giant Slayer	7.5	3.4	45	404	Warner Bros

Source: Rentrak

Notes:
Box office gross = cumulative total up to 23 February 2014.
* Film still on release on 23 February 2014.
The 3D grosses do not include takings from IMAX screenings, but IMAX revenues contribute to the total gross.

If we compare the average takings per screen for 3D screens with the average takings for 2D screens for a particular film, it provides a measure of the relative popularity of 3D viewings compared with 2D viewings for that film. Looking at the ratio of 3D screen averages to 2D screen averages, the higher the value the more popular were the film's 3D viewings compared with its 2D viewings.

Table 2.5 shows the top 20 films ranked by this ratio of 3D average box office per site to 2D average box office per site. The list includes the top films by this ranking from all 3D films released between 2010 and 2013 which were shown on both 3D and 2D screens.

In previous years there have been similar numbers of films from each year in the top 20 films by this ratio. However, in the present analysis, five of the films in the list are 2010 releases, seven are 2011 releases, five are 2012 releases and just three are 2013 releases. This suggests that initially audiences were attracted by the novelty of the new technology, but have become increasingly selective about the films they watch in 3D. The perception for most of 2013's 3D releases (with *Gravity* being an obvious exception) seems to have been that the 3D effect would not add to the viewing experience.

Table 2.5 Top 20 3D films ranked by ratio of 3D site average box office to 2D site average box office, 2010-2013

	Title	Year of release	3D gross (£ 000)	3D sites	3D site average (£)	2D gross (£ 000)	2D sites	2D site average (£)	Ratio of 3D site average to 2D site average
1	Raaz 3: The Third Dimension	2012	2,328	15	155,226	68	19	3,598	43.1
2	Battle of Warsaw 1920	2011	181	21	8,605	6	21	309	27.9
3	Titanic	2012	10,021	393	25,500	176	178	988	25.8
4	Tron Legacy	2010	7,743	400	19,357	574	232	2,474	7.8
5	Gravity*	2013	24,488	486	50,386	2,501	377	6,633	7.6
6	Dredd	2012	4,238	362	11,708	126	73	1,729	6.8
7	Final Destination 5	2011	4,999	383	13,051	461	237	1,947	6.7
8	The Lion King	2011	11,030	402	27,439	1,392	318	4,378	6.3
9	Immortals	2011	5,325	376	14,162	919	326	2,819	5.0
10	Alice in Wonderland	2010	32,155	337	95,414	8,311	426	19,510	4.9
11	Monsters, Inc.	2013	2,247	347	6,476	205	138	1,485	4.4
12	Justin Bieber: Never Say Never	2011	2,027	357	5,678	291	219	1,331	4.3
13	Life of Pi	2012	23,952	422	56,759	5,889	437	13,477	4.2
14	TT3D: Closer to the Edge	2011	1,193	227	5,256	147	116	1,265	4.2
15	Ghost Rider: Spirit of Vengeance	2012	2,823	349	8,090	62	31	1,991	4.1
16	StreetDance	2010	11,035	345	31,984	639	80	7,985	4.0
17	Step Up 3	2010	6,869	366	18,769	946	198	4,777	3.9
18	Texas Chainsaw 3D	2013	1,922	252	7,626	73	37	1,980	3.9
19	Clash of the Titans	2010	15,648	339	46,161	4,502	350	12,863	3.6
20	Spy Kids: All the Time in the World in 4D	2011	3,421	355	9,636	948	349	2,716	3.5

Source: Rentrak

Notes:
Box office gross = cumulative total up to 23 February 2014.
The 3D and 2D box office grosses are shown rounded to the nearest £1,000, but site averages and ratios of site averages are calculated from unrounded data.
* Film still on release on 23 February 2014.
The 3D grosses do not include takings from IMAX screenings.

2.5 Best weekend performances of UK films

A total of 34 films topped the UK weekend box office charts over the course of 2013. Nine of these were UK titles, which spent a total of 13 weeks at number one (Table 2.6). In 2012, 10 UK films achieved the number one slot in the weekend charts for a total of 20 weeks. *Les Misérables*, the third highest grossing film of the year, spent four weeks at the top of the box office charts in 2013, a number unequalled by any other release in 2013. (Two releases from 2012 topped the chart for four weeks: *Skyfall* and *The Hobbit: An Unexpected Journey*.)

Two independent UK films – *Alan Partridge: Alpha Papa* and *Rush* – topped the weekend box office charts in 2013 for one week each, compared with a total of six weeks by four independent UK films in 2012.

Table 2.6 UK films at number one in the weekend box office charts, 2013

Title	First week at top	Weekend gross (£ million)	Box office gross (£ million)	Distributor	Number of weeks at number one
Les Misérables	11/01/2013	8.1	40.8	Universal	4
Gravity*	8/11/2013	6.2	31.1	Warner Bros	2
Fast & Furious 6	17/05/2013	8.7	25.3	Universal	1
Alan Partridge: Alpha Papa	09/08/2013	2.2	6.2	StudioCanal	1
Kick-Ass 2	16/08/2013	2.5	5.5	Universal	1
One Direction: This Is Us	30/08/2013	3.5	8.0	Sony Pictures	1
About Time	06/09/2013	1.8	7.7	Universal	1
Rush	20/09/2013	1.3	10.1	StudioCanal	1
Thor: The Dark World*	01/11/2013	8.7	20.1	Walt Disney	1

Source: Rentrak, BFI RSU analysis

Notes:
Box office gross = cumulative total up to 23 February 2014.
* Film still on release on 23 February 2014.

- For more on the top films of all time see Chapter 3 (page 28)
- For more on the top films by genre in 2013 see Chapter 4 (page 34)
- For more on UK talent and awards in 2013 see Chapter 7 (page 71)
- For more on film distribution in 2013 see Chapter 9 (page 93)
- For more on weekend/weekday box office performance in 2013 see Chapter 9, section 9.3 (page 99)
- For more on the exhibition sector in 2013 see Chapter 10 (page 104)

Chapter 3

Top films of all time at the UK box office

Skyfall *remains the top earning film of all time at the UK box office, while titles based on UK characters and stories continue to lead the chart with 13 of the top 20 films.*

FACTS IN FOCUS:

Skyfall tops the list of highest grossing films at the UK box office, but no 2013 releases feature in the top 20. The top film of 2013, *Despicable Me 2*, is at number 27 in the list.

Titanic remains at the top spot in the inflation-adjusted box office chart, with *Skyfall* in second place.

Sequels and franchise films make up 16 of the all time top 20 chart.

Ten of the top 20 films are UK/USA collaborations.

Thirteen of the top 20 films are based on stories and characters created by UK writers.

One 2013 release, *Les Misérables*, appears in the chart of all time top UK films and two 2013 releases, *Philomena* and *Rush*, appear in the chart of all time top independent UK films.

3.1 Top 20 films at the UK box office, 1989-2013

Table 3.1 shows the top 20 films of all time at the UK box office. The chart features no films released in 2013, as the highest grossing title of the year was *Despicable Me 2*, whose takings of £47 million make it the all time 27th top earning release at the UK box office.

Two films on the list have swapped places since last year's edition of the Yearbook. With a final box office tally of £52.3 million, *The Hobbit: An Unexpected Journey* overtook *The Full Monty* (£52.2 million) to take the 17th spot in the chart.

The list is dominated by franchise movies, including four of the eight Harry Potter titles, the first of the Hobbit trilogy, all three of the Lord of the Rings trilogy and the three latest James Bond films. Only four of the top 20 films are neither sequels nor franchise titles, namely *Avatar* (although three sequels to this film are currently in pre-production), *The Full Monty, Mamma Mia!* and *Titanic*. Ten of the top 20 films are UK/USA collaborations and 13 of the top 20 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.

Ranking all time top films

In the absence of admissions data on individual films, top films can only be measured in terms of earnings at the box office. Inflation is a key factor affecting earnings and this needs to be borne in mind against some of the figures quoted in this chapter (however, some figures are adjusted for inflation). Most of this chapter relates to actual box office receipts from 1989 onwards (although coverage of box office figures for some high grossing films goes back to 1975), so can be categorised as all time top films since it is unlikely that anything produced before 1989 will have earned more in nominal terms.

Table 3.1 Top 20 films at the UK box office, 1989-2013

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	Skyfall	UK/USA	102.9	Sony Pictures	2012
2	Avatar	USA	94.0	20th Century Fox	2009
3	Titanic#	USA	80.1	20th Century Fox	1998/2012
4	Toy Story 3	USA	74.0	Walt Disney	2010
5	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
6	Mamma Mia!	UK/USA	68.5	Universal	2008
7	Harry Potter and the Philosopher's Stone	UK/USA	66.1	Warner Bros	2001
8	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	63.0	Entertainment	2001
9	The Lord of the Rings: The Return of the King	USA/NZ	61.1	Entertainment	2003
10	The Lord of the Rings: The Two Towers	USA/NZ	57.6	Entertainment	2002
11	Star Wars Episode I: The Phantom Menace#	USA	56.4	20th Century Fox	1999/2012
12	The Dark Knight Rises	UK/USA	56.3	Warner Bros	2012
13	Casino Royale	UK/USA/Cze	55.6	Sony Pictures	2006
14	Harry Potter and the Chamber of Secrets	UK/USA	54.8	Warner Bros	2002
15	Pirates of the Caribbean: Dead Man's Chest	USA	52.5	Walt Disney	2006
16	Harry Potter and the Deathly Hallows: Part 1	UK/USA	52.5	Warner Bros	2010
17	The Hobbit: An Unexpected Journey	USA/NZ	52.3	Warner Bros	2012
18	The Full Monty	UK/USA	52.2	20th Century Fox	1997
19	Marvel Avengers Assemble	USA	51.9	Walt Disney	2012
20	Quantum of Solace	UK/USA	51.2	Sony Pictures	2008

Source: Rentrak, BFI RSU analysis

Notes:
Figures have not been inflation adjusted.
Box office gross = cumulative total up to 23 February 2014.
The box office grosses for *Titanic* and *Star Wars Episode I: The Phantom Menace* include the grosses from their original releases plus the grosses from their 3D re-releases in 2012.

3.2 Inflation-adjusted top 20 films at the UK box office, 1975-2013

Table 3.2 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 begins). This table contains the same films as in last year's edition of the Yearbook as no 2013 releases appear in the chart.

With the takings from its original 1998 release plus the takings from its 3D re-release in 2012, *Titanic* remains the highest grossing film of all time at the UK box office with earnings of £107 million in 2012/13 terms. *Skyfall* is in second place with £105 million and *Avatar* is third with £102 million.

Harry Potter and the Philosopher's Stone, one of three Harry Potter films on the list, is at number four, with inflation-adjusted earnings of £87 million. All three Lord of the Rings films make the chart with *The Lord of the Rings: The Fellowship of the Ring* in fifth place (£83 million). In sixth place is *Toy Story 3*, the highest earning film of 2010, with an adjusted gross of £79 million. Three classic releases from the 1970s remain in the top 20: *Jaws* (1975) is at number eight with adjusted revenues of £76 million, the original *Star Wars* (1977) appears at number 15 with £72 million, and *Grease* (1978) is 17th with £66 million.

Table 3.2 Top 20 highest grossing films at the UK box office, 1975-2013 (inflation adjusted[1])

	Title	Country of origin	UK box office total (2012/13 £ million)	Distributor	Year of release
1	Titanic#	USA	107.4	20th Century Fox	1998/2012
2	Skyfall	UK/USA	104.7	Sony Pictures	2012
3	Avatar	USA	102.3	20th Century Fox	2009
4	Harry Potter and the Philosopher's Stone	UK/USA	87.2	Warner Bros	2001
5	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	83.1	Entertainment	2001
6	Toy Story 3	USA	79.0	Walt Disney	2010
7	Mamma Mia!	UK/USA	77.3	Universal	2008
8	Jaws	USA	76.2	UIP	1975
9	Harry Potter and the Deathly Hallows: Part 2	UK/USA	76.1	Warner Bros	2011
10	The Lord of the Rings: The Return of the King	USA/NZ	75.9	Entertainment	2003
11	Jurassic Park	USA	75.7	UIP	1993
12	Star Wars Episode I: The Phantom Menace	USA	75.2	20th Century Fox	1999/2012
13	The Full Monty	UK/USA	74.4	20th Century Fox	1997
14	The Lord of the Rings: The Two Towers	USA/NZ	73.7	Entertainment	2002
15	Star Wars	USA	71.6	20th Century Fox	1977
16	Harry Potter and the Chamber of Secrets	UK/USA	70.1	Warner Bros	2002
17	Grease	USA	66.0	UIP	1978
18	Casino Royale	UK/USA/Cze	63.9	Sony Pictures	2006
19	Pirates of the Caribbean: Dead Man's Chest	USA	60.3	Walt Disney	2006
20	E.T., The Extra-Terrestrial	USA	60.3	UIP	1982

Source: Rentrak, BFI RSU analysis

Notes:
[1] The 2012/13 £ is calculated using the HMT UK GDP deflator (see link at end of chapter).
The box office grosses for *Titanic* and *Star Wars Episode I: The Phantom Menace* include the grosses from their original releases plus the grosses from their 3D re-releases in 2012.

3.3 Top 20 UK qualifying films at the UK box office, 1989-2013

The list of the all time top 20 UK films is dominated by US studio-backed features but two independent films, *The King's Speech* and *The Inbetweeners Movie*, are at numbers 16 and 17 in the list (Table 3.3). *Skyfall* is at number one and the two other James Bond films to star Daniel Craig both appear in the top 20. All eight Harry Potter films appear in the list, with 2011's *Harry Potter and the Deathly Hallows: Part 2* in second place. 2013's *Les Misérables* is the only new entry in the list, appearing in 19th place with takings of £41 million. The top 11 UK films have all earned over £50 million at the UK box office.

Table 3.3 Top 20 UK qualifying films at the UK box office, 1989-2013

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	Skyfall	UK/USA	102.9	Sony Pictures	2012
2	Harry Potter and the Deathly Hallows: Part 2	UK/USA	73.1	Warner Bros	2011
3	Mamma Mia!	UK/USA	68.5	Universal	2008
4	Harry Potter and the Philosopher's Stone	UK/USA	66.1	Warner Bros	2001
5	The Dark Knight Rises	UK/USA	56.3	Warner Bros	2012
6	Casino Royale	UK/USA/Cze	55.6	Sony Pictures	2006
7	Harry Potter and the Chamber of Secrets	UK/USA	54.8	Warner Bros	2002
8	Harry Potter and the Deathly Hallows: Part 1	UK/USA	52.5	Warner Bros	2010
9	The Full Monty	UK/USA	52.2	20th Century Fox	1997
10	Quantum of Solace	UK/USA	51.2	Sony Pictures	2008
11	Harry Potter and the Half-Blood Prince	UK/USA	50.7	Warner Bros	2009
12	Harry Potter and the Order of the Phoenix	UK/USA	49.9	Warner Bros	2007
13	Harry Potter and the Goblet of Fire	UK/USA	49.2	Warner Bros	2005
14	The Dark Knight	UK/USA	49.1	Warner Bros	2008
15	Harry Potter and the Prisoner of Azkaban	UK/USA	46.1	Warner Bros	2004
16	The King's Speech	UK	45.7	Momentum	2011
17	The Inbetweeners Movie	UK	45.0	Entertainment	2011
18	Bridget Jones's Diary	UK/USA	42.0	UIP	2001
19	Les Misérables	UK/USA	40.8	Universal	2013
20	Charlie and the Chocolate Factory	UK/USA	37.8	Warner Bros	2005

Source: Rentrak, BFI RSU analysis

Notes:
Figures have not been inflation adjusted.
Box office gross = cumulative total up to 23 February 2014.

3.4 Top 20 independent UK films at the UK box office, 1989-2013

Table 3.4 lists the top 20 all time highest earning independent (that is, made without US major studio involvement) UK titles. The two highest grossing independent British films are both 2011 releases. *The King's Speech* and *The Inbetweeners Movie* each took more than £45 million at the UK box office, easily beating the previous record of £32 million taken by *Slumdog Millionaire* in 2009. Two 2013 releases appear in the list. *Philomena* is at number 14 with takings of £11 million (up to 23 February 2014) and *Rush* is at number 18 with £10 million. The top 18 UK independent films all earned more than £10 million at the UK box office, and the top six earned over £20 million each.

Table 3.4 Top 20 independent UK films at the UK box office, 1989-2013

	Title	Country of origin	UK box office total (£ million)	Distributor	Year of release
1	The King's Speech	UK	45.7	Momentum	2011
2	The Inbetweeners Movie	UK	45.0	Entertainment	2011
3	Slumdog Millionaire	UK	31.7	Pathé	2009
4	Four Weddings and a Funeral	UK	27.8	Carlton	1994
5	The Woman in Black	UK/USA/Swe#	21.3	Momentum	2012
6	The Best Exotic Marigold Hotel	UK/USA/Ind#	20.4	20th Century Fox	2012
7	Tinker, Tailor, Soldier, Spy	UK/Fra/Ger	14.2	StudioCanal	2011
8	Trainspotting	UK	12.4	PolyGram	1996
9	St Trinian's	UK	12.3	Entertainment	2007
10	Gosford Park	UK/USA#	12.3	Entertainment	2002
11	StreetDance 3D	UK/Ger/Ita	11.8	Vertigo Films	2010
12	Kick-Ass	UK/USA#	11.8	Universal	2010
13	Bend it Like Beckham	UK/Ger	11.6	Lionsgate	2002
14	Philomena*	UK	11.1	Pathé	2013
15	Run, Fat Boy, Run	UK/USA#	11.0	Entertainment	2007
16	Kevin and Perry Go Large	UK	10.5	Icon	2000
17	East is East	UK	10.4	Film Four	1999
18	Rush	UK/Ger/USA#	10.1	StudioCanal	2013
19	The Iron Lady	UK	9.9	Pathé	2012
20	The Queen	UK/Fra/Ita	9.4	Pathé	2006

Source: Rentrak, BFI RSU analysis

Notes:
Figures have not been inflation adjusted.
Box office gross = cumulative total up to 23 February 2014.
* Film still on release on 23 February 2014.
# *The Woman in Black*, *The Best Exotic Marigold Hotel*, *Gosford Park*, *Kick-Ass*, *Run, Fat Boy, Run* and *Rush* were made with independent (non-studio) US support.

- For more on the top films at the UK box office in 2013 see Chapter 2 (page 21)
- For more on UK talent see Chapter 7 (page 71)

- For information on the deflators used to calculate inflation adjusted box office takings see www.hm-treasury.gov.uk/data_gdp_index.htm

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 4

Genre and classification

Animation was the most popular genre among UK cinema-goers in 2013, with action second and comedy third. As in previous years, there were more '15' releases than any other classification, but '12A' films generated the largest single share of the box office.

FACTS IN FOCUS:

Animation, the highest earning genre of 2013, accounted for only 5% of releases but took 21% of the total box office. The top earning animation was *Despicable Me 2*.

Comedy accounted for the highest proportion of releases (22%) and took 14% of the box office. The top earning comedy was *The Hangover Part III*.

Adventure took more money per cinema on average than other genres. The top earning adventure was *The Hunger Games: Catching Fire*.

Six of the top performing films by genre were UK films, including the top biopic, top horror and top sci-fi releases. The top earning music/dance title, and the highest grossing UK film of the year, was *Les Misérables*.

Comedy was the favourite genre for UK independent films, taking 28% of this category's total box office from 20% of releases.

4.1 Genre

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) and the Internet Movie Database (IMDb).

4.1.1 Genre of all film releases

Table 4.1 shows the relative popularity of different genres at the box office in the UK and Republic of Ireland in 2013. The pattern of box office by genre each year is usually determined by a small number of high grossing releases. Animation, which included the biggest film of the year, *Despicable Me 2*, was the top earning genre with a combined gross of £247 million. *Despicable Me 2's* takings made up just under one fifth (19%) of this genre's total box office gross. Action was the second highest earning genre of the year with a combined gross of £215 million and comedy was third with £158 million. Sci-fi was in fourth place with £87 million despite this genre having only nine releases during the year.

Six of the top performing titles by genre were UK films, which highlights the variety of story types for successful British films. These six UK films, including two UK independent films, were *Gravity, I Give It a Year, Les Misérables, One Direction: This Is Us, Philomena* and *World War Z*.

Table 4.1 Films released in the UK and Republic of Ireland by genre, 2013 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Animation	33	4.7	246.6	21.4	Despicable Me 2
Action	47	6.7	215.4	18.7	Iron Man 3
Comedy	153	21.9	158.2	13.7	The Hangover Part III
Sci-fi	9	1.3	87.4	7.6	Gravity
Drama	141	20.2	59.7	5.2	The Great Gatsby
Fantasy	9	1.3	59.5	5.2	The Hobbit: The Desolation of Smaug
Adventure	8	1.1	57.7	5.0	The Hunger Games: Catching Fire
Horror	37	5.3	57.5	5.0	World War Z
Crime	33	4.7	48.6	4.2	American Hustle
Music/dance	11	1.6	48.6	4.2	Les Misérables
Biopic	22	3.2	40.2	3.5	Philomena
Thriller	64	9.2	29.1	2.5	Prisoners
Western	3	0.4	20.4	1.8	Django Unchained
Romance	34	4.9	13.9	1.2	I Give It a Year
Documentary	89	12.8	10.7	0.9	One Direction: This Is Us
War	5	0.7	0.3	<0.1	Lore
Total	**698**	**100.0**	**1,153.7**	**100.0**	

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Notes:
Percentages may not sum to 100 due to rounding.
Figures as at 23 February 2014.

The pattern of genres ranked by the average number of sites at the widest point of release (WPR) is shown in Table 4.2. The top genre by WPR in 2013 was sci-fi followed by western and fantasy. For all three of these genres the average WPRs are based on low numbers of releases, many of which were heavily promoted by the major US studios. The sci-fi films include *Gravity, Oblivion* and *Star Trek Into Darkness* (WPRs of 572, 527 and 556 respectively), the westerns include *Django Unchained* and *The Lone Ranger* (WPRs of 458 and 519) and the fantasy films include *Beautiful Creatures, The Hobbit: The Desolation of Smaug* and *Percy Jackson: Sea of Monsters* (WPRs of 423, 598 and 464). The UK film *Les Misérables* had the highest individual WPR (600) of all 2013 releases.

At the opposite end of the scale, the average WPR for the war genre was 14 and for documentaries was 20. Only five war films were released in 2013 and the title with the widest release was the German language film *Lore* (WPR of 27). The documentary with the widest release was the music/concert documentary *One Direction: This Is Us*, which had a WPR of 479. The other major music documentary released in 2013 was *Justin Bieber's Believe* (WPR of 103). If these two documentaries were excluded, the average WPR for the genre would have been just 14.

Table 4.2 Films released in the UK and Republic of Ireland by genre, 2013 (ranked by average widest point of release)

Genre	Average number of sites at widest point of release	Number of releases	Gross box office (£ million)
Sci-fi	422	9	87.4
Western	327	3	20.4
Fantasy	280	9	59.5
Animation	273	33	246.6
Adventure	251	8	57.7
Action	206	47	215.4
Biopic	193	22	40.2
Music/dance	168	11	48.6
Horror	145	37	57.5
Crime	132	33	48.6
Comedy	102	153	158.2
Thriller	89	64	29.1
Romance	59	34	13.9
Drama	45	141	59.7
Documentary	20	89	10.7
War	14	5	0.3
All genres	**108**	**698**	**1,153.7**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.

Table 4.3 shows box office revenues per site by genre, which gives a good indication of performance in the market while controlling for the size of release. Adventure tops this list, largely due to the success of *The Hunger Games: Catching Fire* and *Oz the Great and Powerful*, and animation, which included the top 10 hits *Despicable Me 2, Frozen, Monsters University* and *The Croods*, is second. Comedy, which had the greatest number of releases and took the third largest slice of overall box office, is much lower placed when the average box office per site is taken into account, indicating that a large number of comedy releases fail to make a mark with audiences.

Table 4.3 Films released in the UK and Republic of Ireland by genre, 2013 (ranked by average box office gross per site)

Genre	Average box office per site	Gross box office (£ million)	Total sites
Adventure	28,816	57.7	2,004
Animation	27,383	246.6	9,004
Music/dance	26,310	48.6	1,846
Fantasy	23,639	59.5	2,516
Sci-fi	23,024	87.4	3,796
Action	22,239	215.4	9,685
Western	20,732	20.4	982
Crime	11,186	48.6	4,346
Horror	10,708	57.5	5,367
Comedy	10,103	158.2	15,663
Drama	9,478	59.7	6,296
Biopic	9,461	40.2	4,252
Romance	6,895	13.9	2,014
Documentary	6,052	10.7	1,776
Thriller	5,127	29.1	5,667
War	4,846	0.3	70
All genres	**15,325**	**1,153.7**	**75,284**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Notes:
Total sites = number of releases multiplied by average number of sites at widest point of release.
Figures as at 23 February 2014.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

4.1.2 Genre of UK and UK independent film releases

Action topped the box office by genre chart for all UK films released in 2013, with *Fast & Furious 6* taking just under two fifths (39%) of the genre's total box office (Table 4.4). Music/dance, which included the top UK film of the year, *Les Misérables*, is second in the list, and comedy is third. Documentary had more releases (32) than any of the other genres, but took less than 4% of the total box office gross. The top documentary, *One Direction: This Is Us*, took 85% of the box office total for all UK documentaries.

Table 4.4 UK films released in the UK and Republic of Ireland by genre, 2013 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Action	9	6.5	64.1	25.1	Fast & Furious 6
Music/dance	4	2.9	47.9	18.8	Les Misérables
Comedy	26	18.7	37.9	14.8	The World's End
Sci-fi	1	0.7	31.1	12.1	Gravity
Biopic	6	4.3	16.8	6.6	Philomena
Horror	7	5.0	14.8	5.8	World War Z
Documentary	33	23.7	9.4	3.7	One Direction: This Is Us
Crime	8	5.8	8.9	3.5	Trance
Adventure	2	1.4	8.0	3.1	Jack the Giant Slayer
Romance	3	2.2	6.2	2.4	I Give It a Year
Thriller	17	12.2	4.1	1.6	The Counsellor
Fantasy	1	0.7	3.2	1.3	47 Ronin
Animation	5	3.6	1.9	0.8	Moshi Monsters: The Movie
Drama	17	12.2	1.3	0.5	Hyde Park on Hudson
Total	**139**	**100.0**	**255.6**	**100.0**	

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Notes:
Percentages may not add to 100 due to rounding.
Figures as at 23 February 2014.

As Table 4.5 shows, comedy was the most popular genre amongst independent UK films, which made up the majority of UK film releases (88.5%). The £22 million earned by comedy films represented 27% of the total box office for all UK independent films. This is largely due to the success of *Quartet* and *Alan Partridge: Alpha Papa* which earned £9 million and £6 million respectively. Biopic was the second highest earning genre with 21% of the total box office. *Philomena*, the top UK independent film of the year was responsible for 66% of the genre's total box office in this category. The second highest earning UK independent film of the year, *Rush*, took 76% of the action genre's total which pushed action to third place in the list. No UK independent films were categorised as fantasy or sci-fi in 2013.

Table 4.5 UK independent films released in the UK and Republic of Ireland by genre, 2013 (ranked by gross box office)

Genre	Number of releases	% of all releases	Gross box office (£ million)	% of total box office	Top performing title
Comedy	24	19.5	21.5	28.1	Quartet
Biopic	6	4.9	16.8	21.9	Philomena
Action	6	4.9	13.2	17.3	Rush
Music/dance	3	2.4	7.1	9.3	Sunshine on Leith
Romance	3	2.4	6.2	8.1	I Give It a Year
Crime	7	5.7	4.4	5.7	Filth
Thriller	14	11.4	2.1	2.7	Welcome to the Punch
Animation	5	4.1	1.9	2.5	Moshi Monsters: The Movie
Drama	17	13.8	1.3	1.7	Hyde Park on Hudson
Documentary	31	25.2	1.3	1.7	The Stone Roses: Made of Stone
Adventure	1	0.8	0.5	0.6	How I Live Now
Horror	6	4.9	0.2	0.3	Citadel
Total	**123**	**100.0**	**76.6**	**100.0**	

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

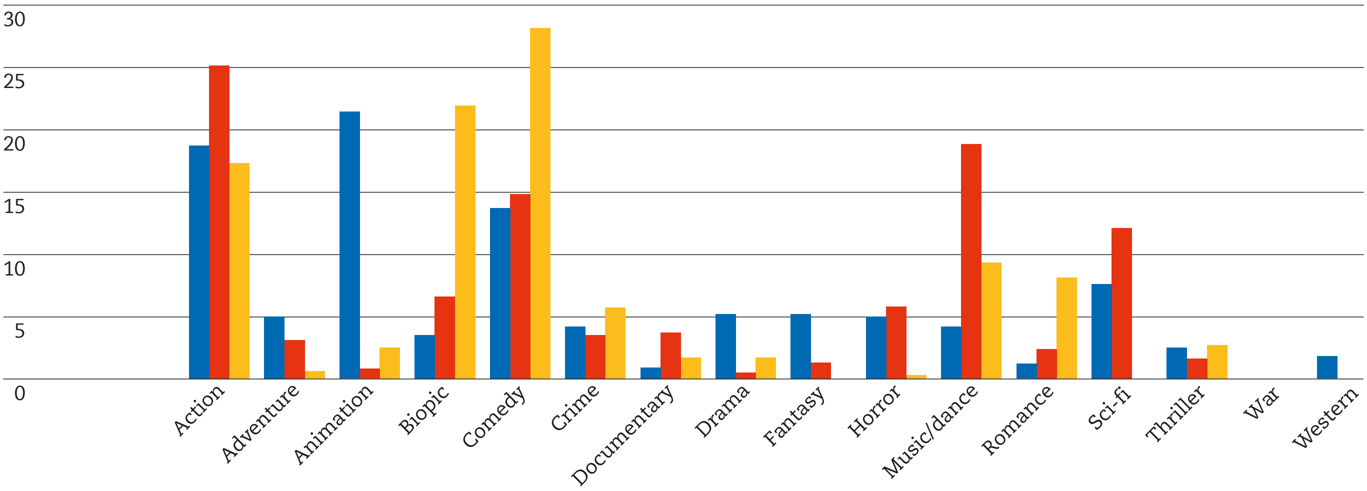
Notes:
Percentages/figures may not sum to totals due to rounding.
Figures as at 23 February 2014.

Looking at UK films and UK independent films released in 2013, we see mainly similar rankings to those for all films in terms of percentages of releases by genre, but differences in the share of box office by genre (Figures 4.1 and 4.2). Comedy, drama and documentary are the genres with most releases for all three categories, but UK films and UK independent films had higher proportions of documentaries compared with all films, and all films had a higher proportion of dramas compared with the other two categories.

However, when looking at box office by genre, there are notable differences between the three categories. For all films animation was the highest earning genre (21%), whereas for UK films action was the top genre (25% of the total box office for UK films) and for UK independent films comedy earned the most (28% of total box office). The second and third highest earning genres for all films were action (19% of total box office) and comedy (14%) and for UK films the second and third ranked genres were music/dance (19%) and comedy (15%). For UK independent films the second highest earning genre was biopic with 22% of the total box office for this category and the third genre was action with 17% of the box office total (Tables 4.1, 4.4 and 4.5).

Figure 4.1 Proportion of box office by genre for all films, UK films and UK independent films, 2013

% of box office

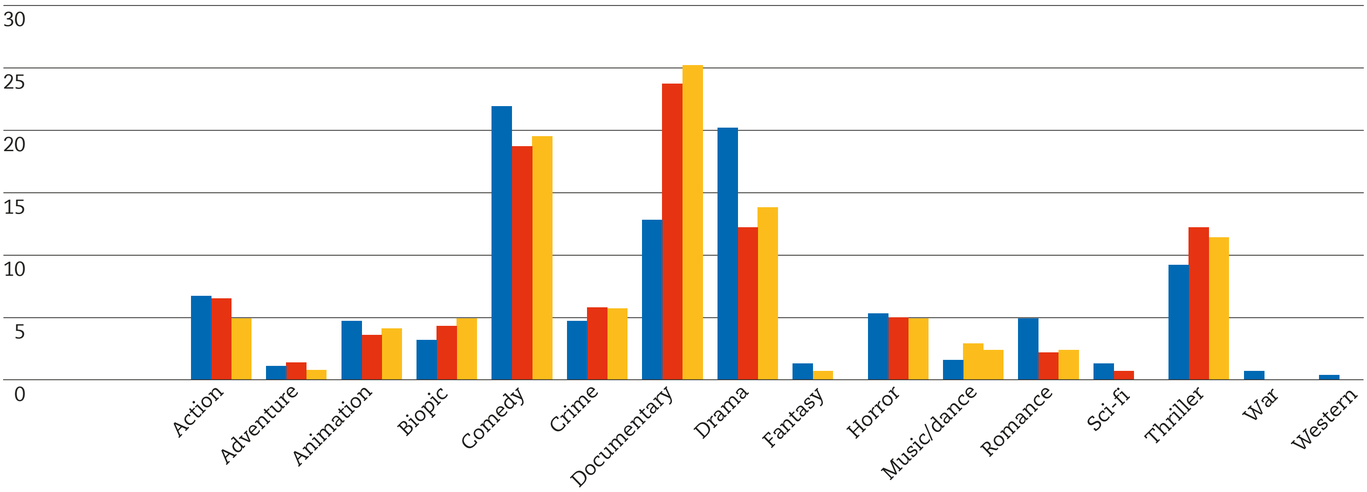


	Action	Adventure	Animation	Biopic	Comedy	Crime	Documentary	Drama	Fantasy	Horror	Music/dance	Romance	Sci-fi	Thriller	War	Western
All films	18.7	5.0	21.4	3.5	13.7	4.2	0.9	5.2	5.2	5.0	4.2	1.2	7.6	2.5	<0.1	1.8
UK films	25.1	3.1	0.8	6.6	14.8	3.5	3.7	0.5	1.3	5.8	18.8	2.4	12.1	1.6	–	–
UK independent films	17.3	0.6	2.5	21.9	28.1	5.7	1.7	1.7	-	0.3	9.3	8.1	–	2.7	–	–

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Figure 4.2 Proportion of releases by genre for all films, UK films and UK independent films, 2013

% of releases



	Action	Adventure	Animation	Biopic	Comedy	Crime	Documentary	Drama	Fantasy	Horror	Music/dance	Romance	Sci-fi	Thriller	War	Western
All films	6.7	1.1	4.7	3.2	21.9	4.7	12.8	20.2	1.3	5.3	1.6	4.9	1.3	9.2	0.7	0.4
UK films	6.5	1.4	3.6	4.3	18.7	5.8	23.7	12.2	0.7	5.0	2.9	2.2	0.7	12.2	–	–
UK independent films	4.9	0.8	4.1	4.9	19.5	5.7	25.2	13.8	–	4.9	2.4	2.4	–	11.4	–	–

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

4.2 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 in Table 4.6.

Table 4.6 BBFC cinema film classifications

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

Source: BBFC website

4.2.1 Releases and box office by classification

Table 4.7 provides a picture of how 2013 releases were classified. It shows that, as in previous years, more '15' films (38%) were released than any other category, but the largest share of box office gross was earned by '12A' films (46%). The proportion of releases for '15' films was lower than in 2012 (43%) but was higher for '12A' films (32% compared with 29%). Films classified as '15' in 2013 accounted for 24% of the box office gross.

Table 4.7 All releases in the UK and Republic of Ireland by BBFC film classification, 2013

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	45	6.4	188.6	16.3	Despicable Me 2
PG	79	11.3	123.0	10.7	Frozen
12A	225	32.2	525.4	45.5	The Hobbit: The Desolation of Smaug
15	268	38.4	282.0	24.4	The Hangover Part III
18	73	10.5	34.8	3.0	Django Unchained
No classification	8	1.1	<0.1	<0.1	The Invisible Lighthouse
Total	**698**	**100.0**	**1,153.7**	**100.0**	

Source: Rentrak, BBFC, BFI RSU analysis

Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Figures as at 23 February 2014.
Percentages/figures may not sum to totals due to rounding.

Table 4.8 shows the breakdown of classifications for UK films released in 2013, and Table 4.9 shows the breakdown for UK independent films. The proportions of films released by BBFC classification were similar for all films, UK films and UK independent films (except that for UK films and UK independent films there were more '15' releases than for all films and for all films there was a compensating higher proportion of '12A' releases compared with UK films and UK independent films), but there were differences in box office takings by classification between the three categories (Figure 4.3).

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 4.8 Releases of UK films in the UK and Republic of Ireland by BBFC film classification, 2013

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	10	7.2	4.9	1.9	All Stars
PG	15	10.8	17.4	6.8	One Direction: This Is Us
12A	33	23.7	163.6	64.0	Les Misérables
15	63	45.3	63.0	24.7	World War Z
18	15	10.8	6.7	2.6	Filth
No classification	3	2.2	<0.1	<0.1	The Invisible Lighthouse
Total	**139**	**100.0**	**255.6**	**100.0**	

Source: Rentrak, BBFC, BFI RSU analysis

Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Figures as at 23 February 2014.
Percentages may not add to 100 due to rounding.

Table 4.9 Releases of UK independent films in the UK and Republic of Ireland by BBFC film classification, 2013

BBFC classification	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Top performing title
U	9	7.3	4.7	6.2	All Stars
PG	14	11.4	9.3	12.2	Sunshine on Leith
12A	25	20.3	27.9	36.5	Philomena
15	58	47.2	29.7	38.8	Rush
18	14	11.4	4.8	6.3	Filth
No classification	3	2.4	<0.1	<0.1	The Invisible Lighthouse
Total	**123**	**100.0**	**76.6**	**100.0**	

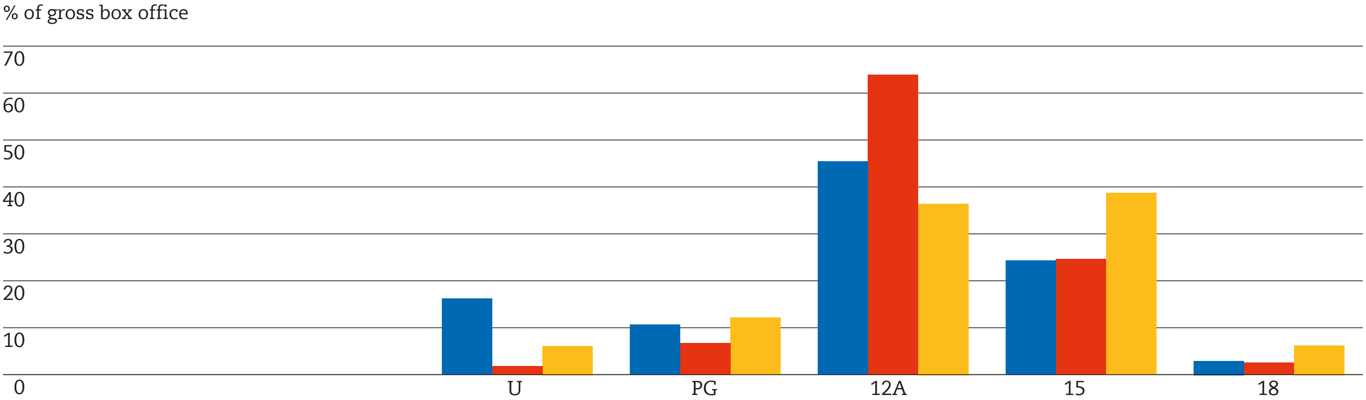
Source: Rentrak, BBFC, BFI RSU analysis

Notes:
'No classification' means no classification issued for theatrical release. Some of these films have a classification for video release.
Figures as at 23 February 2014.
Percentages may not add to 100 due to rounding.

As Figure 4.3 shows, for all films and UK films the highest earning classification was ‘12A’ followed by ‘15’, but for UK independent films the ‘15’ classification earned slightly more than the ‘12A’ classification. For UK films nearly two thirds (64%) of the total box office came from ‘12A’ films. The top four UK films of 2013, *Les Misérables, Gravity, Fast & Furious 6* and *Thor: The Dark World*, were all ‘12A’ films, and these four titles alone took 46% of the total box office for UK films. For all films the ‘12A’ classification took 46% of the box office, due mainly to the strong performance of the UK films mentioned above as well as *The Hobbit: The Desolation of Smaug, Iron Man 3* and *The Hunger Games: Catching Fire*. For UK independent films the ‘15’ classification took 39% of the box office. Leading independent titles rated ‘15’ were *Rush* (the second highest grossing UK independent film of the year), *I Give It a Year* and *Alan Partridge: Alpha Papa*.

Both all films and UK independent films earned a larger proportion of their overall box office from the ‘PG’ classification than UK films. High earning non-UK ‘PG’ films included *Frozen* and *Wreck-It Ralph*, and the top earning UK independent ‘PG’ film was *Sunshine on Leith*. The ‘U’ classification generated a much larger proportion of total box office for all films compared with UK films and UK independent films. ‘U’ rated releases included a number of high earning animated titles from the US majors including the top grossing film of the year, *Despicable Me 2*.

Figure 4.3 Percentage of gross box office by BBFC film classification for all films, UK films and UK independent films, 2013



	U	PG	12A	15	18
All films	16.3	10.7	45.5	24.4	3.0
UK films	1.9	6.8	64.0	24.7	2.6
UK independent films	6.2	12.2	36.5	38.8	6.3

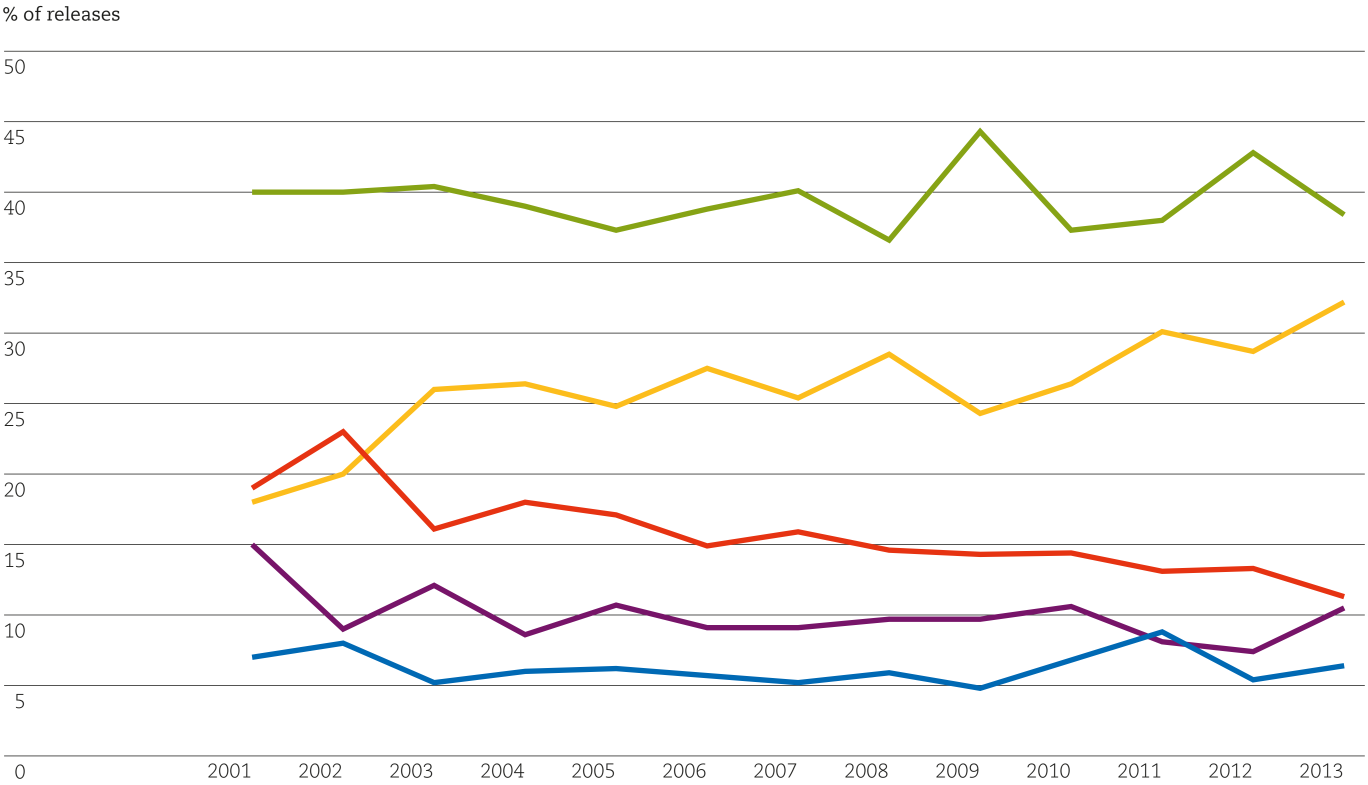
Source: Rentrak, BBFC, BFI RSU analysis

Notes:
Category ‘12A’ includes those films that were given the ‘12’ classification before 2003. The ‘12’ classification was superseded by ‘12A’ for films shown at the cinema in August 2002. The first film given a ‘12A’ rating was *The Bourne Identity*.
Figures as at 23 February 2014.

There has been some gradual change in the proportions of releases by classification over the last 13 years, as shown in Figure 4.4. The share of releases for the most common classification, ‘15’, has mainly been around 40%, and was 38% in 2013. The second and third most common classifications ‘PG’ and ‘12A’ have together accounted for over 40% of releases for most of the period. During that time, the slow decline in the ‘PG’ classification has been compensated by a rising trend in the ‘12A’ rating. The ‘U’ and ‘18’ classifications have consistently accounted for the smallest percentages of releases since 2001. In 2011 there were slightly more ‘U’ films released than ‘18’ films, but in all other years, more ‘18’ films than ‘U’ films have been released. In 2013 the proportion of ‘18’ releases was only slightly less than the proportion of ‘PG’ releases.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 4.4 Percentage of releases in the UK and Republic of Ireland by film classification, 2001-2013



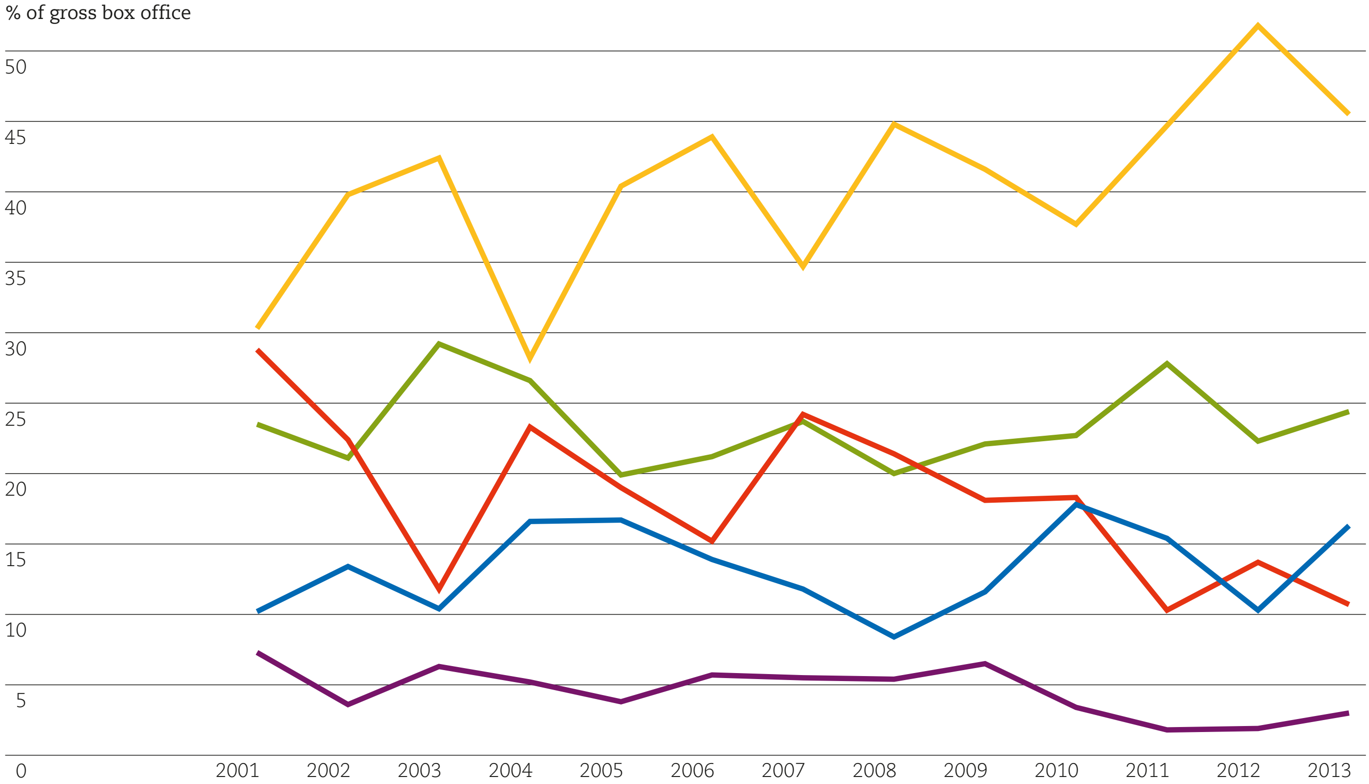
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
U	7.0	8.0	5.2	6.0	6.2	5.7	5.2	5.9	4.8	6.8	8.8	5.4	6.4
PG	19.0	23.0	16.1	18.0	17.1	14.9	15.9	14.6	14.3	14.4	13.1	13.3	11.3
12A	18.0	20.0	26.0	26.4	24.8	27.5	25.4	28.5	24.3	26.4	30.1	28.7	32.2
15	40.0	40.0	40.4	39.0	37.3	38.8	40.1	36.6	44.3	37.3	38.0	42.8	38.4
18	15.0	9.0	12.1	8.6	10.7	9.1	9.1	9.7	9.7	10.6	8.1	7.4	10.5

Source: Rentrak, BBFC, BFI RSU analysis

See first note to Figure 4.3.

The shares of box office by film classification vary from year to year as demonstrated in Figure 4.5. However, the box office ranking of the classifications has remained fairly constant over time, the top earner being ‘12A’, with ‘U’ and ‘18’ typically being the lowest earners. The exceptions are 2011 and 2013 when ‘PG’ films earned less than ‘U’ films. Apart from these two years, ‘PG’ and ‘15’ films have exchanged second and third places over the period. In 2013 the box office share of the ‘12A’ classification decreased for the first time since 2010, but over the time shown in the graph it has had an increasing trend in box office share. In 2013, 46% of the total box office was generated by ‘12A’ classified films.

Figure 4.5 Percentage of gross box office of releases in the UK and Republic of Ireland by film classification, 2001-2013



	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
U	10.2	13.4	10.4	16.6	16.7	13.9	11.8	8.4	11.6	17.8	15.4	10.3	16.3
PG	28.8	22.4	11.8	23.3	19.0	15.2	24.2	21.4	18.1	18.3	10.3	13.7	10.7
12A	30.3	39.8	42.4	28.2	40.4	43.9	34.7	44.8	41.6	37.7	44.7	51.8	45.5
15	23.5	21.1	29.2	26.6	19.9	21.2	23.7	20.0	22.1	22.7	27.8	22.3	24.4
18	7.3	3.6	6.3	5.2	3.8	5.7	5.5	5.4	6.5	3.4	1.8	1.9	3.0

Source: Rentrak, BBFC, BFI RSU analysis

See note to Figure 4.3.
Figures as at 23 February 2014.

4.2.2 Top films by classification

Table 4.10 shows the top 10 'U' classified films at the box office in the UK and Republic of Ireland in 2013. Animation films are traditionally aimed at the youngest audiences, and every one of the top 10 'U' classified films was an animation. All 10 films were shown in both 3D and 2D, compared with six in 2012. Overall, for the 10 films, 28% of the box office was taken from 3D screens. *Walking with Dinosaurs*, at 69%, generated the highest percentage of total box office from 3D screenings, while *Planes* made the lowest percentage (12%).

Table 4.10 Top 10 'U' classified films, 2013

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
Despicable Me 2*	USA	47.5	Universal	Animation
Monsters University*	USA	30.7	Walt Disney	Animation
The Croods*	USA	26.8	20th Century Fox	Animation
Epic	USA	13.8	20th Century Fox	Animation
Cloudy with a Chance of Meatballs 2*	USA	12.5	Sony Pictures	Animation
The Smurfs 2	USA	12.4	Sony Pictures	Animation
Turbo*	USA	11.9	20th Century Fox	Animation
Planes	USA	9.0	Walt Disney	Animation
Walking with Dinosaurs*	USA/Ind	6.0	20th Century Fox	Animation
Justin and the Knights of Valour*	Spa	3.2	eOne Films	Animation

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.
* Film still on release on 23 February 2014.

Eight different genres are represented in the top 10 performing 'PG' classified films in 2013 (Table 4.11). The top five films were shown in both 3D and 2D. *One Direction: This Is Us*, at 67%, made the highest percentage of its total gross from 3D screenings, and *Frozen*, with 23%, made the lowest percentage. Three UK films appear in the list of the top 10 'PG' classified films. There were none in 2012.

Table 4.11 Top 10 'PG' classified films, 2013

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
Frozen*	USA	38.6	Walt Disney	Animation
Wreck-It Ralph	USA	23.8	Walt Disney	Animation
Oz the Great and Powerful	USA	15.3	Walt Disney	Adventure
One Direction: This Is Us	UK/USA	8.0	Sony Pictures	Documentary
Percy Jackson: Sea of Monsters	USA	7.3	20th Century Fox	Fantasy
The Secret Life of Walter Mitty*	USA	6.7	20th Century Fox	Comedy
Blue Jasmine*	USA	5.2	Warner Bros	Drama
Sunshine on Leith	UK	4.6	Entertainment	Music/dance
Saving Mr. Banks*	USA	4.4	Walt Disney	Biopic
The Harry Hill Movie*	UK	2.5	Entertainment	Comedy

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.
* Film still on release on 23 February 2014.

Half of the releases in the list of top ‘12A’ classified films are action titles. The top two films in this list are *The Hobbit: The Desolation of Smaug* and *Les Misérables*, which were the second and third highest grossing films of the year (*Les Misérables* was also the highest grossing UK film of the year). Five of the top 10 films are UK films, one more than in 2012 (Table 4.12).

Table 4.12 Top 10 ‘12A’ classified films, 2013

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
The Hobbit: The Desolation of Smaug*	USA/NZ	42.9	Warner Bros	Fantasy
Les Misérables	UK/USA	40.8	Universal	Music/dance
Iron Man 3	USA/China	37.0	Walt Disney	Action
The Hunger Games: Catching Fire*	USA	34.1	Lionsgate	Adventure
Gravity*	UK/USA	31.1	Warner Bros	Sci-fi
Man of Steel	USA	30.0	Warner Bros	Action
Star Trek Into Darkness	USA	25.8	Paramount	Sci-fi
Fast & Furious 6	UK/USA	25.3	Universal	Action
Thor: The Dark World*	UK/USA	20.1	Walt Disney	Action
Captain Phillips*	UK/USA	16.1	Sony Pictures	Action

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.
* Film still on release on 23 February 2014.

By definition, ‘15’ classified films contain stronger material than those deemed suitable for younger audiences. Depending on the type of film they are likely to involve more adult-oriented themes and the use of stronger language. This is reflected in the top 10 for 2013, where comedy is the most common genre with four titles, including the top film, *The Hangover Part III*, followed by horror with two titles (Table 4.13). Three UK films appear in the top 10, compared with one in 2012.

Table 4.13 Top 10 ‘15’ classified films, 2013

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
The Hangover Part III	USA	19.3	Warner Bros	Comedy
World War Z	UK/USA	14.6	Paramount	Horror
Anchorman 2: The Legend Continues*	USA	14.3	Paramount	Comedy
American Hustle*	USA	13.3	Entertainment	Crime
The Conjuring	USA	10.5	Warner Bros	Horror
Rush	UK/Ger/USA	10.1	StudioCanal	Action
Elysium	USA	9.1	Sony Pictures	Sci-fi
The World’s End	UK/USA	8.7	Universal	Comedy
We’re the Millers	USA	8.6	Warner Bros	Comedy
Prisoners	USA	7.3	eOne Films	Thriller

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.
* Film still on release on 23 February 2014.

Films classified as '18' generally appeal to a narrower audience than other classifications, due to their strong content. The most popular genres of the top 10 titles in this category in 2013 were horror and crime, with four and three titles respectively (Table 4.14). In recent years, some '18' classified films, such as *Brüno* and *Inglourious Basterds* in 2009 and *The Girl with the Dragon Tattoo* in 2011, have broken the £10 million barrier, but it is unusual for '18' films to take so much at the box office. However, in 2013, *Django Unchained* grossed more than £15 million. Two UK films were in the top 10 '18' films in 2013, one fewer than in 2012.

Table 4.14 Top 10 '18' classified films, 2013

Title	Country of origin	Gross box office (£ million)	Distributor	Genre
Django Unchained	USA	15.7	Sony Pictures	Western
Filth	UK	3.9	Lionsgate	Crime
Evil Dead	USA	3.4	StudioCanal	Horror
Texas Chainsaw 3D	USA	2.0	Lionsgate	Horror
The Counsellor	UK/USA	1.9	20th Century Fox	Thriller
Only God Forgives	Fra/Thai/USA	1.3	Lionsgate	Crime
You're Next	USA	1.2	Lionsgate	Horror
Stoker	USA	0.9	20th Century Fox	Horror
Spring Breakers	USA	0.9	Vertigo Films	Crime
Don Jon	USA	0.8	Warner Bros	Comedy

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.
* Film still on release on 23 February 2014.

- For more on cinema admissions and box office in 2013 see Chapter 1 (page 10)
- For more on the top foreign language films of the last 12 years see Chapter 5 (page 49)
- For more on cinema audiences see Chapter 15 (page 157)
- For more on film classification in the UK see www.bbfc.org.uk

Image: *The Great Beauty* courtesy of Artificial Eye

Chapter 5

Specialised films

Specialised films are a vital part of our film culture and offer audiences an experience of cinema that is very different from mainstream commercial fare. In 2013, they made up nearly two thirds of films released in the UK and grossed nearly £110 million.

FACTS IN FOCUS:

446 specialised films were released in the UK in 2013 (64% of total films released) earning £109.7 million (9.5% of the total box office).

Films in 32 different languages (including English and Welsh) were released in the UK in 2013.

279 foreign language films made up 40% of total releases, but shared just 2% of the UK box office.

Hindi was the top non-English language at the UK box office and the highest earning foreign language film was *Dhoom: 3* (in Hindi) which grossed nearly £3 million.

89 documentary films were released, accounting for 13% of releases and just under 1% of the total box office.

There were 42 specialised re-releases (6% of the total), accounting for 0.1% of the total box office.

5.1 About specialised films

The BFI considers most feature documentaries, subtitled foreign language films and re-releases of archive/classic films to be specialised. Other films that do not fall into these categories may also be considered as specialised. These films may be less easy to define as a particular genre or may deal with more complex and challenging subject matter than the majority of mainstream films. Many are from the independent production sector (although they may be handled by a mainstream, studio-based distributor) or are made with a low production budget (compared with a studio production). They may focus more on script and character rather than effects and star names and may be expected to appeal to a narrower audience segment than mainstream films. (Non-feature film releases such as recorded live performances are not considered to be specialised; they are categorised as event cinema. For more information, see Chapter 10.)

In recent years some mainstream films which were originally made and shown in 2D, have been 're-released' in the 3D format. Examples include the original *Toy Story* (released in 3D in 2009), *The Lion King* (2011) and *Beauty and the Beast*, *Star Wars: Episode 1 – The Phantom Menace* and *Titanic* (all released in 3D in 2012). In previous editions of the Yearbook these have been considered as specialised films under the re-release criterion. However, this year 3D re-issues of mainstream films have been treated as mainstream rather than specialised releases. Three such films were released in 2013: *Finding Nemo*, *Jurassic Park* and *Monsters, Inc*. These three films are not included as specialised in the present chapter. Also, in order to present a consistent time series, the 3D re-issues of mainstream films considered as specialised in previous editions of the Yearbook are not included in Figures 5.1, 5.2 and 5.3.

5.2 Specialised films at the UK box office in 2013

In total, 446 specialised films were released in 2013, representing 64% of the total number of UK theatrical releases in the year (Table 5.1). These films grossed £110 million, a 9.5% share of total box office earnings. However, documentaries (0.9%), foreign language films (2.2%) and re-releases (0.1%) took a very small share of UK box office revenues.

Table 5.1 Specialised films in the UK and Republic of Ireland, 2013

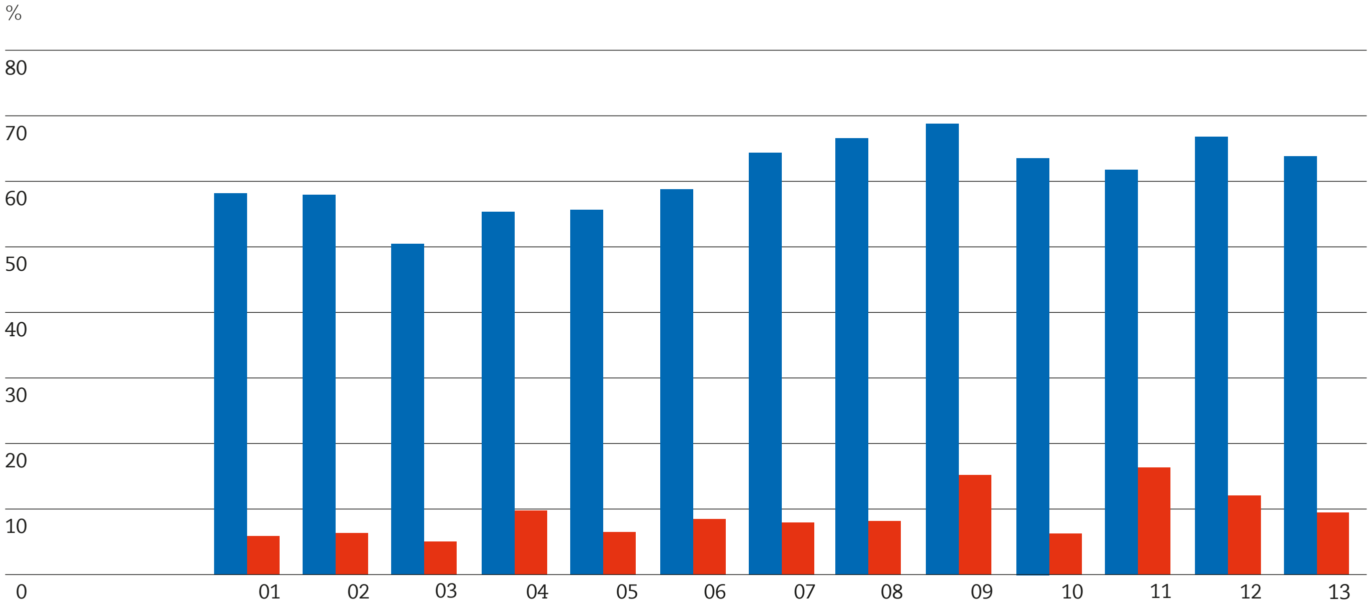
Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	89	12.8	10.7	0.9	20
Foreign language	279	40.0	24.8	2.2	17
Re-release	42	6.0	1.3	0.1	19
Other specialised	70	10.0	73.5	6.4	121
All specialised films*	446	63.9	109.7	9.5	35
All films	698	100.0	1,153.7	100.0	108

Source: BFI RSU analysis of Rentrak data

* Due to some overlap of categories (eg a film can be categorised as both foreign language and documentary) the total refers to the number of specialised films, not the sum total of the categories in the table.

An analysis of specialised film releases and market share from 2001 to 2013 is shown in Figure 5.1. The proportion of specialised film releases increased steadily from 2003 to 2009 while their market share has remained at around 8% apart from three peak years in 2009, 2011 and 2012 when a small number of specialised titles crossed over to mainstream audiences.

Figure 5.1 Specialised films, 2001-2013, percentage of releases and market share



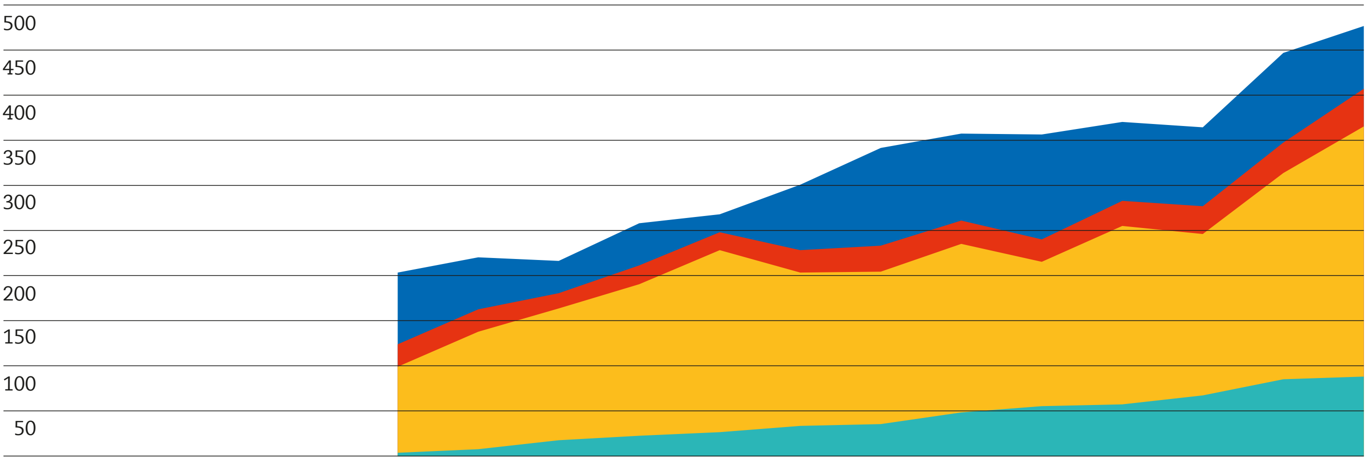
	01	02	03	04	05	06	07	08	09	10	11	12	13
Specialised films as % of total releases	58.2	58.0	50.5	55.4	55.7	58.8	64.4	66.6	68.8	63.6	61.8	66.8	63.9
Market share of specialied films (%)	5.9	6.4	5.1	9.8	6.5	8.5	8.0	8.2	15.2	6.3	16.4	12.1	9.5

Source: BFI RSU analysis of Rentrak data

By sorting specialised films into four separate categories – documentaries, foreign language films, re-releases and others (films with a distinctive genre, hook or style) – we can better understand the patterns of specialised film distribution over time. As Figure 5.2 shows, there has been a steady increase in the number of theatrically released feature documentaries over the last 13 years – from a low point of four in 2001 to 89 in 2013. The number of foreign language films has also increased over the period, from a low of 96 releases in 2001 to a peak of 279 in 2013. The number of re-released films tracked by Rentrak was usually in the range 20 to 30 up to 2011, but then increased in 2012 and 2013. However, the numbers do not include all re-releases, particularly limited or one-off screenings often in independent cinemas. The increase in numbers of re-releases seen since 2011 may partly be explained by the expansion of digital distribution. Finally, the more subjective category of films with an innovative or unconventional approach, genre or style saw numbers decline from 86 in 2000 to a low of 20 in 2005 before rising again to a peak of 117 in 2009. There were 70 releases in this category in 2013.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 5.2 Number of specialised releases, 2001-2013

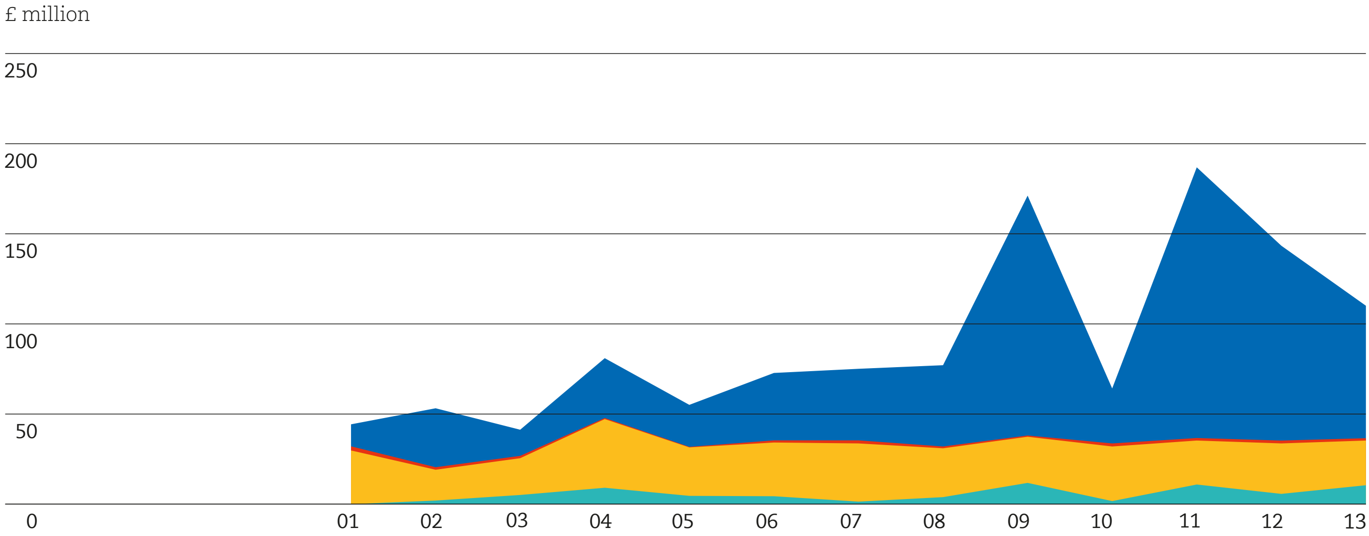


	01	02	03	04	05	06	07	08	09	10	11	12	13
Documentary	4	8	18	23	27	34	36	49	56	58	68	86	89
Foreign language	96	131	147	169	203	171	170	188	161	199	180	230	279
Re-release	25	25	17	21	20	25	29	26	25	28	31	34	42
Other specialised	80	58	36	47	20	73	109	97	117	88	88	100	70

Source: BFI RSU analysis of Rentrak data

The box office performance of specialised films, again split into the four categories of documentaries, foreign language films, re-releases and other films with a distinctive hook, genre or style, is shown in Figure 5.3. Box office revenues for all categories of specialised films are particularly affected by the release of a small number of high earning titles. Over the 13-year period, revenues for documentaries have witnessed peaks with the release of a number of break-out titles such as *Farenheit 9/11* in 2004, *Michael Jackson's This Is It* in 2009, *Senna* in 2011 and *One Direction: This Is Us* in 2013. Similarly, foreign language film grosses have peaked with the release of titles such as *Crouching Tiger, Hidden Dragon* and *Amélie* in 2001 and *The Passion of the Christ* in 2004. The combined annual revenues for re-releases of archive/classic titles are consistently small, rarely rising above £1.5 million. Finally, the more subjective category of films with distinctive and non-mainstream genres or styles has achieved its highest grosses in years when a few of its titles translated critical acclaim into box office success – *Slumdog Millionaire* in 2009, *The King's Speech* in 2011 and *Life of Pi* in 2012. The top release in this category in 2013 was the UK independent film *Philomena*.

Figure 5.3 Box office gross of specialised films, 2001-2013



	01	02	03	04	05	06	07	08	09	10	11	12	13
Documentary (£ million)	0.2	2.2	5.3	9.3	4.8	4.6	1.6	4.1	12.0	1.9	11.1	5.9	10.7
Foreign language (£ million)	29.8	17.1	20.4	38.1	26.9	29.8	32.3	27.1	25.6	30.3	24.4	28.0	24.8
Re-release (£ million)	2.3	1.4	1.3	0.6	0.3	1.2	1.7	1.0	0.7	1.7	1.4	1.6	1.3
Other specialised (£ million)	12.2	32.7	14.5	33.2	23.3	37.4	39.7	45.1	133.1	30.5	150.2	108.1	73.5

Source: BFI RSU analysis of Rentrak data

5.3 Non-English language films

Films in 32 different languages (including English) were released in the UK and the Republic of Ireland in 2013, two fewer than in 2012 (Table 5.2). Hindi was the next most common language after English in terms of number of releases, followed by Tamil, French and Punjabi. Hindi was again the top non-English language at the box office by value, with a 1% share of revenues, followed by French (0.2%) and Tamil (0.1%). There was one Welsh language film released during the year, Y *Syrcas (The Circus)*.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 5.2 Languages of films released, 2013

Main language	Number of releases	Gross box office (£ million)	Box office share (%)
English	360	917.1	79.5
English with others*	58	211.8	18.4
Hindi	42	13.0	1.1
French	32	2.7	0.2
Tamil	38	1.7	0.1
Spanish	12	1.5	0.1
Italian	10	1.2	0.1
Punjabi	24	1.2	0.1
German	15	0.7	0.1
Turkish	21	0.5	<0.1
Japanese	9	0.5	<0.1
Arabic	3	0.4	<0.1
Polish	8	0.3	<0.1
Malayalam	19	0.2	<0.1
Danish	2	0.2	<0.1
Indonesian	1	0.1	<0.1
Hebrew	3	0.1	<0.1
Mandarin	1	0.1	<0.1
Swedish	3	0.1	<0.1
Romanian	2	0.1	<0.1
Dutch	3	0.1	<0.1
Russian	17	0.1	<0.1
Tagalog	1	<0.1	<0.1
Icelandic	1	<0.1	<0.1
North American Indian	1	<0.1	<0.1
Korean	5	<0.1	<0.1
Farsi	1	<0.1	<0.1
Telugu	1	<0.1	<0.1
Finnish	1	<0.1	<0.1
Kurdish	1	<0.1	<0.1
Kannada	1	<0.1	<0.1
Welsh**	1	<0.1	<0.1
Portuguese	1	<0.1	<0.1
Total	**698**	**1,153.7**	**100.0**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Notes:
* 'English with others' includes films whose main language was English but with extensive use of other languages, such as *Captain Phillips* in English and Somali.
** Welsh is a UK official language.

The 30 foreign languages were spread over 279 releases in the UK and Republic of Ireland (40% of all releases, up four percentage points on 2012) which earned £25 million at the box office (Table 5.3). This represented 2.2% of the total UK gross box office for 2013.

Table 5.3 Foreign language films at the UK and Republic of Ireland box office, 2002-2013

	Number	% of all releases	Box office (£ million)	% of total gross box office
2002	131	35.5	17.1	2.2
2003	147	34.7	20.4	2.5
2004	169	37.5	38.1	4.6
2005	203	43.5	26.9	3.2
2006	171	33.9	29.8	3.5
2007	170	32.9	32.3	3.5
2008	188	35.7	27.1	2.9
2009	161	32.0	25.6	2.3
2010	199	35.7	30.3	3.0
2011	180	32.3	24.4	2.2
2012	230	35.5	28.0	2.4
2013	279	40.0	24.8	2.2

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.

Films in European languages other than English earned 0.6% of the gross box office from 15.5% of releases and South Asian subcontinent languages shared 1.4% of the box office from 17.9% of releases (Table 5.4). Taken together, foreign language films were shown on average at 17 sites at their widest point of release (down from 20 in 2012) compared with an average of 168 sites for English language releases.

Table 5.4 Language of releases in the UK and Republic of Ireland, 2013 (ranked by number of releases)

Main language	Number of releases	% of releases	Gross box office (£ million)	% of gross box office	Average sites at widest point of release
English and English with others*	418	59.9	1,128.9	97.8	168
European other than English**	108	15.5	6.9	0.6	13
South Asian subcontinent	125	17.9	16.1	1.4	23
Other international	29	4.2	1.1	0.1	5
Other Asian	18	2.6	0.7	0.1	14
Total	**698**	**100.0**	**1,153.7**	**100.0**	**108**

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Notes:
* See note to Table 5.2.
** Includes Welsh.
Figures as at 23 February 2014.
Percentages may not sum to 100 due to rounding.

Table 5.5 shows the top 10 non-Hindi foreign language films of 2013. At number one in this list is Italian Oscar® winner, *The Great Beauty*, which took just under £1 million at the UK box office. This film was the fourth highest earning foreign language release in 2013 after three Hindi language titles.

French occurs most often in the chart of the top 10 non-Hindi foreign language films, with three entries in the list, followed by Spanish with two.

Table 5.5 Top 10 foreign language films (excluding Hindi*) released in the UK and Republic of Ireland, 2013

	Title	Country of origin	Gross box office (£ million)	Distributor	Main language
1	The Great Beauty	Italy	0.96	Curzon Film World	Italian
2	In the House	France	0.85	eOne Films	French
3	I'm So Excited!	Spain	0.85	Pathé	Spanish
4	Blue Is the Warmest Colour	France/Belgium/Spain	0.67	Curzon Film World	French
5	Wadjda	Saudi Arabia/Germany	0.40	Soda Pictures	Arabic
6	Populaire	France	0.35	eOne Films	French
7	No	Chile/France/USA	0.35	Network Releasing	Spanish
8	Vishwaroopam	India	0.31	Ayngaran	Tamil
9	Lore	Germany/Australia/UK	0.30	Curzon Film World	German
10	Sadda Haq	India	0.26	Five Rivers Promotions	Punjabi

Source: Rentrak BBFC, IMDb, BFI RSU analysis

Notes:
* For Hindi titles, see Table 5.6.
Figures as at 23 February 2014.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 5.6 shows the top 10 film releases of 2013 whose principal language is Hindi. At the top of the list is action sequel *Dhoom: 3*, which was the highest grossing foreign language film of 2013, with box office takings of nearly £3 million. In second place is *Chennai Express*, which also took more than £2 million, and third is *Yeh Jawaani Hai Deewani*, which took more than £1 million.

Table 5.6 Top 10 Hindi language films released in the UK and Republic of Ireland, 2013

	Title	Country of origin	UK box office total (£ million)	Distributor
1	Dhoom: 3	India	2.71	Yash Raj Films
2	Chennai Express	India	2.18	UTV Motion Pictures
3	Yeh Jawaani Hai Deewani	India	1.07	Eros International
4	Goliyon Ki Raasleela Ram-leela	India	0.93	Eros International
5	Race 2	India	0.91	UTV Motion Pictures
6	Krrish 3	India	0.83	Eros International
7	Besharam	India	0.40	Reliance Entertainment
8	Boss	India	0.32	Tip Top Entertainment
9	Bhaag Milkha Bhaag	India	0.26	Reliance Entertainment
10	Special 26	India	0.24	Tip Top Entertainment

Source: Rentrak, BBFC, IMDb, BFI RSU analysis

Note: Figures as at 23 February 2014.

Table 5.7 shows the 10 highest grossing non-English language films since 2001. The top film is *The Passion of the Christ* (£11.1 million), followed by *Crouching Tiger, Hidden Dragon* (£9.4 million). There are three Mandarin and three Spanish language films in the top 10, but only one French language title. The top Hindi language release of 2013, *Dhoom: 3* becomes the first Indian film to appear in the list, and is the first new entry to the top 10 since 2007.

Table 5.7 Top 10 non-English language films, 2001-2013

	Title	Language	UK box office total (£ million)	Distributor	Year of release
1	The Passion of the Christ	Aramaic/Latin/Hebrew	11.08	Icon	2004
2	Crouching Tiger, Hidden Dragon	Mandarin	9.37	Sony Pictures	2001
3	Amélie	French/Russian	5.01	Momentum	2001
4	Apocalypto	Mayan	4.11	Icon	2007
5	Hero	Mandarin	3.82	Walt Disney	2004
6	House of Flying Daggers	Mandarin	3.78	Pathé	2004
7	Volver	Spanish	2.88	Pathé	2006
8	The Motorcycle Diaries	Spanish	2.75	Pathé	2004
9	Pan's Labyrinth	Spanish	2.72	Optimum	2006
10	Dhoom: 3	Hindi	2.71	Yash Raj Films	2013

Source: Rentrak, BFI RSU analysis

5.4 Documentaries

A total of 89 feature documentaries were released at the UK box office in 2013, representing 13% of theatrical releases. They earned £11 million which was 0.9% of the overall box office gross. We have split our 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 non-concert documentary of the year was Ken Loach's *The Spirit of '45*, which earned £0.2 million.

Table 5.8 shows the top 20 non-concert documentaries at the UK box office since 2001. No 2013 releases appear in the table. The highest grossing non-concert documentary of all time at the UK box office, Michael Moore's *Fahrenheit 9/11*, grossed £6.5 million in 2004, while 2011 release *Senna* is in second place with £3.2 million. Eight of the top 20 non-concert documentaries since 2001 are UK films.

Table 5.8 Top 20 non-concert feature documentaries at the UK box office, 2001-2013

	Title	Country of origin	Year of release	Box office gross (£ million)	Widest point of release (sites)	Distributor
1	Fahrenheit 9/11	USA	2004	6.55	200	Optimum
2	Senna	UK	2011	3.17	358	Universal
3	March of the Penguins	Fra	2005	3.08	163	Warner Bros
4	Touching the Void	UK	2003	2.64	50	Pathé
5	Bowling for Columbine	USA	2002	1.67	37	Momentum
6	TT3D: Closer to the Edge	UK	2011	1.26	125	CinemaNX
7	The Imposter	UK/USA	2012	1.13	77	Picturehouse/Revolver
8	Super Size Me	USA	2004	1.11	83	Tartan
9	Marley	UK/Jam/USA	2012	0.99	333	Universal
10	An Inconvenient Truth	USA	2006	0.94	68	Paramount
11	Man on Wire	UK/USA	2008	0.88	43	Icon
12	Être et Avoir	Fra	2003	0.71	15	Tartan
13	Pina	Ger/Fra	2011	0.67	26	Artificial Eye
14	Cave of Forgotten Dreams	UK/Can/Fra/Ger/USA	2011	0.62	39	Picturehouse
15	Spellbound	USA	2003	0.48	17	Metrodome
16	The September Issue	USA	2009	0.43	18	Momentum
17	Capturing the Friedmans	USA	2004	0.39	26	Tartan
18	Searching for Sugar Man	UK	2012	0.38	43	StudioCanal
19	Sicko	USA	2007	0.38	166	Optimum
20	Inside Job	USA	2011	0.32	24	Sony Pictures

Source: BFI RSU analysis of Rentrak data

Notes:
The table does not include concert performance documentaries, IMAX-only documentaries and shorts.
Based on box office data for 2001-2013.
Fahrenheit 9/11 is regarded as the highest grossing feature documentary of all time because, with price inflation, it is unlikely that any documentary films before 1989 will have earned more in nominal terms.

A number of concert performance documentaries, mostly now in 3D, are released theatrically every year. Table 5.9 shows the top 10 documentaries in this category since 2008. The highest grossing title released during the period is *Michael Jackson's This Is It*, which earned £9.8 million in 2009. Two 2013 releases feature in the top 10 list – *One Direction: This Is Us* is in second place with box office takings of £8 million and *The Stone Roses: Made of Stone* is 10th with earnings of £0.5 million.

Table 5.9 Top 10 concert documentaries at the UK box office, 2008-2013

	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	9.80	498	Sony Pictures
2	One Direction: This Is Us	UK/USA	2013	8.01	479	Sony Pictures
3	Justin Bieber: Never Say Never	USA	2011	2.32	388	Paramount
4	Katy Perry: Part of Me	USA	2012	1.17	326	Paramount
5	Hannah Montana/Miley Cyrus: Best of Both Worlds Concert	USA	2008	0.80	65	Walt Disney
6	U2 3D	USA	2008	0.73	67	Revolver
7	Glee: The 3D Concert Movie	USA	2011	0.71	335	20th Century Fox
8	Shine a Light	USA/UK	2008	0.70	159	20th Century Fox
9	JLS: Eyes Wide Open 3D	UK	2011	0.51	210	Omniverse
10	The Stone Roses: Made of Stone	UK	2013	0.51	83	Picturehouse Entertainment

Source: BFI RSU analysis of Rentrak data

5.5 Re-releases

In 2013, 42 archive/classic titles were re-released and are considered to be specialised. Three other films, *Finding Nemo, Jurassic Park* and *Monsters, Inc*, previously shown only in 2D were released again in 2013 in the 3D format, but these were considered to be mainstream films rather than specialised (see Section 5.1). According to Rentrak the 42 specialised re-releases accounted for 6% of theatrical releases in 2013 and generated £1.3 million (0.1% of the total gross box office). However, not all box office revenues for re-releases are tracked by Rentrak, 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.

Table 5.10 highlights the top 20 specialised re-releases at UK cinemas over the last 14 years. Stanley Kubrick has three entries in the chart including the all time top non-3D re-release *A Clockwork Orange* which grossed £2.1 million in 2000. His other top 20 re-releases are *2001: A Space Odyssey* in 2001 and *The Shining* in 2012. Two other non-3D re-releases have grossed over £1 million – Steven Spielberg's 20th anniversary re-release of *E.T.* and the 25th anniversary re-release of sci-fi comedy *Back to the Future* in 2010. The highest earning re-release in 2013, with box office takings of £107,028, was *Gone with the Wind*, which was re-issued to celebrate the centenary of the birth of its star, Vivien Leigh.

Table 5.10 Top 20 re-releases at the UK box office, 2000-2013

	Title (year of original release)	Country of origin	Year of re-release	Box office gross (£)	Widest point of release (sites)	Distributor
1	A Clockwork Orange (1972)	UK	2000	2,067,302	328	Warner Bros
2	E.T. (20th anniversary) (1982)	USA	2002	2,063,690	313	UIP
3	Back to the Future (1985)	USA	2010	1,108,766	273	Universal
4	Alien: The Director's Cut (1979)	UK/USA	2003	545,782	134	20th Century Fox
5	Jurassic Park (1993)	USA	2011	511,258	277	Universal
6	Apocalypse Now Redux (1979)	USA	2001	455,335	22	Walt Disney
7	Jaws (1975)	USA	2012	368,286	319	Universal
8	The Leopard (1963)	Ita/Fra	2003	346,807	5	BFI
9	It's a Wonderful Life (1946)	USA	2007	329,891	33	Park Circus
10	2001: A Space Odyssey (1968)	UK/USA	2001	326,496	4	Warner Bros
11	Breakfast at Tiffany's (1961)	USA	2001	313,443	5	BFI
12	The Shining (1980)	UK/USA	2012	209,305	29	BFI
13	Chariots of Fire (1981)	UK	2012	181,063	149	20th Century Fox
14	À bout de souffle (1960)	Fra	2000	173,301	5	Optimum
15	This Is Spinal Tap (1984)	USA	2000	166,203	22	Optimum
16	Amadeus (Director's Cut) (1984)	USA	2002	145,234	8	Warner Bros
17	Raiders of the Lost Ark (1981)	USA	2012	131,625	15	Paramount
18	Ghostbusters (1983)	USA	2011	128,821	73	Park Circus
19	Metropolis (1927)	Ger	2010	128,671	44	Eureka Entertainment
20	The Rocky Horror Picture Show (1975)	UK/USA	2012	120,599	76	20th Century Fox

Source: BFI RSU analysis of Rentrak data

See also:

- For more on the box office see Chapter 1 (page 10)
- For more on 3D films see Chapter 2 (page 21)
- For more on genre and BBFC classification see Chapter 4 (page 34)

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 6

UK films internationally

UK qualifying films earned over 11% of global box office receipts in 2013. Fast & Furious 6 *was the top earning UK film worldwide with earnings of $788 million, while* Red 2 *was the highest grossing independent UK title with takings of $142 million.*

FACTS IN FOCUS:

The global theatrical market was worth almost $36 billion in 2013; UK films earned $4.1 billion (11.4%), down from $5.3 billion (15%) in 2012.

Independent UK films accounted for 1.6% of the global theatrical market, at a value of just over $649 million.

UK films represented 8% of releases at the North American box office (9% in 2012), and 12% of the market (down from 16% in 2012), at a value of $1,292 million.

In the European Union (EU), not including the UK and Republic of Ireland, the top UK film was *Fast & Furious 6* with nearly 14 million admissions. More than three million tickets were sold for *Rush*, the top UK independent film.

Six of the top 20 UK films released in the EU (excluding the UK and Republic of Ireland) were independent titles.

6.1 UK films worldwide

UK films earned a combined worldwide gross of $4.1 billion in 2013, an 11.4% share of the global box office, which hit a new record of $35.7 billion (Table 6.1). The 2013 global gross for UK films was the lowest since 2009.

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 9.8% of the worldwide box office in 2013, with earnings of $3.4 billion, down from $4.6 billion in 2012. UK independent films earned 1.6% of global revenues with a gross box office of just over $649 million, up from $625 million in 2012. 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 15.5% share of the box office and UK independent films had 6.6%).

Table 6.1 UK films global market share, 2002-2013

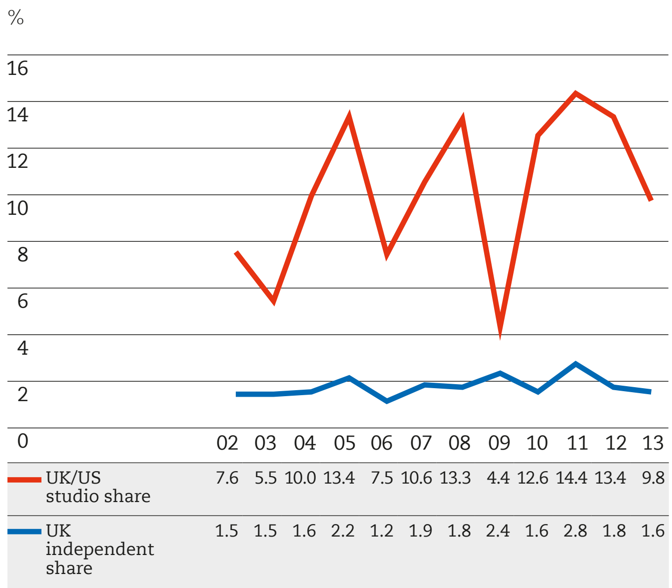
Year	UK films worldwide gross (US$ billion)	Global theatrical market (US$ billion)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)
2002	1.8	19.8	9.1	7.6	1.5
2003	1.4	20.1	6.9	5.5	1.5
2004	2.9	24.9	11.6	10.0	1.6
2005	3.6	23.1	15.5	13.4	2.2
2006	2.2	25.5	8.6	7.5	1.2
2007	3.3	26.3	12.5	10.6	1.9
2008	4.2	27.8	15.1	13.3	1.8
2009	2.0	29.4	6.8	4.4	2.4
2010	4.5	31.8	14.2	12.6	1.6
2011	5.6	32.6	17.2	14.4	2.8
2012	5.3	34.7	15.3	13.4	1.8
2013	4.1	35.7	11.4	9.8	1.6

Source: BFI, Rentrak, MPAA, IHS

* 'Studio-backed' means backed by one of the major US film studios.

As Figure 6.1 shows, the UK/US studio market share fluctuates significantly from year to year and is highly dependent on the performance of a small number of titles. The peak in 2011 was largely due to two hugely successful releases: *Harry Potter and the Deathly Hallows: Part 2* ($1.3 billion) and *Pirates of the Caribbean: On Stranger Tides* ($1 billion). The share for UK independent films has stayed around 2% over time; the increase in market share of independent UK films in 2011 was mainly due to the success of one title, *The King's Speech*, which grossed $389 million worldwide ($414 million including 2010 earnings). In 2012, the UK independent market share fell by one percentage point from 2011's record level, and this was followed by another slight fall in 2013.

Figure 6.1 UK films global market share, 2002-2013



Source: BFI

The highest grossing UK qualifying film of 2013 was *Fast & Furious 6*, which earned $788 million worldwide, followed by *Gravity* which grossed $670 million (Table 6.2). There were three independent UK films (*Red 2, Philomena* and *Rush*) in the list of top 10 earning UK films in 2013, one more than in 2012.

Table 6.2 Top 10 UK qualifying films worldwide, 2013

	Title	Country of origin	Worldwide gross (US$ million)
1	Fast & Furious 6	UK/USA	788
2	Gravity	UK/USA	670
3	Thor: The Dark World	UK/USA	632
4	World War Z	UK/USA	540
5	Jack the Giant Slayer	UK/USA	198
6	Red 2	UK/USA	142
7	Les Misérables	UK/USA	98
8	47 Ronin	UK/USA/Hun	94
9	Philomena	UK	89
10	Rush	UK/Ger/USA	88
Total			**3,338**

Source: BFI RSU

Notes:
Worldwide gross includes the UK and Republic of Ireland.
Table based on gross box office revenue in the 2013 calendar year.
Figures may not sum to total due to rounding.

The highest grossing UK independent film in 2013 was *Red 2* which earned $142 million worldwide (Table 6.3). This was the only independent UK title to earn over $100 million at the global box office in 2013, compared with two in 2012: *The Best Exotic Marigold Hotel* ($135 million) and *The Woman in Black* ($126 million).

Table 6.3 Top 10 UK independent films worldwide, 2013

	Title	Country of origin	Worldwide gross (US$ million)
1	Red 2	UK/USA#	142
2	Philomena	UK	89
3	Rush	UK/Ger/USA#	88
4	Quartet	UK	58
5	I Give It a Year	UK/Fra/Ger	28
6	Mandela: Long Walk to Freedom	UK/SA	27
7	Diana	UK/Bel/Fra	22
8	Song for Marion	UK	10
9	Alan Partridge: Alpha Papa	UK	10
10	Sunshine on Leith	UK	7
Total			**483**

Source: BFI RSU

Notes:
Worldwide gross includes the UK and Republic of Ireland.
Table based on gross box office revenue in the 2013 calendar year.
Figures may not sum to total due to rounding.
Red 2 and *Rush* were made with independent (non-studio) US support.

6.2 UK films in North America

Table 6.4 shows the countries of origin of films released in the USA and Canada in 2013. The UK share of the gross box office was 11.9% (16.2% in 2012) with UK films representing 8% of releases in the North American market (9% in 2012). The total revenue from these films stood at $1,292 million, down from $1,737 million in 2012. UK independent films grossed $150 million, a 1.4% share from 6% of releases (41 films).

Table 6.4 Country of origin of films released in the USA and Canada, 2013

Country of origin	Number of releases	% of releases	Box office (US$ million)	Box office share (%)
UK independent films	41	6	150	1.4
UK studio-backed films*	14	2	1,143	10.5
UK films total	55	8	1,292	11.9
USA	396	60	9,354	86.1
Rest of the world	213	32	212	2.0
Total	**664**	**100**	**10,859**	**100.0**

Source: Rentrak, BFI RSU analysis

Notes:
Figures may not sum to totals/sub-totals due to rounding.
* 'Studio-backed' means backed by one of the major US film studios.

As with the share of the global market, the market share for UK films in North America has fluctuated greatly over the last 12 years depending on the performance of a very small number of titles (Table 6.5). The overall UK share in 2013 decreased by more than four percentage points compared with 2012 and was the lowest since 2009, but the share of UK independent films decreased only very slightly from 1.5% in 2012 to 1.4%.

Table 6.5 UK market share in North America, 2002-2013

Year	Total UK share (%)	UK/US studio-backed 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

Source: Rentrak, BFI RSU analysis

Gravity was the top performing UK qualifying film in North America in 2013 earning $268 million, followed by *Fast & Furious 6* with $239 million (Table 6.6). There were seven independent UK films in the top 20, one more than in 2012. The top performing UK independent title was *Red 2* with $53 million.

Table 6.6 Top 20 UK films at the USA and Canada box office (including co-productions), 2013

	Title	Country of origin	Box office gross (US$ million)	US distributor
1	Gravity	UK/USA	268.2	Warner Bros
2	Fast & Furious 6	UK/USA	238.7	Universal
3	Thor: The Dark World	UK/USA	205.5	Walt Disney
4	World War Z	UK/USA	202.4	Paramount
5	Jack the Giant Slayer	UK/USA	65.2	Warner Bros
6	Red 2	UK/USA#	53.3	Summit Entertainment
7	47 Ronin	UK/USA/Hun	38.4	Universal
8	Philomena	UK	30.9	The Weinstein Company
9	One Direction: This Is Us	UK/USA	28.9	Sony Pictures
10	Kick-Ass 2	UK/USA	28.8	Universal
11	Rush	UK/Ger/USA#	26.9	Universal
12	The World's End	UK/USA	26.0	Focus Features
13	Quartet	UK	18.4	The Weinstein Company
14	The Counsellor	UK/USA	17.0	20th Century Fox
15	About Time	UK/USA	15.0	Universal
16	Mandela: Long Walk to Freedom	UK/SA	8.2	The Weinstein Company
17	Closed Circuit	UK/USA	5.8	Focus Features
18	Trance	UK/USA	2.3	Fox Searchlight
19	The Christmas Candle	UK/USA#	2.3	EchoLight Studios
20	Austenland	UK/USA#	2.2	Sony Pictures Classics

Source: Rentrak, BFI RSU analysis

Notes:
Table lists the gross box office for films released in the USA and Canada in 2013 and includes 2014 earnings up to 16 February 2014.
Red 2, *Rush*, *The Christmas Candle* and *Austenland* were made with independent (non-studio) US support.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

6.3 UK films in Europe

Outside the UK and Republic of Ireland, the market share for UK films in other major European territories, including Russia, ranged from a high of just under 16% in Portugal (including 2.6% for UK independent films) to under 10% in France and Germany (Table 6.7). The largest market shares for UK independent films were recorded in Austria (3.9%) and Italy (3.8%) where *Rush* was the top independent title.

Table 6.7 UK market share in selected European territories, 2013

Territory	Box office for UK films (€ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top independent UK film
Austria	14.8	11.9	8.1	3.9	Rush
France	18.3m admissions	9.9	8.1	1.8	Red 2
Germany	95.0	9.6	8.0	1.7	Rush
Italy	67.7	11.0	7.3	3.8	Rush
Netherlands	24.6	11.0	9.6	1.3	Red 2
Portugal	10.7	15.7	13.0	2.6	Diana
Russia	5,203m RUB	11.9	10.3	1.6	Red 2
Spain	61.6	12.2	10.4	1.7	Red 2

Source: Rentrak, BFI RSU analysis

Notes:
* ‘Studio-backed’ means backed by one of the major US film studios.

The most popular UK film in EU countries (other than the UK and Republic of Ireland) in 2013 was *Fast & Furious 6* with nearly 14 million admissions (Table 6.8). *Rush* recorded the most admissions for an independent UK film in the EU with more than three million ticket sales. Six of the top 20 were UK independent films, one fewer than in 2012.

Table 6.8 Top 20 UK films in other EU countries, 2013

	Title	Country of origin	European admissions (million)
1	Fast & Furious 6	UK/USA	13,669,787
2	Gravity	UK/USA	9,255,344
3	World War Z	UK/USA	8,928,908
4	Thor: The Dark World	UK/USA	7,585,087
5	Rush	UK/Ger/USA	3,117,058
6	Les Misérables	UK/USA	2,716,758
7	Red 2	UK/USA	2,205,925
8	Jack the Giant Slayer	UK/USA	1,685,596
9	I Give It a Year	UK/Fra/Ger	1,494,078
10	The Counsellor	UK/USA	1,475,723
11	Quartet	UK	1,213,633
12	Diana	UK/Fra/Bel	1,084,591
13	Kick-Ass 2	UK/USA	1,052,028
14	Anna Karenina*	UK/USA	1,026,367
15	About Time	UK/USA	992,576
16	Skyfall*	UK/USA	884,552
17	One Direction: This Is Us	UK/USA	750,553
18	Philomena	UK	559,935
19	Trance	UK/USA	430,485
20	47 Ronin	UK/USA/Hun	391,334

Source: European Audiovisual Observatory Lumière Database

Notes:
Data based on admissions from EU countries (excluding the UK and Republic of Ireland) in the 2013 calendar year.
* *Skyfall* and *Anna Karenina* were released in 2012, the chart only covers admissions figures for 2013.

6.4 UK films in Latin America

UK films earned between 12% and 15% of the box office in the Latin American territories for which data are available (Table 6.9). UK/US studio-backed titles *Fast & Furious 6*, *Thor: The Dark World* and *World War Z* were the top earners in these territories. The top performing independent UK titles were *Quartet*, *Red 2*, *Rush* and *Saving Santa*.

Table 6.9 UK market share in selected Latin American countries, 2013

Territory	Box office for UK films (US$ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
Argentina	56.9	13.2	12.7	0.5	Quartet
Brazil	114.1	12.1	11.4	0.7	Red 2
Chile	17.2	14.4	14.3	0.1	Red 2
Colombia	24.9	14.1	13.6	0.6	Red 2
Mexico	137.3	14.7	14.1	0.7	Rush
Venezuela	53.0	13.1	12.0	1.1	Saving Santa

Source: Rentrak, BFI RSU analysis

* 'Studio-backed' means backed by one of the major US film studios.

6.5 UK films in Asia

Gravity was the highest grossing UK film in Japan in 2013 and the second highest in both China and South Korea. *Fast & Furious 6* was the top earning UK title in China, while *World War Z* was the top earner in South Korea. For all three territories the highest grossing UK independent film was *Red 2* (Table 6.10).

Table 6.10 UK market share in China, Japan and South Korea, 2013

Territory	Box office for UK films (US$ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
China	266.0	8.1	7.8	0.4	Red 2
Japan	115.7	5.7	4.9	0.8	Red 2
South Korea	143.4	11.0	9.2	1.8	Red 2

Source: Rentrak, BFI RSU analysis

* 'Studio-backed' means backed by one of the major US film studios.

6.6 UK films in Australasia

Fast & Furious 6 was the highest grossing UK film in both Australasian territories in 2013, with *Thor: The Dark World* second in Australia and *Gravity* second in New Zealand. *Philomena* was the top grossing UK independent film in both territories (Table 6.11).

Table 6.11 UK market share in Australia and New Zealand, 2013

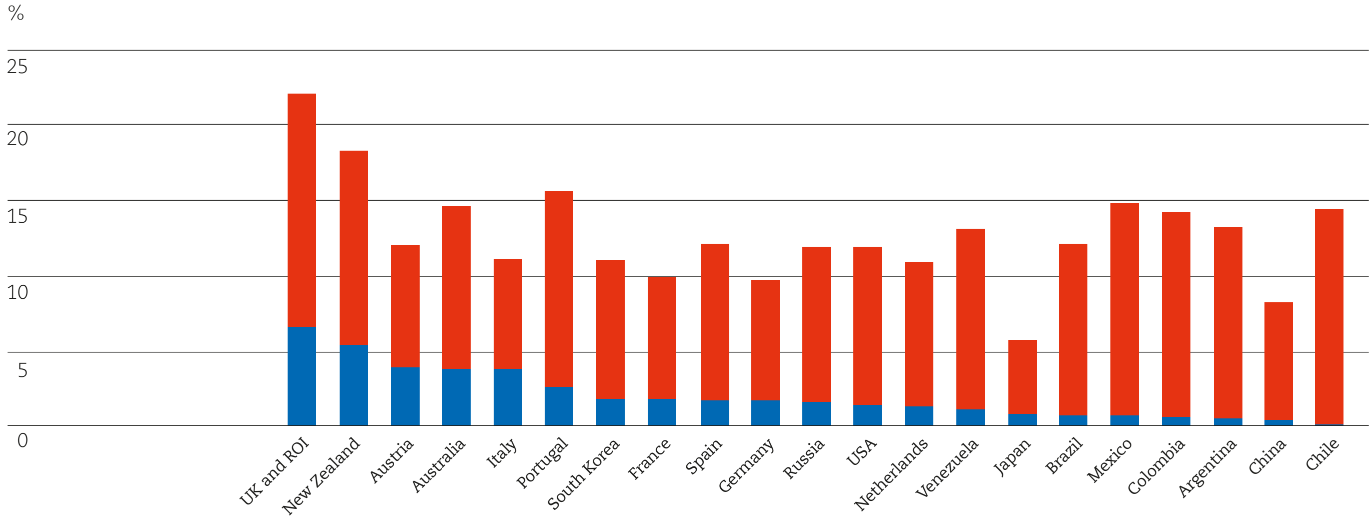
Territory	Box office for UK films (US$ million)	UK share (%)	UK studio-backed films share* (%)	UK independent films share (%)	Top UK independent film
Australia	146.5	14.6	10.8	3.8	Philomena
New Zealand	22.0	18.3	12.9	5.4	Philomena

Source: Rentrak, BFI RSU analysis

* ‘Studio-backed’ means backed by one of the major US film studios.

Figure 6.2 shows the market share of UK films for the territories shown in Tables 6.4, 6.7, 6.9, 6.10 and 6.11. The UK and Republic of Ireland is also included to provide a comparison. The territories are listed in order of market share of UK independent films. Although its overall UK market share was only the thirteenth highest of all the territories (including the UK and Republic of Ireland) Austria, at 3.9%, had the third highest UK independent market share. Two thirds of the box office for UK independent films in Austria in 2013 was accounted for by *Rush*, the film about the rivalry between Formula One racing drivers James Hunt and Austrian Niki Lauda.

Figure 6.2 UK market share in 21 territories, 2013 (in order of market share of UK independent films)



UK studio-backed*	15.5	12.9	8.1	10.8	7.3	13.0	9.2	8.1	10.4	8.0	10.3	10.5	9.6	12.0	4.9	11.4	14.1	13.6	12.7	7.8	14.3
UK independent	6.6	5.4	3.9	3.8	3.8	2.6	1.8	1.8	1.7	1.7	1.6	1.4	1.3	1.1	0.8	0.7	0.7	0.6	0.5	0.4	0.1
Total UK market share	**22.2**	**18.3**	**11.9**	**14.6**	**11.0**	**15.7**	**11.0**	**9.9**	**12.2**	**9.6**	**11.9**	**11.9**	**11.0**	**13.1**	**5.7**	**12.1**	**14.7**	**14.1**	**13.2**	**8.1**	**14.4**

Source: Rentrak, BFI RSU analysis

* ‘Studio-backed’ means backed by one of the major US film studios.

Note: Definition of ‘UK film’

For the purposes of this chapter, a UK 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 British on the basis of its content, producers, finance and talent. Most UK films in the analysis (including the major studio-backed films) fall into the first group – films officially certified as British.

- For more on the performance of UK films at the UK box office see Chapter 1 (page 10)
- For more on the UK and global market for filmed entertainment see Chapter 14 (page 151)
- For more on the UK film economy see Chapter 21 (page 220)

Image: 12 *Years a Slave* courtesy of eOne Films

Chapter 7

UK talent and awards

UK actors, directors and writers consistently win acclaim at the global box office and international award ceremonies. In 2013, UK talent and story material continued to reach enthusiastic audiences and showcase our culture and identity to the world.

FACTS IN FOCUS:

Of the top 200 global box office successes of 2001-2013, 32 films are based on stories and characters created by UK writers. Together they have earned more than $23 billion (£15 billion) at the worldwide box office.

Eight of the top 20 global box office successes of the last 13 years are based on novels by UK writers.

Nearly two thirds of the top 200 films released worldwide since 2001 have featured UK actors in lead or prominent supporting roles.

UK directors were behind 26 of the 200 biggest films of the last 13 years with Harry Potter director, David Yates, topping the box office league.

UK films and talent won 26 major film awards in 2013/14, including six Oscars® and 13 BAFTAs. Steve McQueen's *12 Years a Slave* won the best film award at both ceremonies.

7.1 UK story 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 2013, 37 are UK qualifying films, and UK-originated story material provided the inspiration for 32 films, a feat bettered only by US story material. Collectively these 32 films have earned $23.3 billion (£14.9 billion at the 2013 average exchange rate) at the global box office.

Novels by British writers have provided the source material for eight of the top 20 grossing films worldwide since 2001 (Table 7.1). Also appearing in the top 20 are *The Dark Knight* and *The Dark Knight Rises* which feature the character Batman created by American Bob Kane, but the stories for these two films were written by British director/writer Christopher Nolan.

Table 7.1 Top 20 grossing films worldwide, 2001-2013

Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK story material (writer)
1	Avatar	USA	2,782	20th Century Fox	
2	Marvel Avengers Assemble	USA	1,518	Walt Disney	
3	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,328	Warner Bros	Novel by JK Rowling
4	Iron Man 3	USA/China	1,215	Walt Disney	
5	Transformers: Dark of the Moon	USA	1,123	Paramount	
6	The Lord of the Rings: The Return of the King	USA/NZ	1,119	New Line	Novel by JRR Tolkien
7	Skyfall	UK/USA	1,108	MGM/Columbia/ Sony	Based on novels by Ian Fleming
8	The Dark Knight Rises	UK/USA	1,081	Warner Bros	
9	Pirates of the Caribbean: Dead Man's Chest	USA	1,065	Buena Vista	
10	Toy Story 3	USA	1,064	Walt Disney	
11	Pirates of the Caribbean: On Stranger Tides	UK/USA	1,044	Walt Disney	
12	Alice in Wonderland	USA	1,024	Walt Disney	Novel by Lewis Carroll
13	The Hobbit: An Unexpected Journey	USA/NZ	1,019	Warner Bros	Novel by JRR Tolkien
14	The Dark Knight	UK/USA	1,002	Warner Bros	
15	Harry Potter and the Philosopher's Stone	UK/USA	974	Warner Bros	Novel by JK Rowling
16	Despicable Me 2	USA	970	Universal Pictures	
17	Pirates of the Caribbean: At World's End	USA	961	Walt Disney	
18	Frozen	USA	956	Walt Disney	
19	Harry Potter and the Deathly Hallows: Part 1	UK/USA	955	Warner Bros	Novel by JK Rowling
20	Harry Potter and the Order of the Phoenix	UK/USA	939	Warner Bros	Novel by JK Rowling

Source: BFI RSU

Looking just at films based on UK story material, the top 20 grossing films adapted from stories or characters created by UK writers are listed in Table 7.2. Eighteen are adaptations of novels by UK authors, one is based on a successful stage production and one is from an original screenplay.

Table 7.2 Top 20 grossing films worldwide based on stories and characters created by UK writers, 2001-2013

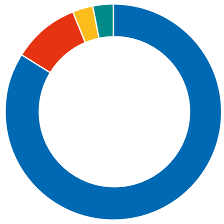
Rank	Title	Country of origin	Gross box office (US$ million)	US distributor	UK story material (writer)
1	Harry Potter and the Deathly Hallows: Part 2	UK/USA	1,328	Warner Bros	Novel by JK Rowling
2	The Lord of the Rings: The Return of the King	USA/NZ	1,119	New Line	Novel by JRR Tolkien
3	Skyfall	UK/USA	1,108	MGM/Columbia/ Sony	Based on novels by Ian Fleming
4	Alice in Wonderland	USA	1,024	Walt Disney	Novel by Lewis Carroll
5	The Hobbit: An Unexpected Journey	USA/NZ	1,019	Warner Bros	Novel by JRR Tolkien
6	Harry Potter and the Philosopher's Stone	UK/USA	974	Warner Bros	Novel by JK Rowling
7	Harry Potter and the Deathly Hallows: Part 1	UK/USA	955	Warner Bros	Novel by JK Rowling
8	Harry Potter and the Order of the Phoenix	UK/USA	939	Warner Bros	Novel by JK Rowling
9	Harry Potter and the Half-Blood Prince	UK/USA	934	Warner Bros	Novel by JK Rowling
10	The Lord of the Rings: The Two Towers	USA/NZ	923	New Line	Novel by JRR Tolkien
11	Harry Potter and the Goblet of Fire	UK/USA	893	Warner Bros	Novel by JK Rowling
12	Harry Potter and the Chamber of Secrets	UK/USA	877	Warner Bros	Novel by JK Rowling
13	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	868	New Line	Novel by JRR Tolkien
14	The Hobbit: The Desolation of Smaug	USA/NZ	859	Warner Bros	Novel by JRR Tolkein
15	Inception	UK/USA	826	Warner Bros	Original screenplay by Christopher Nolan
16	Harry Potter and the Prisoner of Azkaban	UK/USA	789	Warner Bros	Novel by JK Rowling
17	The Chronicles of Narnia: The Lion, the Witch and the Wardrobe	USA/NZ	745	Walt Disney	Novel by CS Lewis
18	Mamma Mia!	UK/USA	602	Universal	Musical book and screenplay by Catherine Johnson
19	Casino Royale	UK/USA/ Cze	600	Columbia/Sony	Novel by Ian Fleming
20	The War of the Worlds	USA	596	Paramount	Novel by HG Wells

Source: BFI RSU

Of the 32 films from the top 200 based on UK stories and characters, the majority (88%) were based on the work of new and classic authors such as Ian Fleming, CS Lewis, JK Rowling and JRR Tolkien (Figure 7.1). One new film appears in the list, *The Hobbit: The Desolation of Smaug*, based on the book by JRR Tolkien. None of the other 2013 films added to the top 200 are based on UK story material.

Figure 7.1 Origin of UK story material in the top 200 films at the international box office, 2001-2013

	%
Novel	88
Original Screenplay	6
Comic book/graphic novel	3
Musical	3



Source: BFI RSU

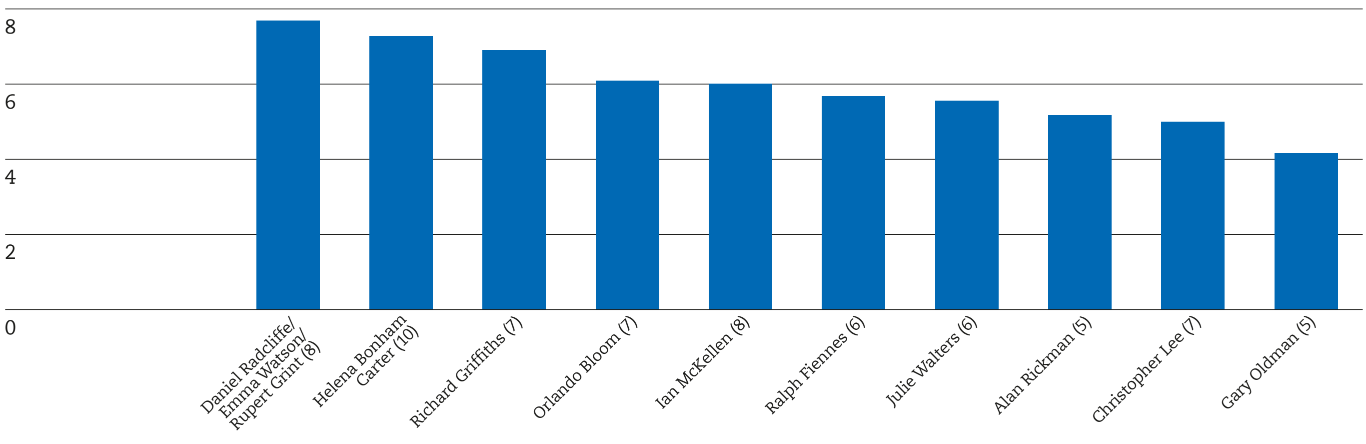
7.2 UK actors

UK acting talent is widely recognised as being among the best in the world and nearly two thirds (126) of the top 200 films at the international box office since 2001 have featured British actors in either lead/title roles (52) or in the supporting cast (74). The prominent role played by UK actors in many of the most successful blockbusters of the last 13 years is reflected in Figure 7.2, which shows the top 12 British actors based on appearances in the top 200 films and ranked by total box office gross. The Harry Potter films feature heavily in this chart.

At the top of the list are the regular stars of the Harry Potter franchise (only the three main performers are shown in Figure 7.2 but several others have appeared in many of the films). Second in the list is Helena Bonham Carter who has appeared in 10 of the top 200 films, including four Harry Potter films, *The King's Speech* and *Les Misérables*. In third place is the late Richard Griffiths who appeared in six Harry Potter films as well as *Pirates of the Caribbean: On Stranger Tides*. Orlando Bloom is in fourth place due to his appearances in all three Lord of the Rings films, three Pirates of the Caribbean films and *Troy*. Ian McKellen is fifth thanks to appearances in eight of the top 200 films including the Lord of the Rings franchise, the two Hobbit films and three X-Men films.

Ralph Fiennes, Julie Walters and Alan Rickman all appear in the list following their roles in Harry Potter films. All three have also appeared in at least one other top 200 film including respectively *Skyfall*, *Mamma Mia!* and *Alice in Wonderland*. Christopher Lee has appeared in many of the same successful franchise films as Ian McKellen, but did not appear in *The Hobbit: The Desolation of Smaug* and so is lower down the list in ninth place and Gary Oldman is in the tenth spot following roles in two Harry Potter films, the two Dark Knight films and *Hannibal*.

Figure 7.2 Top 12 UK actors featured in the top 200 films at the worldwide box office, 2001-2013 (number of appearances in brackets)



Total gross box office (US$ billion)	7.69	7.24	6.91	6.09	5.93	5.72	5.67	5.18	5.15	4.16

Source: BFI RSU

Note: Includes actors who have made four or more appearances in the top 200 films, either in lead/title role or supporting role (not including voices in animated films).

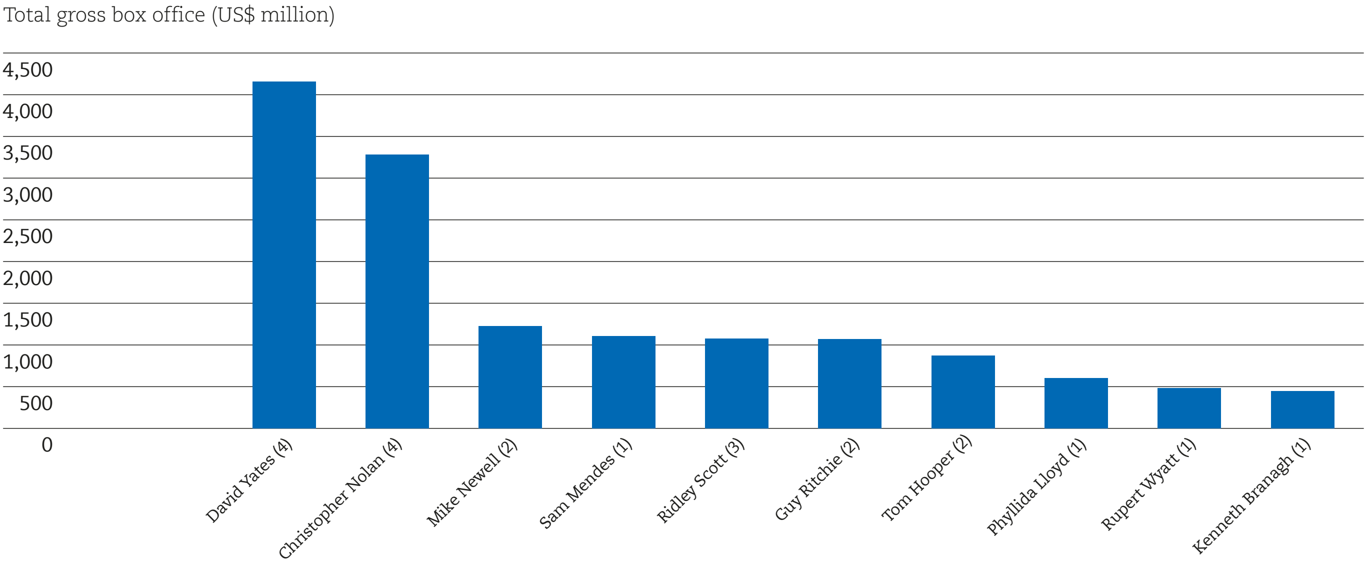
7.3 UK directors

Twenty-six of the 200 highest grossing films at the worldwide box office between 2001 and 2013 were helmed by British directors (Figure 7.3 and Table 7.3). This is one fewer than in the top 200 films of 2001-2012. None of the 2013 releases which entered the top 200 had a British director, and Simon West's *The Expendables 2* dropped out of the top 200.

David Yates's four Harry Potter films (*Harry Potter and the Order of the Phoenix, Harry Potter and the Half-Blood Prince* and *Harry Potter and the Deathly Hallows: Parts 1 and 2*) have made him the most commercially successful British director in recent years, with total top 200 box office takings of $4.16 billion. Christopher Nolan is second having directed *Batman Begins, The Dark Knight, Inception* and *The Dark Knight Rises* which earned a total of $3.28 billion. In third place is Mike Newell who directed *Harry Potter and the Goblet of Fire* and *Prince of Persia: The Sands of Time*, which together grossed $1.23 billion. Sam Mendes is at number four due to *Skyfall*'s worldwide gross of $1.11 billion, while Ridley Scott is in fifth place with three films (*Robin Hood, Hannibal* and *Prometheus*) which together grossed over $1.07 billion. Only one British woman features in the top 200: Phyllida Lloyd is eighth on the list with a worldwide gross of $602 million for *Mamma Mia!*.

There are two UK independent films in the top 200. These are Tom Hooper's *The King's Speech* (with a worldwide gross of $414 million) and Danny Boyle's *Slumdog Millionaire* ($377 million). The combined earnings of *The King's Speech* and the studio-backed *Les Misérables* (which was released in the USA in 2012 and the UK in 2013) place Tom Hooper at number seven on the list with $856 million while Danny Boyle is at number 14.

Figure 7.3 Top 10 UK directors based on top 200 grossing films at the global box office, 2001-2013 (number of films in brackets)



	David Yates (4)	Christopher Nolan (4)	Mike Newell (2)	Sam Mendes (1)	Ridley Scott (3)	Guy Ritchie (2)	Tom Hooper (2)	Phyllida Lloyd (1)	Rupert Wyatt (1)	Kenneth Branagh (1)
Worldwide gross from films in top 200 (US$ million)	4,156	3,280	1,228	1,108	1,074	1,068	856	602	483	448

Source: BFI RSU

Table 7.3 UK directors from the top 200 films at the global box office and their films, 2001-2013

Director	Film(s)	Total gross box office (US$ million)
David Yates	Harry Potter and the Deathly Hallows: Part 2	
	Harry Potter and the Deathly Hallows: Part 1	
	Harry Potter and the Order of the Phoenix	
	Harry Potter and the Half-Blood Prince	4,156
Christopher Nolan	The Dark Knight Rises	
	The Dark Knight	
	Inception	
	Batman Begins	3,280
Mike Newell	Harry Potter and the Goblet of Fire	
	Prince of Persia: The Sands of Time	1,228
Sam Mendes	Skyfall	1,108
Ridley Scott	Prometheus	
	Hannibal	
	Robin Hood	1,074
Guy Ritchie	Sherlock Holmes: A Game of Shadows	
	Sherlock Holmes	1,068
Tom Hooper	Les Misérables	
	The King's Speech	856
Phyllida Lloyd	Mamma Mia!	602
Rupert Wyatt	Rise of the Planet of the Apes	483
Kenneth Branagh	Thor	448
Paul Greengrass	The Bourne Ultimatum	443
Michael Apted	The Chronicles of Narnia: The Voyage of the Dawn Treader	416
Rupert Sanders	Snow White and the Huntsman	397
Danny Boyle	Slumdog Millionaire	377
Matthew Vaughn	X-Men: First Class	353

Source: BFI RSU

7.4 Writers and directors of UK independent films released in the UK, 2003-2013

We have information on 1,135 writers and 876 directors associated with UK independent films released in the UK between 2003 and 2013 (not including re-releases of classic films). Almost 90% of writers and over 80% of directors have been associated with just one UK independent film during this time, which illustrates how difficult it is to sustain a writing or directing career (Tables 7.4 and 7.5). However, as we are looking just at UK independent films released between 2003 and 2013 it is possible that some directors and writers were involved with more films than these figures indicate. Some might have been involved with earlier films and others will have made successful independent films and gone on to work on studio-backed films. 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. Tom Hooper 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 King's Speech*, the all time highest grossing independent UK film at both the UK and worldwide box office. In addition, he has directed two studio-backed UK films, *The Damned United* and the top UK film of 2013, *Les Misérables*.

The writers who have been involved with the most independent UK films between 2003 and 2013, with six each, are Noel Clarke, Tony Grisoni, Ronald Harwood and Paul Laverty. Frank Cottrell Boyce, Paul Andrew Williams and Michael Winterbottom have both written or co-written the screenplays for five films and writers involved with four films include Simon Beaufoy, Anders Thomas Jensen and Nick Love.

The director of the most UK independent films released between 2003 and 2013 was Michael Winterbottom with nine films followed by Ken Loach with eight films and Stephen Frears with six films. Filmmakers who have directed five films include Marc Evans, Kevin Macdonald and Shane Meadows.

Table 7.4 Numbers of films written by writers of UK independent films, release years 2003-2013

Number of films written or co-written	Number of writers	% of writers
1	985	86.8
2	93	8.2
3	43	3.8
4	7	0.6
5	3	0.3
6	4	0.4
Total	**1,135**	**100.0**

Source: Rentrak, BFI RSU analysis

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

Table 7.5 Numbers of films directed by filmmakers of UK independent films, release years 2003-2013

Number of films directed or co-directed	Number of directors	% of directors
1	721	82.3
2	113	12.9
3	22	2.5
4	11	1.3
5	6	0.7
6	1	0.1
8	1	0.1
9	1	0.1
Total	**876**	**100.0**

Source: Rentrak, BFI RSU analysis

7.5 Awards for UK films and talent

This section presents the awards won by British talent and UK films at the major film festivals and award ceremonies in the 2013/14 awards cycle. The festivals included here are the Sundance, Berlin, Cannes, Venice and Toronto festivals of 2013 and the BAFTA Film Award and Academy Award® ceremonies which took place in 2014.

However, Table 7.6 also shows the number of awards won in calendar year 2013, in order to provide a comparison with previous years. UK films and British individuals won 26 awards in calendar year 2013 and, as there were exactly the same number of British winners at the BAFTAs and Oscars® in both 2013 and 2014 (13 BAFTAs and six Oscars®), there were also 26 British award winners during the 2013/14 awards cycle. The 26 awards won in both calendar year 2013 and the 2013/14 awards cycle represent 15% of the awards available to UK films and British talent (14% in calendar year 2012). Over the period 2001 to 2013 UK films and talent won 14% of available awards (awards specific to foreign nationals or films, for example the Toronto International Film Festival's award for Best Canadian Film, are not included in the present analysis).

Of the 26 awards presented to British films and talent in calendar year 2013, a total of 10 were won or shared by British women or won by British films made by women, including both a BAFTA and Oscar® for Costume Design on *Anna Karenina* awarded to Jacqueline Durran and a BAFTA for Production Design awarded to Eve Stewart and Anna Lynch-Robinson for *Les Misérables*. (In 2012, seven of the 23 awards were won or shared by women.)

Table 7.6 Numbers of UK award winners, 2001–2013/14

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	26	15
Total (to end of 2013)	**344**	**15**
2013/14 award cycle	*26*	*15*

Source: BFI

Table 7.7 lists the awards won by UK films and British talent at the major festivals in 2013 and at the 2014 BAFTA Film Awards and Academy Awards®.

British feature documentary films and filmmakers won acclaim at the Sundance Film Festival in 2013 taking three prizes – the Special Jury Prize (*Pussy Riot: A Punk Prayer*), Cinematography Award (*Who is Dayani Cristal?*) and Editing Award (*The Summit*) – while Sean Ellis's crime thriller *Metro Manila* won the Audience Award. Three further prizes were awarded to UK films and filmmakers at festivals in 2013. Steve Coogan and Jeff Pope won the Best Screenplay award at Venice, Clio Barnard's *The Selfish Giant* was awarded the Europa Cinemas Label for Best European Film at Cannes, and Steve McQueen's *12 Years a Slave* won the People's Choice Award at Toronto.

British films and talent won 13 awards at the BAFTAs in 2014. *Gravity* won four BAFTAs including Best Sound, Special Visual Effects and Outstanding British Film, while *12 Years a Slave* won both Best Film and Leading Actor. These two films were also leading contenders at the Academy Awards®, where *12 Years a Slave* won Best Picture and *Gravity* had five wins including Sound Editing, Sound Mixing and Visual Effects.

For the third year in succession both the Sound Mixing award at the Oscars® and the Sound award at the BAFTAs have gone to British talent (for the same films at both ceremonies). John Midgeley shared the awards for *Hugo* in 2012, while Andy Nelson, Mark Paterson and Simon Hayes (with Jonathan Allen, Lee Walpole and John Warhurst also included in the BAFTA) won for *Les Misérables* in 2013. In 2014, Christopher Benstead, Chris Munro and Glenn Freemantle won the BAFTA for *Gravity*, while Christopher Benstead and Chris Munro won the Oscar®. (Glenn Freemantle separately won the Oscar® for Sound Editing.)

Table 7.7 UK award winners, 2013/14

Award ceremony/festival	Award	Recipient	Title
Sundance Film Festival 17-27 January 2013	Special Jury Prize – World Cinema: Documentary	Film Award presented to Mike Lerner and Maxim Pozdorovkin	Pussy Riot: A Punk Prayer
	Cinematography Award – World Cinema: Documentary	Marc Silver (with Pau Esteve Birba)	Who is Dayani Cristal?
	Audience Award – World Cinema: Dramatic	Film Award presented to Sean Ellis	Metro Manila
	Editing Award – World Cinema: Documentary	Ben Stark	The Summit
Cannes Film Festival 15-26 May 2013	Europa Cinemas Label – Best European Film	Film Award presented to Clio Barnard	The Selfish Giant
Venice Film Festival 28 August-7 September 2013	Best Screenplay	Steve Coogan and Jeff Pope	Philomena
Toronto Film Festival 5-15 September 2013	People's Choice Award	Film Award presented to Steve McQueen	12 Years a Slave
BAFTA Film Awards 16 February 2014	Adapted Screenplay	Steve Coogan and Jeff Pope	Philomena
	British Short Animation	Film Award presented to James Walker, Sarah Woolner and Yousif Al-Khalifa	Sleeping with the Fishes
	British Short Film	Film Award presented to James W. Griffiths and Sophie Venner	Room 8
	EE Rising Star	Will Poulter	
	Fellowship	Dame Helen Mirren	
	Film	Film Award presented to Anthony Katagas, Brad Pitt, Dede Gardner, Jeremy Kleiner and Steve McQueen	12 Years a Slave
	Leading Actor	Chiwetel Ejiofor	12 Years a Slave
	Original Music	Steven Price	Gravity

Award ceremony/festival	Award	Recipient	Title
BAFTA Film Awards 16 February 2014	Outstanding British Contribution to Cinema	Peter Greenaway	
	Outstanding British Film	Film Award presented to Alfonso Cuarón, David Heyman and Jonás Cuarón	Gravity
	Outstanding Debut by a British Writer, Director or Producer	Kieran Evans (Director and Writer)	Kelly + Victor
	Sound	Glenn Freemantle, Christopher Benstead and Chris Munro (with Skip Lievsay and Niv Adiri)	Gravity
	Special Visual Effects	Tim Webber, Chris Lawrence, Neil Corbould and Nikki Penny (with David Shirk)	Gravity
Academy Awards® 2 March 2014	Best Picture	Film Award presented to Brad Pitt, Dede Gardner, Jeremy Kleiner, Steve McQueen and Anthony Katagas	12 Years a Slave
	Sound Editing	Glenn Freemantle	Gravity
	Sound Mixing	Christopher Benstead and Chris Munro (with Skip Lievsay and Niv Adiri)	Gravity
	Visual Effects	Tim Webber, Chris Lawrence and Neil Corbould (with David Shirk)	Gravity
	Music (Original Score)	Steven Price	Gravity
	Film Editing	Mark Sanger (with Alfonso Cuarón)	Gravity

Source: BFI

Note: No major awards were made to British talent or films at Berlin in 2013.

- For more on film distribution in 2013 see Chapter 9 (page 93)
- For more on film exhibition in 2013 see Chapter 10 (page 104)
- For more on film production in 2013 see Chapter 17 (page 178)

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 8

Theatrical release history and comparative performance of independent domestic UK films

A successful theatrical release is seen as key to a film's long-term prospects, and competition for the available cinema release slots is fierce. However, two thirds of independent domestic UK films which are not released theatrically do reach audiences by being shown at festivals or becoming available on other platforms.

FACTS IN FOCUS:

Just under half (48%) of independent domestic UK films with production budgets of £500,000 or more shot between 2003 and 2011 were released within two years of principal photography.

The percentage of independent domestic UK films achieving a theatrical release increased with the level of budget.

For independent domestic UK films with budgets of less than £5 million, the highest proportion of box office came from the UK and Republic of Ireland, but for films with budgets of £5 million or more less than a quarter came from the UK and Republic of Ireland.

Of the films which do not achieve a theatrical release, 67% get shown via another medium or become available on other platforms, with screenings at film festivals and releases on physical video being the most common.

8.1 Theatrical release of independent domestic UK films

This chapter looks at the theatrical release performance, in the UK and internationally, of independent domestic UK films, by budget band. Domestic UK films are features made by UK production companies that are produced wholly or partly in the UK. Creative input to domestic films is from the UK producers, but some of the films are made with financial backing from non-British companies. However, the description 'independent' means that no support is provided by the major US studios.

The reference period is the production years 2003 to 2011. (Production year is defined as the year in which principal photography begins.) We have restricted our analysis to these years because comprehensive production tracking data are available from 2003 onwards, and 2011 is the latest production year included as we base release rates on films which were released within two years of the start of principal photography. This will underestimate the final release rate, but provides a common measure for comparing films of different budget levels. (Looking just at independent domestic UK films produced up to 2009, 11% were released theatrically more than two years after the start of principal photography.)

Our data on box office and theatrical release details (opening date, distributor, gross, etc) are supplied by Rentrak, and so the definition of release also depends on having the release data from this company. Occasionally a film might be released for a short time in a small number of venues and is not tracked by Rentrak. Such a film would be included as not released in the release rate calculations, even if the limited release occurred within two years of principal photography.

It should be borne in mind that the number of effective theatrical release slots each year is tightly constrained, there being only 52 weekends per year. Films can also be released on DVD/Blu-ray, shown on television, or downloaded or streamed over different digital platforms.

The theatrical release territories included in the analysis of international release performance are: Argentina, Australia, Austria, Brazil, Chile, Colombia, France, Germany, Italy, Japan, South Korea, Mexico, the Netherlands, New Zealand, Portugal, Spain, the UK and Republic of Ireland (one territory), the USA and Canada (one territory) and Venezuela. These 19 territories are covered because they account for the majority (71% in 2013, according to IHS) of the global theatrical market, and because title-matched box office data for these territories are available.[1]

It is possible that the 'true' release rates could be higher than shown in the following Tables, as our release information covers only the territories listed above. However, while our estimates of the release rates based on the available data might be slightly lower than the true worldwide release rates, they should be sufficient for providing accurate comparisons of release rates by production budget.

8.2 Release rates of independent domestic UK films in the UK and Republic of Ireland

Of the 1,546 independent domestic UK films shot between 2003 and 2011, 388 (25%) were released theatrically in the UK and Republic of Ireland within two years of principal photography (Table 8.1). Looking just at films with budgets of £500,000 or more, the release rate was 48%. Release rates increased with budget, with over 80% of films made for more than £10 million achieving a UK theatrical release within two years of principal photography (10 releases from 12 productions).

[1] For Colombia and Venezuela box office data are available only from early 2007, so it is possible that some of the earlier films were released in these territories but were missed from the present study. The earliest box office data for Portugal, the Netherlands and Japan are for August 2006, September 2004 and January 2004 respectively, so it is also possible that some of the films produced before these dates are incorrectly recorded as not having been released in these territories. For the other 14 territories the box office data are available from before 2003.

Table 8.1 Release rates of independent domestic UK films in the UK and Republic of Ireland, by budget, production years 2003-2011

Budget band (£ million)	Number of films produced	Number released within two years of principal photography	% released	Median budget of released films (£ million)
<0.5	973	113	11.6	0.2
0.5 – 2	348	132	37.9	1.0
2 – 5	157	93	59.2	2.7
5 – 10	56	40	71.4	6.5
10+	12	10	83.3	12.0
Total	**1,546**	**388**	**25.1**	**1.1**

Source: Rentrak, BFI

Notes:
Release rates subject to two-year release limit (see section 8.1).
A film is considered to be released theatrically if it was recorded as such by Rentrak.

8.3 Box office performance of independent domestic UK films released in the UK and Republic of Ireland

Table 8.2 shows the median and mean UK box office takings for independent domestic UK films by budget. (Because there were just 40 and 10 releases in the £5-£10 million and £10+ million budget bands, these two bands have been combined in the box office analysis.) The table shows that both the median and mean box office values increase with budget, with a median box office of more than £1 million (and a mean of nearly £4 million) for films with budgets of more than £5 million.

Table 8.2 Box office performance of independent domestic UK films released in the UK and Republic of Ireland by budget, production years 2003-2011

Budget band (£ million)	Number of films released	Median box office (£ 000)	Mean box office (£ 000)
<0.5	113	5	33
0.5 – 2	132	30	216
2 – 5	93	270	1,510
5+	50	1,178	3,777
Total	**388**	**53**	**932**

Source: Rentrak, BFI

Notes:
Figures shown are of independent domestic UK films released in the UK and Republic of Ireland within two years of principal photography (see section 8.1).
Box office figures valid to February 2014.
The median (the value at which equal numbers of films have higher and lower box office values) is a better representation of the 'middle' of the distribution of box office revenues than the mean which tends to have an upward skew due to a small number of high grossing films. Means are also shown in the table for reference.

8.4 International release rates of independent domestic UK films

Table 8.3 shows that 27% of all independent domestic UK films shot between 2003 and 2011 were released theatrically in one or more of the 19 territories covered in this analysis within two years of the start of principal photography. The release rate increases by budget level, with more than 90% of productions with budgets of £10 million or more achieving an international release within two years of principal photography (11 international releases from 12 productions).

Table 8.3 International release rates of independent domestic UK films by budget, production years 2003-2011

Budget band (£ million)	Number of films produced	Number released within two years of principal photography	% released	Median budget of released films (£ million)
<0.5	973	122	12.5	0.2
0.5 – 2	348	142	40.8	1.0
2 – 5	157	104	66.2	2.7
5 – 10	56	43	76.8	6.5
10+	12	11	91.7	12.3
Total	**1,546**	**422**	**27.3**	**1.1**

Source: Rentrak, BFI

Notes:
Release rates are calculated two years after principal photography (see section 8.1).
A film is 'internationally released' if it was recorded as such in any one of the 19 Rentrak territories monitored (see section 8.1 for the list).

8.5 Box office performance of independent domestic UK films released internationally

The international box office performance (from 19 territories) by budget showed similar patterns to the UK box office (Table 8.4). The median and mean box office increased with budget, with a median box office of over $5 million for films with budgets of over £5 million. Some independent domestic UK films of recent years, such as *The King's Speech, Slumdog Millionaire* and *The Woman in Black*, have been very successful internationally; the mean international box office takings for films with budgets of over £5 million is more than $43 million.

Table 8.4 Box office (US$) for independent domestic UK films released in at least one of 19 territories by budget, production years 2003-2011

Budget band (£ million)	Number of films released	Median box office (US$ 000)	Mean box office (US$ 000)
<0.5	122	12	91
0.5 – 2	142	120	733
2 – 5	104	917	4,072
5+	54	5,322	43,151
Total	**422**	**150**	**4,299**

Source: Rentrak, BFI

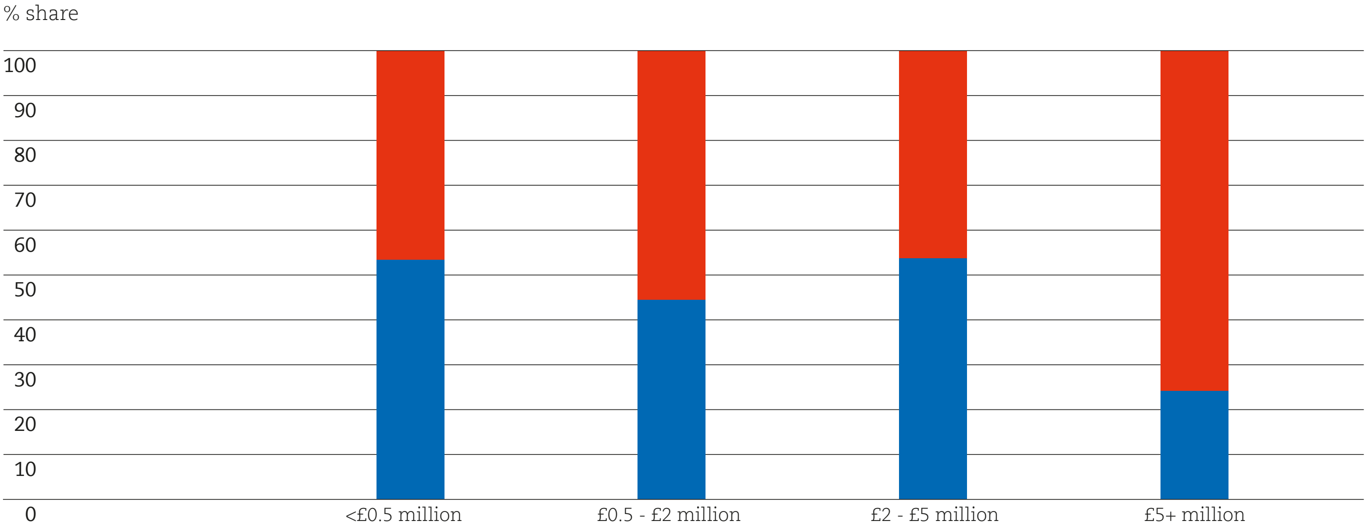
Notes:
Figures shown are for independent domestic UK films released in at least one of 19 Rentrak territories within two years of principal photography (see section 8.1).
Box office figures valid to February 2014.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

8.6 Local and overseas share of box office of independent domestic UK films

Figure 8.1 shows the share of box office takings in the UK and Republic of Ireland and overseas for independent domestic UK films by budget. For films with budgets up to £5 million, box office takings from the UK and Republic of Ireland and from overseas were approximately equal, but for films with budgets of £5 million or more, over 70% of the total 19 territory international box office came from overseas territories.

Figure 8.1 Local and overseas share of independent domestic UK film box office by budget, production years 2003-2011



	<£0.5 million	£0.5 - £2 million	£2 - £5 million	£5+ million
UK and Republic of Ireland	53.4	44.4	53.7	24.2
Overseas	46.6	55.6	46.3	75.8

Source: Rentrak, BFI

Notes:
Release rates subject to limit of two years from principal photography (see section 8.1).
Box office figures valid to February 2014.

Table 8.5 shows the relative importance of geographically grouped international territories for independent domestic UK films. Overall, just under one third (32%) of the 19 territory international box office came from the UK and Republic of Ireland, with the next most important territories being the USA and Canada (28% of total international box office) and other EU countries (22%). Australia and New Zealand account for around 9% of the total box office, and only a small percentage of the box office is generated in Japan and South Korea or Central and South America (4% for each group).

Table 8.5 Share of 19 territory international box office of independent domestic UK films by grouped territories, production years 2003-2011

Territories	Share of international box office (%)
UK and Republic of Ireland	32
USA and Canada	28
Austria, France, Germany, Italy, the Netherlands, Portugal, Spain	22
Australia, New Zealand	9
Japan, South Korea	4
Argentina, Brazil, Chile, Colombia, Mexico, Venezuela	4
Total of Rentrak multi-territory box office	**100**

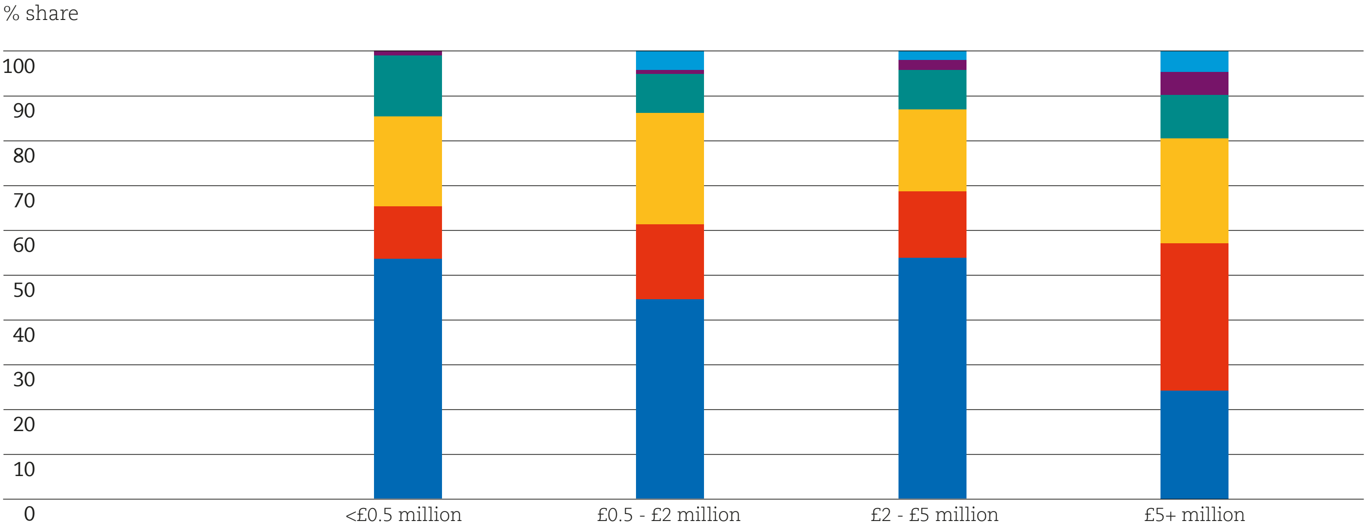
Source: Rentrak, BFI

Notes:
Release rates subject to two-year release limit (see section 8.1).
Box office figures valid to February 2014.
Percentages may not sum to 100 due to rounding.

A further breakdown of the international box office shares, by geographically grouped territory and budget, is shown in Figure 8.2.

For the three lowest budget bands the pattern of box office share are very similar, with the UK and Republic of Ireland having the highest share followed by the other EU countries. The pattern was different however, for the films in the highest budget band. The territory with the highest box office share (33%) was USA and Canada followed by the UK and Republic of Ireland and other EU countries. The share for the UK and Republic or Ireland (24.2) was only slightly higher than that for the other EU countries (23.5).

Figure 8.2 Share of 19 territory international box office of independent domestic UK films by grouped territories and budget, production years 2003-2011



	<£0.5 million	£0.5 - £2 million	£2 - £5 million	£5+ million
UK and Republic of Ireland	53.4	44.4	53.7	24.2
USA and Canada	11.7	16.8	14.8	32.9
Other EU	20.1	24.8	18.4	23.5
Australia/New Zealand	13.5	8.7	8.8	9.7
Japan/South Korea	–	1.0	2.2	5.1
Central and South America	1.2	4.3	2.1	4.6

Source: Rentrak, BFI

See notes to Table 8.5.

8.7 Profitability

It is difficult to measure the overall profitability of UK films. However, a proxy measure such as the ratio of international box office to budget can be a useful indicator. Previous RSU analysis suggested that if a low to medium budget British film generates worldwide box office revenues greater than twice its budget, it is likely to be in profit by the time returns from ancillary revenues (physical video, digital downloads, television, etc) are added to its income stream and all costs deducted (VAT, exhibition, distribution and retail margins, prints and advertising, etc). Below that level it is likely to have made a loss.

The box office to budget ratio of 2 is used here for films of all budgets even though it has not been tested on very low budget films (under £500,000). It is possible that a different proxy measure of profitability is more appropriate for these films (a higher percentage of total revenue might come from video and digital sales than from box office, for example).

In the present study, the international box office from the 19 Rentrak territories is used as a proxy measure for 'worldwide' box office.

Table 8.6 shows the numbers of films which had gained a theatrical release within two years of principal photography and the number and percentage of these releases which achieved an international box office to budget ratio of 2 or more.

Overall, just under 7% of released films achieved the international box office to budget ratio of 2 (8% for films with budgets of £500,000 or more). The percentage of films achieving this ratio increased with budget, with only 3% of films with budgets of less than £500,000, but nearly 15% of films made for £5 million or more, achieving the ratio.

Table 8.6 Percentage of independent domestic UK films achieving multi-territory box office to budget ratio of 2 or above by budget, production years 2003-2011

Budget band (£ million)	Number of films released within two years of principal photography	Number of films achieving a ratio of 2 or above	% of films achieving a ratio of 2 or above
<0.5	122	4	3.3
0.5 – 2	142	7	4.9
2 – 5	104	9	8.7
5+	54	8	14.8
Total	**422**	**28**	**6.6**

Source: Rentrak, BFI

Notes:
Release rates subject to two-year release limit (see section 8.1).
Box office figures valid to February 2014.

8.8 Films which were not released theatrically

In this section we look at what has happened to films for which we have information on production, but not on theatrical release at any time (we do not use the release within two years of principal photography criterion in this section). Our data on box office and theatrical release details are supplied by Rentrak, and so the definition of release also depends on having the release data from this company. Occasionally a film might be released for a short time in a small number of venues but is not tracked by Rentrak. Such a film would be included as not released in the release rate calculations (even if the limited release occurred within two years of principal photography). Even where a film is not shown in a cinema (whether tracked or not), there are many other ways for it to be seen by an audience, and so it is of interest to know what happens to films which do not achieve a theatrical release.

We have looked at 620 independent domestic UK films, produced between 2003 and 2011, for which we had information on production but no data on theatrical release from Rentrak. Using other sources of information (IMDb, film festival websites, films' own websites, etc) the outcome of these film projects (whether they have been shown at any venue or festival or whether they were made available on any medium) was investigated. There are many possibilities for the outcome of a film project and Table 8.7 shows the number of films, by budget, which fall into three broad outcome categories:

- The film has been completed and shown or is available;
- The film is still in production or post-production; and
- No information found.

The last category includes all films for which no information was available from the sources investigated; it does not indicate a definite outcome. For example, any film for which production has been abandoned would fall into the last category, but not all films in this category would have been abandoned. Table 8.7 shows that, overall, at least 414 (67%) of the 620 films which did not achieve a theatrical release were shown on another medium or are available on some other platform.

Table 8.7 Outcome of projects by budget for independent domestic UK films which have not been released theatrically, production years 2003-2011

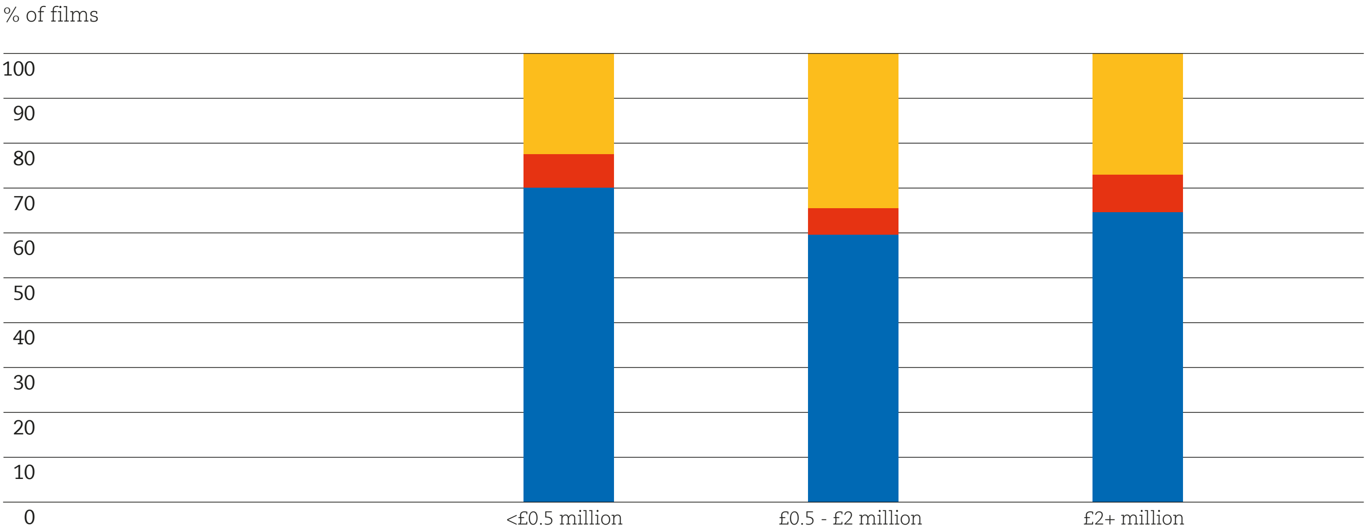
	Budget			
Outcome	<£0.5 million	£0.5 - £2 million	£2+ million	Total
Shown/available	284	99	31	414
In production/post-production	30	10	4	44
No information	92	57	13	162
Total	**406**	**166**	**48**	**620**

Source BFI RSU

Note: Films which had limited releases that were not tracked by Rentrak are considered to be not released.

For non-released films, the percentage of films which have been shown at a small venue or festival or are available to audiences on one or more release platforms is in the range 60%-70% for all budget bands (Figure 8.3). Overall, two thirds (67%) of films have been shown or are available, and a further 7% of films are still in production/post-production.

Figure 8.3 Percentages of 'non-released' independent domestic UK films falling into each of three basic outcome categories by budget, production years 2003-2011



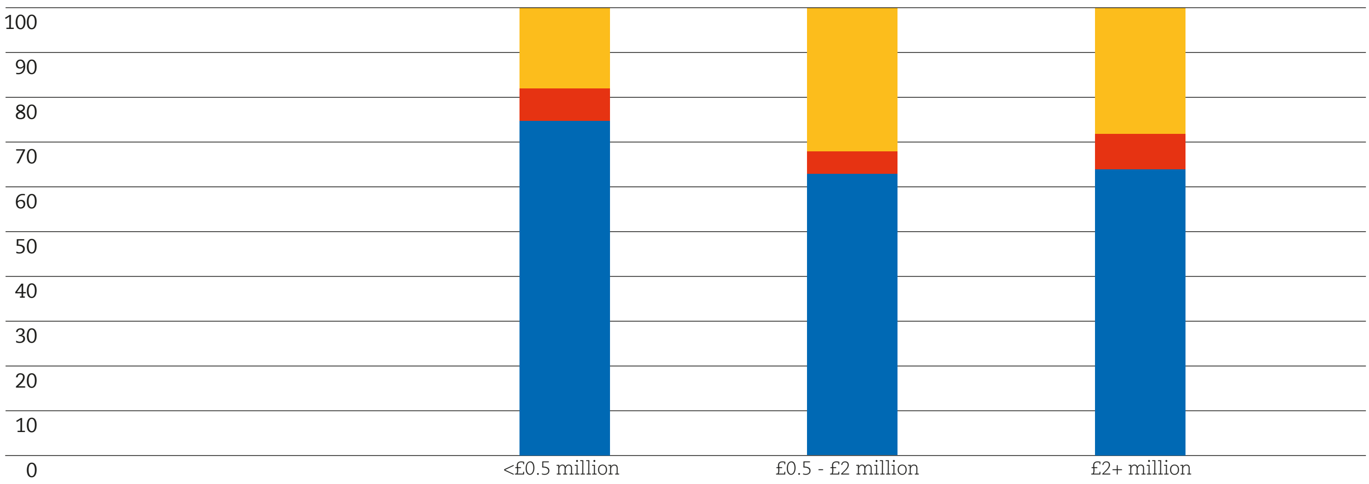
	<£0.5 million	£0.5 - £2 million	£2+ million
Shown / available	70.0	59.6	64.6
In production / post-production	7.4	6.0	8.3
No information	22.7	34.3	27.1

Source: BFI RSU

Notes:
Films which had limited releases that were not tracked by Rentrak are considered to be not released.
Percentages may not sum to 100 due to rounding.

The amount of total budget by outcome for the non-released films shows a similar pattern to the numbers of films by outcome (Figure 8.4). Overall, the films which have been shown or are available or are still in production/post-production account for just over 70% of the total budget for all films.

Figure 8.4 Percentages of total budget for 'non-released' independent domestic UK films falling into each of three basic outcome categories by budget, production years 2003-2011



	<£0.5 million	£0.5 - £2 million	£2+ million
Shown / available	74.7	62.7	63.9
In production / post-production	7.3	5.1	7.9
No information	18.0	32.3	28.2

Source: BFI RSU

Notes:
Films which had limited releases that were not tracked by Rentrak are considered to be not released.
Percentages may not sum to 100 due to rounding.

For films that have been identified as having been shown at some venue or are available on some platform, Table 8.8 shows, by production period and budget, where they have been shown or are available. Some films are available on more than one platform or have been shown or broadcast and are also available on video or online, and so the sums over the categories in this Table are greater than the Table totals.

Table 8.8 Numbers of 'non-released' independent domestic UK films shown or available by budget, production years 2003-2011

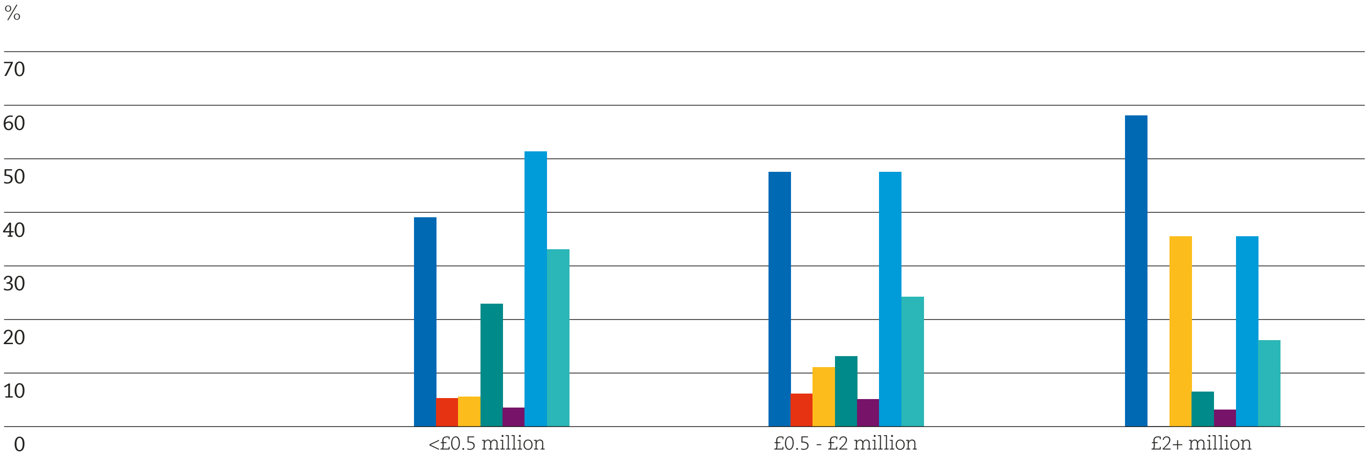
Outcome	<£0.5 million	£0.5 - £2 million	£2+ million
Available on physical video	111	47	18
Available online	15	6	–
Shown on television	16	11	11
Limited UK theatrical release	65	13	2
International release	10	5	1
Shown at film festival and other	146	47	11
Shown at film festival only	94	24	5
Total	**284**	**99**	**31**

Source: BFI RSU

Notes:
Categories may sum to more than the totals as some films are included in more than one category.
Films which had limited releases that were not tracked by Rentrak are considered to be not released.

For films made with budgets of £2 million or more, which were not released theatrically but have been shown or are available, the most common platform on which they are available is physical video. For films in the other two budget bands, screenings at film festivals represent the most common platform for reaching audiences. The films shown at festivals have been divided into films screened at festivals and also available elsewhere and films screened at festivals only. A film festival provides in effect a one-off opportunity for a film to be viewed so a film shown just at a festival has less opportunity to reach an audience than one shown at a festival and also available on other platforms.

Figure 8.5 Percentages of 'non-released' independent domestic UK films in each shown or availability category by budget, production years 2003-2011



	<£0.5 million	£0.5 - £2 million	£2+ million
Available on physical video	39.1	47.5	58.1
Available online	5.3	6.1	–
Shown on television	5.6	11.1	35.5
Limited UK theatrical release	22.9	13.1	6.5
International release	3.5	5.1	3.2
Shown at film festival and other	51.4	47.5	35.5
Shown at film festival only	33.1	24.2	16.1

Source: BFI RSU

Notes:
Percentages over categories add to more than 100 as some films are included in more than one category.
Films which had limited releases that were not tracked by Rentrak are considered to be not released.

- For cinema admissions and box office in 2013 see Chapter 1 (page 10)
- For more on UK films on video see Chapter 11 (page 121)
- For more on UK films on television see Chapter 13 (page 138)
- For more on UK films internationally see Chapter 6 (page 60)
- For more on the UK film economy see Chapter 21 (page 220)

Chapter 9

Distribution

The theatrical marketplace is dominated by a few very large companies. In 2013, the top 10 distributors generated £1.14 billion in theatrical revenues, while the remainder made less than £42 million.

FACTS IN FOCUS:

The top 10 distributors had a 96% share of the market in 2013, slightly higher than in 2012.

The market share for distributors outside the top 10, at 4%, was the lowest since 2005

Weekdays (Monday to Thursday) accounted for 41% of the box office in 2013, slightly less than in 2012.

Opening weekends represented 28% of the total box office.

The estimated total amount spent by distributors on advertising films released theatrically was just over £189 million.

The average advertising spend for studio-backed UK films was £1.4 million, compared with £1.7 million in 2012.

9.1 Distributors

Table 9.1 shows that the top 10 distributors had a 96% share of the market in 2013 from the release of 310 titles (38% of all releases). The market share is similar to 2012 when the top 10 distributors had 95% of the total box office from 250 releases (33% of all releases). The remaining 117 distributors handled a total of 511 titles (62% of all releases) but gained only a 4% share of the box office.

The leading distributor was Warner Bros, which released the second highest earning film of 2013, *The Hobbit: The Desolation of Smaug*, as well as *Gravity* and *Man of Steel*. Table 9.1 shows box office takings by distributor for all films on release during 2013, and hence includes the box office takings of films which were released in 2012 but remained on release into 2013. In second place in the list of top 10 distributors is Walt Disney whose highest earning films of the year were *Frozen*, *Iron Man 3* and *Monsters University*. All of these films are in the list of the top 20 films of the year.

Table 9.1 Distributor share of box office, UK and Republic of Ireland, 2013

Distributor	Market share (%)	Films on release in 2013	Box office gross (£ million)
Warner Bros	17.2	24	204.1
Walt Disney	15.2	30	180.4
Universal	15.1	31	178.7
20th Century Fox	13.1	35	155.4
eOne Films	9.0	50	106.8
Sony Pictures	8.7	27	103.3
Paramount	7.8	16	92.2
Lionsgate	4.7	32	55.3
StudioCanal	2.8	48	33.2
Entertainment	1.9	17	23.1
Sub total	95.5	310	1,132.5
Others (117 distributors)	4.5	511	53.2
Total	**100.0**	**821**	**1,185.7**

Source: Rentrak

Notes:
The total number of films on release differs from Table 9.6 as it includes all films on release in 2013, including titles first released in 2012.
Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2013 to 31 December 2013.

The distributors' market shares fluctuate from year to year (Table 9.2). Warner Bros was the leading distributor of 2013 (as well as in 2010 and 2011) but Sony Pictures, the leading distributor of 2012 dropped to sixth place. The top independent distributor in the list was eOne Films whose titles included *The Impossible* and *Now You See Me*, as well as independent UK films *Quartet*, *Red 2* and *Song for Marion*.

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, and only six different independent distributors appear in the top 10 over the decade included in the table. In 2013, however, following eOne Films' takeover of Momentum, eOne Films moved to fifth place in the list, overtaking both Sony Pictures and Paramount. In the last few years, the share of box office generated by distributors outside the top 10 has ranged from under 3% in 2005 to just below 8% in 2009. The share in 2013, at 4.5%, was the lowest since 2005.

Table 9.2 Distributor market share as percentage of box office gross, 2004-2013

Distributor	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Warner Bros	14.7	18.2	8.2	15.6	11.0	11.2	18.3	18.2	12.9	17.2
Walt Disney	14.5	13.1	15.7	10.7	9.9	12.4	14.0	8.7	10.2	15.2
Universal	–	–	–	13.9	18.5	10.5	10.2	11.8	10.7	15.1
20th Century Fox	10.7	14.3	20.9	13.9	9.4	16.6	15.9	12.1	16.1	13.1
eOne Films	–	–	–	–	–	4.9	5.5	5.1	6.7	9.0
Sony Pictures	10.0	6.8	16.1	8.2	12.5	11.3	6.9	7.2	18.0	8.7
Paramount	–	–	–	14.7	16.9	10.8	14.8	16.3	7.7	7.8
Lionsgate	1.0	0.3	2.4	2.3	2.5	2.9	3.5	–	5.7	4.7
Optimum/StudioCanal*	–	–	–	–	–	–	2.2	3.8	–	2.8
Entertainment	7.9	9.4	7.9	9.5	8.0	8.6	2.5	6.7	3.1	1.9
Momentum**	2.2	1.9	2.3	3.4	3.5	–	–	4.6	4.3	–
Pathé	2.8	3.4	3.2	1.3	2.1	2.9	–	–	–	–
UIP***	29.8	29.1	18.9	–	–	–	–	–	–	–
Top 10 total****	96.1	97.3	96.4	94.5	94.5	92.2	93.7	94.4	95.4	96.5
Others	3.9	2.7	3.6	5.5	5.5	7.8	6.3	5.6	4.6	4.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Rentrak

Notes:
Percentages may not add to sub-totals due to rounding.
* Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.
** Momentum was taken over by eOne Films in January 2013.
*** Until 2006 Paramount and Universal distributed jointly as UIP.
**** Top 10 total refers to the top 10 distributors of that particular year. The table is ranked by top 10 distributors in 2013.

Tables 9.3 to 9.5 show the top 10 distributors of specialised films, foreign language films, and UK independent films in 2013.

The BFI considers films that do not sit easily within a mainstream commercial genre to be ‘specialised’ (see Chapter 5 for more information).

A total of 446 specialised films were released in the UK in 2013 (just under two thirds of all releases), grossing £110 million (10% of the total box office). The top 10 distributors of these films released 121 specialised titles, which took £76 million at the box office (Table 9.3). The distributor with the highest box office share for specialised films was eOne Films with a total gross of £16 million. It released nine films in this category in 2013 including the third highest grossing specialised title, *Quartet*. Second in the list is 20th Century Fox, which released eight specialised titles including the second highest grossing specialised film, *Lincoln*. Pathé is third in the list with four releases including the top earning specialised film of the year, *Philomena*. StudioCanal and Curzon Film World released the highest number of specialised films in 2013, with 33 and 24 releases respectively.

Table 9.3 Top 10 distributors of specialised films in the UK and Republic of Ireland, 2013 (ranked by box office gross)

Distributor	Number of films released in 2013	Average widest point of release	Box office gross (£ million)
eOne Films	9	197	16.0
20th Century Fox	8	193	12.5
Pathé	4	168	12.0
Lionsgate	11	116	6.6
StudioCanal	33	26	5.6
Curzon Film World*	24	26	5.4
Warner Bros	2	155	5.2
Universal	4	193	4.5
Eros International	19	39	4.2
UTV Motion Pictures	7	66	3.9

Source: Rentrak, BFI RSU analysis

Notes:
The list includes distributors releasing two or more specialised films in 2013.
*Artificial Eye Film Releasing was rebranded as Curzon Film World in April 2013.

Foreign language films accounted for two fifths of releases at the UK box office in 2013. The top 10 distributors of foreign language films released 92 of the total 279 titles (Table 9.4). Hindi and Tamil were the two most popular non-English languages for films released in the year, while French was third. In fourth place was Punjabi, so companies releasing films from the South Asian subcontinent – such as Eros International, UTV Motion Pictures and Yash Raj Films – feature highly in the list.

The distributor of the highest grossing foreign language film of the year, Hindi film *Dhoom: 3*, was Yash Raj Films, which is third in the list of top foreign language distributors. Ayngaran and StudioCanal released the most foreign language titles (22) in 2013. However, most of StudioCanal's films had limited releases and so it does not appear in the list of top 10 foreign language film distributors. Eros International's 19 releases had the biggest share of the box office overall (£4.2 million), while Curzon Film World had the largest share (£2.4 million) among distributors of non-Indian foreign language films. Curzon Film World titles included *The Great Beauty* (in Italian), *Blue Is the Warmest Colour* (in French), and *Lore* (in German).

Table 9.4 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2013 (ranked by box office gross)

Distributor	Number of films released in 2013	Average widest point of release	Box office gross (£ million)
Eros International	19	39	4.2
UTV Motion Pictures	7	66	3.9
Yash Raj Films	4	49	2.9
Curzon Film World*	12	20	2.4
Ayngaran	22	13	1.3
eOne Films	2	79	1.2
Tip Top Entertainment	7	27	1.0
Pathé	3	36	0.9
Soda Pictures	12	15	0.8
Reliance Entertainment	4	50	0.7

Source: Rentrak, BFI RSU analysis

Notes:
The list includes distributors releasing two or more foreign language titles in 2013.
* See note to Table 9.3.

The combined box office gross for all independent UK films released in 2013 was £77 million (7% of the total box office) from 123 releases. The 49 films released by the top 10 distributors of independent UK titles accounted for £63 million, which equates to 83% of the total box office generated by this category (Table 9.5). The distributor with the largest share was StudioCanal which handled three of the year's top 10 earning UK independent films, *Rush*, *I Give It a Year* and *Alan Partridge: Alpha Papa*. Second in the list is eOne Films which had two top 10 films, *Quartet* and *Red 2*. Both StudioCanal and eOne Films released nine UK independent films, the highest number of any distributors in 2013. However, this number of UK independent releases was also achieved by Kaleidoscope, which does not appear in the list of top 10 distributors. (Kaleidoscope's highest grossing films were *A Belfast Story* and *Saving Santa*.)

Table 9.5 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2013 (ranked by box office gross)

Distributor	Number of films released in 2013	Average widest point of release	Box office gross (£ million)
StudioCanal	9	200	23.5
eOne Films	9	272	17.2
Entertainment	3	388	9.6
Lionsgate	4	202	4.6
Vertigo Films	6	97	2.7
Universal	2	286	2.2
Curzon Film World*	4	54	1.9
Metrodome	6	20	0.7
Picturehouse	3	47	0.6
Dogwoof	3	34	0.3

Source: Rentrak, BFI RSU analysis

Notes:
The list includes distributors releasing two or more UK independent films in 2013.
* See note to Table 9.3.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

9.2 Width of release

Table 9.6 shows the numbers and percentages of releases by widest point of release from 2007 to 2013. While the total number of films released has increased each year since 2007 (with the exception of 2009), the majority of the increase is accounted for by films shown at fewer than 50 sites. Consistently from 2007 to 2013 around 60% of releases have been shown at fewer than 50 sites, with more than one third of releases each year being shown at fewer than 10 sites.

Table 9.6 Numbers and percentages of releases by widest point of release, 2007-2013

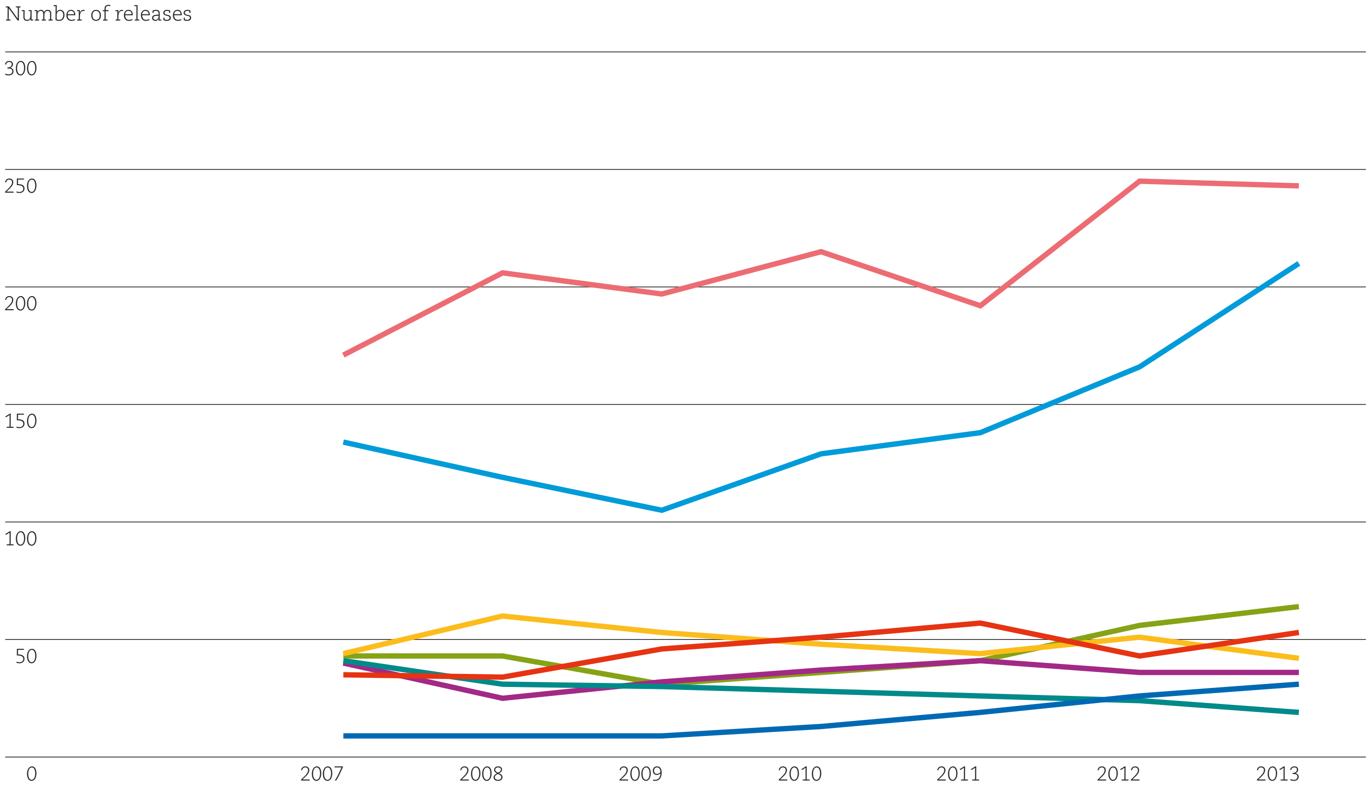
	2007		2008		2009		2010		2011		2012		2013	
Sites at widest point of release	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases
>=500	9	1.7	9	1.7	9	1.8	13	2.3	19	3.4	26	4.0	31	4.4
400 – 499	35	6.8	34	6.5	46	9.1	51	9.2	57	10.2	43	6.6	53	7.6
300 – 399	44	8.5	60	11.4	53	10.5	48	8.6	44	7.9	51	7.9	42	6.0
200 – 299	41	7.9	31	5.9	30	6.0	28	5.0	26	4.7	24	3.7	19	2.7
100 – 199	40	7.7	25	4.7	32	6.4	37	6.6	41	7.3	36	5.6	36	5.2
50 – 99	43	8.3	43	8.2	31	6.2	36	6.5	41	7.3	56	8.7	64	9.2
10 – 49	134	25.9	119	22.6	105	20.9	129	23.2	138	24.7	166	25.7	210	30.1
<10	171	33.1	206	39.1	197	39.2	215	38.6	192	34.4	245	37.9	243	34.8
Total	**517**	**100.0**	**527**	**100.0**	**503**	**100.0**	**557**	**100.0**	**558**	**100.0**	**647**	**100.0**	**698**	**100.0**

Source: Rentrak, BFI RSU analysis

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

As mentioned above, from 2007 to 2013 more films were shown at fewer than 50 sites at their widest point of release than in any other category. To 2011 films released at the greatest number of sites (500+) represented the category with the lowest number of releases, but the pattern has changed in the last two years. In 2012 there were two fewer films released at 200-299 sites than films released at 500 or more sites, and in 2013 there were 31 films released at more than 500 sites compared with just 19 released at 200-299 sites. As Figure 9.1 shows, from 2007 to 2012 the trend in the number of films released at 200-299 sites has shown a gradual decrease, but in the other widest point of release bands (50-99, 100-199, 300-399 and 400-499 sites) the numbers of releases vary and no consistent patterns are evident. (For information on box office by widest point of release see Chapter 1.)

Figure 9.1 Numbers of releases by widest point of release, 2007-2013



	2007	2008	2009	2010	2011	2012	2013
>=500	9	9	9	13	19	26	31
400 – 499	35	34	46	51	57	43	53
300 – 399	44	60	53	48	44	51	42
200 – 299	41	31	30	28	26	24	19
100 – 199	40	25	32	37	41	36	36
50 – 99	43	43	31	36	41	56	64
10 – 49	134	119	105	129	138	166	210
<10	171	206	197	215	192	245	243

Source: Rentrak, BFI RSU analysis

9.3 Weekend box office

In 2013, 59% of box office revenue was taken at weekends (Friday to Sunday), a similar proportion to the 58% seen in 2012 (Table 9.7). The pattern of box office takings by day has remained consistent for the last six years. The 'Orange/EE Wednesdays' promotion continued to have an impact in 2013 with just less than 13% of the box office being taken on Wednesdays (slightly lower than the previous four years but higher than any other weekday).

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 9.7 Box office percentage share by weekday/weekend, 2004-2013

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Friday	15.3	18.0	16.5	16.4	16.7	16.4	16.0	16.6	16.4	15.8
Saturday	24.5	27.0	25.1	27.8	24.4	24.0	24.1	23.8	24.1	24.9
Sunday	19.9	19.0	18.7	19.3	18.3	17.8	18.5	17.6	17.6	18.2
Weekend	**59.7**	**64.0**	**60.3**	**63.5**	**59.4**	**58.2**	**58.6**	**57.9**	**58.1**	**58.9**
Monday	9.7	8.0	9.5	7.2	9.4	9.2	9.5	9.2	9.3	8.9
Tuesday	10.1	8.0	9.5	9.0	9.5	9.5	9.3	9.1	9.3	9.4
Wednesday	10.7	10.0	10.9	11.6	11.9	13.7	13.2	13.9	13.4	12.6
Thursday	9.8	10.0	9.7	8.7	9.9	9.5	9.3	9.8	9.8	10.2
Weekday	**40.3**	**36.0**	**39.7**	**36.5**	**40.7**	**41.8**	**41.4**	**42.1**	**41.9**	**41.1**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Rentrak

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

For many films the opening weekend box office represents a significant proportion of their total theatrical gross. Overall, the opening weekend box office as a share of total theatrical revenue was 28% in 2013 as shown in Table 9.8. The year's top film, *Despicable Me 2*, took £15 million on its opening weekend, which represented just over 30% of its total gross (to 23 February 2014). Of the top 10 films, those with the highest percentage of total box office taken on the opening weekend were *Iron Man 3* and *Man of Steel*, both with 37%. Only three of the top 10 films took less than 20% of their total box office grosses on their opening weekends. These were *Les Misérables* (whose opening weekend take was just under 20% of its final gross), *Frozen* (12% of its gross to 23 February 2014) and *Monsters University* (11% of its gross to 23 February 2014). *Monsters University* had the second lowest opening gross of the year's top 20 films. However, it had been on release for 32 weeks to 23 February 2014, so it is not surprising that its opening weekend's takings were a small percentage of its total gross. In contrast, *Frozen* had been on release for just 12 weeks to 23 February 2014. The theatrical runs for *Iron Man 3* and *Man of Steel* lasted for 17 and 19 weeks respectively. (For information on box office by length of release see Chapter 1.)

Table 9.8 Opening weekend as percentage of total box office, 2007-2013

							% of total in opening weekend
Range of box office (£ million)	2007	2008	2009	2010	2011	2012	2013
>30	35.8	21.7	18.8	27.4	29.4	27.0	24.0
20 – 30	30.2	31.0	23.0	35.8	22.6	22.4	30.9
10 – 19.9	20.0	29.2	32.2	26.1	27.6	24.6	27.6
5 – 9.9	25.4	27.6	26.1	26.7	26.2	26.1	28.4
1 – 4.9	28.1	27.4	30.3	30.4	32.2	31.8	32.1
0.2 – 0.9	31.9	34.1	35.5	31.9	35.5	37.7	37.0
<0.2	34.1	34.8	36.5	34.8	38.5	37.8	38.3
All films	**28.5**	**27.3**	**26.1**	**28.6**	**28.1**	**26.8**	**28.4**

Source: Rentrak, 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.

9.4 Release costs

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, will encourage exhibitors to continue to screen a film which is particularly important for independent films which do not have the backing of the major studios.

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. The estimated total advertising spend by distributors in 2013 was just over £189 million, slightly higher than in 2012 (Table 9.9). However, there were 698 films released in 2013 compared with 647 in 2012, so the average advertising spend per film decreased by 7% (from £0.29 million per film in 2012 to £0.27 million per film in 2013). Press spend has fallen by around a third and radio spend has fallen by 40% since 2003, while spend on TV and outdoor advertising have increased by 46% and 53% respectively over the same period.

Table 9.9 Estimated advertising spend, 2003 and 2007-2013

(£ million)

Medium	2003	2007	2008	2009	2010	2011	2012	2013
TV	61.2	74.1	79.3	74.3	76.0	90.8	89.1	89.2
Outdoor	46.6	65.3	56.2	57.0	61.0	69.1	67.2	71.2
Press	30.1	27.0	22.6	19.9	19.9	22.0	21.5	20.7
Radio	9.7	8.4	9.4	10.7	7.6	6.8	6.8	5.9
Internet	–	4.7	4.5	6.4	6.1	8.5	4.0	2.5
Total	**147.6**	**179.5**	**172.0**	**168.3**	**170.6**	**197.2**	**188.6**	**189.4**

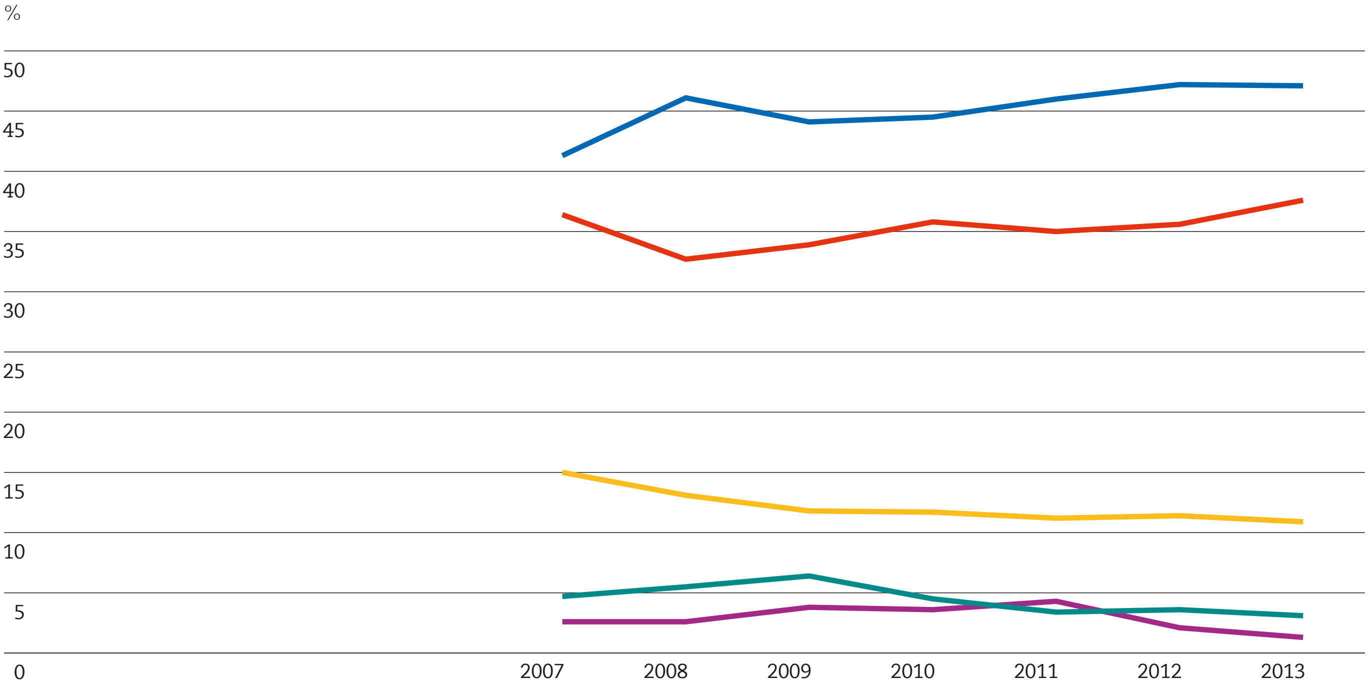
Source: Nielsen Media Research

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

Figure 9.2 shows the percentage share of advertising spend by medium since 2007. Over the period the highest proportion of advertising spend has been allocated to TV and outdoor advertisements. As noted above, the spend on advertising in the press has been steadily decreasing, in part due to falling newspaper circulations. In 2013 press advertising represented 11% of the total spend, compared with 15% in 2007. In most years, advertising on the internet accounted for the lowest proportion of spend compared with other media, but it increased every year from 2007 to 2011, when it overtook the percentage spent on radio advertising. This proportion decreased in 2012 and again in 2013 when it was not only the medium with the lowest share of spend, but was also at its lowest level of all the years web-based advertising has been monitored.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 9.2 Percentage share of advertising spend by medium, 2007-2013



	2007	2008	2009	2010	2011	2012	2013
TV	41.3	46.1	44.1	44.5	46.0	47.2	47.1
Outdoor	36.4	32.7	33.9	35.8	35.0	35.6	37.6
Press	15.0	13.1	11.8	11.7	11.2	11.4	10.9
Radio	4.7	5.5	6.4	4.5	3.4	3.6	3.1
Internet	2.6	2.6	3.8	3.6	4.3	2.1	1.3

Source: Nielsen Media Research

Approximately £44 million was spent on advertising British films in 2013, down from £49 million in 2012. However, fewer UK films were released in 2013 than in 2012 (139 in 2013 and 162 in 2012). The advertising spend for studio-backed UK films was £22 million (£1.4 million per film on average, compared with £1.7 million in 2012). Our data on advertising spend for individual films show that the amount spent on advertising independent UK films was £22 million (an average of £0.2 million per film, the same as in 2012), 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 print costs, the total release costs for various release widths can be estimated. When all cinema screens used 35mm prints, we estimated print costs at £1,000 per print. However, at the end of 2013 nearly all cinema screens were equipped for digital projection. Working with both analogue and digital distribution, as well as striking and refurbishing 35mm prints, distributors incur digital mastering and duplication costs and in many instances now Virtual Print Fees. Although it is likely that producing a digital print is cheaper than producing a 35mm print, no in depth research has been carried out on the average cost for a combination of digital and 35mm prints, taking account of these extra costs. In the absence of any empirical data on the current average cost, we have continued to use the same estimate as when all prints were analogue.

So, keeping the estimate of a typical cost of £1,000 per print and adding 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 (Table 9.10). This shows that for films released across the widest number of cinemas (500+) in 2013, the average release cost was £3 million, slightly lower than in 2012. For films released at 200-399 sites release costs were lower in 2013 than in 2012, but release costs increased slightly for films released at 400-499 sites and 100-199 sites. For all other width of release categories the 2013 release costs were almost identical to those of 2012.

Table 9.10 Estimated release cost by width of release, 2008-2013

Number of sites at widest point of release	Average release costs 2008 (£ million)	Average release costs 2009 (£ million)	Average release costs 2010 (£ million)	Average release costs 2011 (£ million)	Average release costs 2012 (£ million)	Average release costs 2013 (£ million)
500+	3.95	3.40	2.65	3.14	3.13	3.04
400 – 499	2.21	2.05	2.09	2.17	1.99	2.04
300 – 399	1.39	1.32	1.24	1.38	1.28	1.15
200 – 299	0.90	0.84	0.77	0.82	0.83	0.76
100 – 199	0.43	0.51	0.33	0.31	0.36	0.30
50 – 99	0.18	0.21	0.20	0.16	0.12	0.13
10 – 49	0.08	0.06	0.04	0.05	0.04	0.03
<10	0.01	0.01	0.01	0.01	0.01	0.01

Source: Nielsen Media Research, Rentrak, BFI RSU analysis

Note: The print costs calculations assume print costs for a combination of digital and analogue distribution are the same as for analogue distribution.

Table 9.11 shows the average release cost by production budget for 124 of the 139 UK films released in 2013. (These are the films 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 million to £9.9 million budget range and those made for £10 million or more. However, the highest budget films are most likely to have the highest promotional spend, in particular the high budget inward investment films backed by the major US studios which have large promotional budgets. The average release cost for the studio-backed films in this budget band was £2.3 million and the average release cost for independent films was £2 million.

Table 9.11 Estimated release cost by budget for UK films, 2013

Budget (£ million)	Number of films	Average release cost (£ million)
£10+	20	2.23
£5 – £9.9	9	0.85
£2 – £4.9	21	0.67
£0.5 – £1.9	33	0.07
<£0.5	41	0.03
All films	**124**	**0.56**

Source: Nielsen Media Research, BFI RSU analysis

Note: The print costs calculations assume print costs for a combination of digital and analogue distribution are the same as for analogue distribution.

- For more on the UK box office in 2013 see Chapter 1 (page 10)
- For more on the top films at the UK box office in 2013 see Chapter 2 (page 21)
- For more on specialised film releases at the UK box office see Chapter 5 (page 49)
- For an overview of employment in film distribution see Chapter 22 (page 232)

Chapter 10

Exhibition

The overall number of screens in the UK continues to rise, although the number of screens per person and admissions per person vary considerably across the country. Augmenting commercial cinema is a thriving voluntary sector in film exhibition; film society admissions are highest in areas less well served by commercial cinemas.

FACTS IN FOCUS:

At the end of 2013, the UK had 3,867 screens, 50 more than 2012, in 756 cinemas.

There were six screens for every 100,000 people, the same as in 2012, but lower than countries such as the USA (12.4), France (9.1), Australia (8.6), Spain (7.8) and Italy (6.5).

Only 7% of screens showed mainly 'specialised' (ie non-mainstream) programming, with 0.1% dedicated to South Asian films.

Over 98% of all screens in the UK were equipped for digital projection.

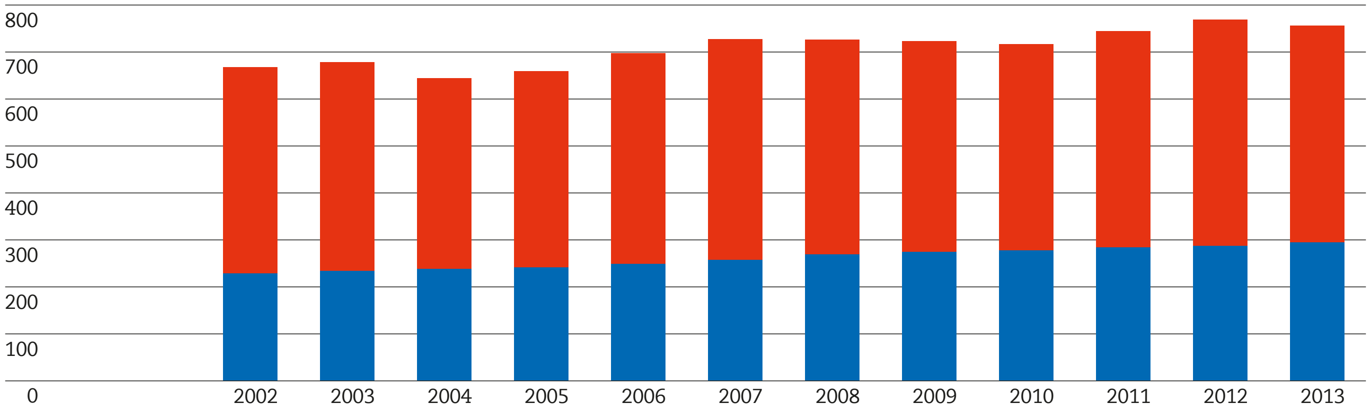
Three quarters of societies responding to the British Federation of Film Societies annual survey reported that membership had stayed at the same level or increased compared with the previous year.

The average ticket price at commercial cinemas was £6.54.

10.1 UK cinema sites

Figure 10.1 shows the number of cinema sites in the UK from 2002 to 2013. The total number of sites has fluctuated over the period with a low of 644 in 2004 and a high of 769 in 2012. There were 756 cinemas in the UK in 2013. The number of purpose-built multiplex sites, however, has steadily risen from 229 in 2002 to 295 in 2013. Multiplexes made up 39% of all cinema sites in 2013.

Figure 10.1 UK cinema sites by type of site, 2002-2013



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Multiplex	229	234	238	242	249	258	269	275	278	285	288	295
Traditional and mixed use	439	444	406	417	448	469	457	448	438	460	481	461
Total sites	**668**	**678**	**644**	**659**	**697**	**727**	**726**	**723**	**716**	**745**	**769**	**756**
% multiplex sites	34	35	37	37	36	35	37	38	39	38	37	39

Source: Dodona Research, BFI RSU analysis

Notes:
Data on cinema sites before 2002 are not available.
Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.

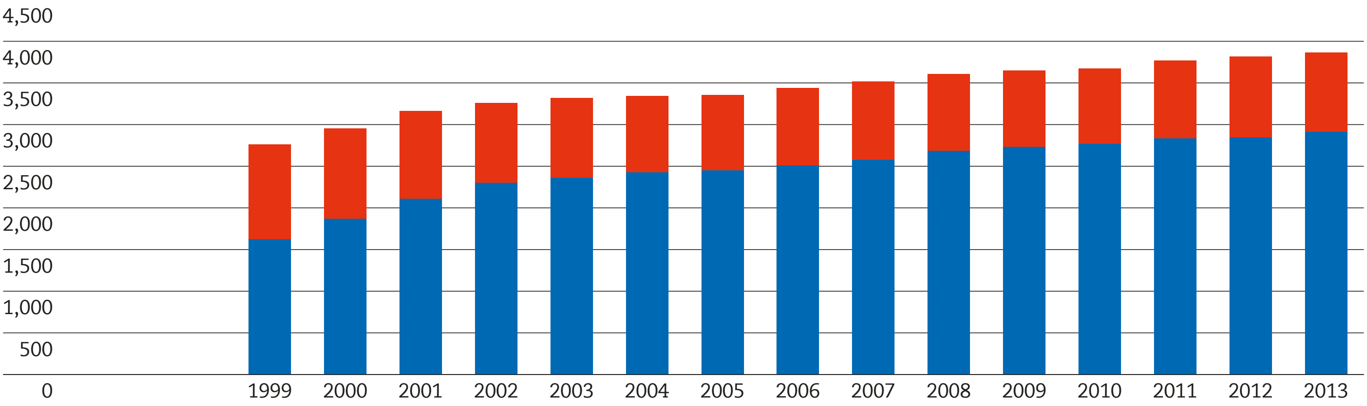
10.2 UK screens

As Figure 10.2 shows, the total number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) has increased every year since 1999. In 2013 the total number of screens stood at 3,867, an increase of 50 compared with 2012.

The UK has gained 1,273 multiplex screens (see definition in the note to Figure 10.1) since 1999 and lost 182 traditional or mixed use screens (mixed use screens are used for film screenings only part of the time). The percentage of multiplex screens increased from 59% in 1999 to 75% in 2009, and this proportion has been maintained since then.

Figure 10.2 UK cinema screens by type of cinema, 1999-2013

Number of screens



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Multiplex	1,624	1,874	2,115	2,299	2,362	2,426	2,453	2,512	2,578	2,689	2,735	2,767	2,833	2,851	2,915
Traditional and mixed use	1,134	1,080	1,049	959	956	916	904	928	936	921	916	904	934	966	952
Total screens	**2,758**	**2,954**	**3,164**	**3,258**	**3,318**	**3,342**	**3,357**	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**
% multiplex sites	58.9	63.4	66.8	70.6	71.2	72.6	73.1	73.0	73.4	74.5	74.9	75.4	75.2	74.7	75.4

Source: Dodona Research, BFI RSU analysis

Notes: See note to Figure 10.1.

10.3 Screen location

In 2013, 94% of all screens in the UK were located in town or city centres, edge of centre, 'out of town' or suburban locations.

Table 10.1 shows 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. In 2013, there was one screen fewer in suburban locations compared with 2012 but an increase in the numbers of screens in all other locations.

Table 10.1 Screens by location, 2003-2013

Location	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	% change 2011-2012	Average no. of screens per site
Town/city centre	1,470	1,502	1,495	1,555	1,616	1,683	1,732	1,726	1,785	1,848	1,866	1.0	4.0
Out of town	1,234	1,243	1,250	1,262	1,284	1,303	1,297	1,311	1,335	1,310	1,328	1.4	9.8
Edge of centre	464	465	479	478	486	499	498	506	518	523	534	2.1	9.1
Suburban	33	33	38	40	30	30	27	28	28	27	26	-3.7	1.9
Rural	117	99	95	105	98	95	97	100	101	109	113	3.7	1.4
Total	**3,318**	**3,342**	**3,357**	**3,440**	**3,514**	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**1.3**	**5.1**

Source: Dodona Research, BFI RSU analysis

10.4 Screen density and admissions per person – 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. In 2013, the UK figure was 6.1 screens per 100,000 people, the same as in 2012. This level of access to screens falls short of the numbers in other major film territories: USA (12.4), France (9.1), Australia (8.6), Spain (7.8) and Italy (6.5). Germany's screen density, of 5.7 screens per 100,000 people, is slightly less than the UK's (source: IHS).

Table 10.2 shows the numbers of admissions per person in a number of major film territories. The UK saw more admissions per person (2.6) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the major territories, the USA (3.8) and Australia (3.7) had the highest admissions per person.

Table 10.2 Admissions per person in major film territories, 2003-2013

	USA	Australia	France	**UK**	Spain	Italy	Germany
2003	4.8	4.5	3.0	**2.8**	3.2	1.5	1.8
2004	4.6	4.5	3.4	**2.9**	3.3	1.7	1.9
2005	4.3	4.0	3.0	**2.7**	2.9	1.5	1.5
2006	4.3	4.0	3.2	**2.6**	2.7	1.6	1.7
2007	4.3	4.0	3.0	**2.7**	2.6	1.7	1.5
2008	4.1	3.9	3.2	**2.7**	2.3	1.7	1.6
2009	4.2	4.1	3.4	**2.8**	2.4	1.6	1.8
2010	4.0	4.1	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	3.9	3.7	3.4	**2.7**	2.0	1.5	1.7
2013	3.8	3.7	3.2	**2.6**	1.7	1.6	1.6

Source: IHS

10.5 Screen density and admissions per person 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 2013 using these television regions are presented in Table 10.3. Although London had the highest numbers of screens and sites, its screen density at 6.7 screens per 100,000 people was lower than that of Northern Ireland (11.1) and Central Scotland (6.8) and only slightly higher than Wales and West (6.5) and South West (6.4). The North East had the lowest screen density (4.6) among all ISBA regions.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 10.3 Screens and admissions by ISBA TV region, 2013 (ranked by screens per 100,000 people)

ISBA TV region	Screens	% of total screens	Sites	Population (000)*	Screens per 100,000 people	Admissions (000)	Admissions per screen	Admissions per person
Northern Ireland	200	5.2	28	1,798	11.1	5,838	29,190	3.2
Central Scotland	247	6.4	39	3,626	6.8	11,476	46,460	3.2
London	860	22.2	158	12,898	6.7	42,201	49,071	3.3
Wales and West	317	8.2	74	4,876	6.5	11,542	36,411	2.4
South West	117	3.0	38	1,836	6.4	4,033	34,473	2.2
Lancashire	444	11.5	64	7,151	6.2	16,400	36,938	2.3
Northern Scotland	80	2.1	20	1,296	6.2	3,849	48,114	3.0
Southern	340	8.8	80	5,629	6.0	15,550	45,736	2.8
Border	35	0.9	18	610	5.7	1,267	36,204	2.1
Midlands	558	14.4	104	10,133	5.5	22,467	40,263	2.2
Yorkshire	314	8.1	56	5,980	5.3	13,426	42,759	2.2
East of England	221	5.7	50	4,299	5.1	11,144	50,424	2.6
North East	134	3.5	27	2,913	4.6	6,346	47,355	2.2
Total	**3,867**	**100.0**	**756**	**63,044**	**6.1**	**165,540**	**42,808**	**2.6**

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

Notes:
* Beacon Dodsworth population estimates based on Census data 2011.
Figures may not sum to totals due to rounding.

Table 10.4 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 of the four UK nations in 2013 (11.0), followed by London (7.5) and the South West, the South East and Scotland (all 6.4).

Table 10.4 Screens and population in the nations and regions, 2013 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (in 000)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	200	5.2	28	1,824	11.0	7.1
London	619	16.0	112	8,308	7.5	5.5
South West	343	8.9	89	5,340	6.4	3.9
South East	559	14.5	123	8,725	6.4	4.5
Scotland	338	8.7	66	5,314	6.4	5.1
Wales	195	5.0	49	3,074	6.3	4.0
North West	447	11.6	67	7,084	6.3	6.7
West Midlands	304	7.9	53	5,643	5.4	5.7
Yorkshire and The Humber	270	7.0	48	5,317	5.1	5.6
North East	129	3.3	24	2,602	5.0	5.4
East Midlands	213	5.5	43	4,568	4.7	5.0
East of England	233	6.0	50	5,907	3.9	4.7
Others**	17	0.4	4	n/a	n/a	4.3
Total	**3,867**	**100.0**	**756**	**63,705**	**6.1**	**5.1**

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

Notes:
* ONS Mid-year population estimates 2012.
** Others include the Channel Islands and the Isle of Man.
n/a = not available.
Figures may not sum to totals due to rounding.

Table 10.4 also shows that Northern Ireland and the North West had the highest averages for screens per site at 7.1 and 6.7 respectively. The South West and Wales along with 'others' (which include 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 others, proportionally fewer multiplex screens (Table 10.5).

10.6 Type of cinema screens by nation and region

Table 10.5 provides a snapshot of variations in multiplex provision around the UK. London had the largest number of multiplex screens (418) in 2013, eight more than the South East. The North West had the highest proportion of multiplex screens (89%) followed by the North East and Northern Ireland. In England the lowest concentration of multiplex screens was found in the South West (58%), which had a high number of traditional and mixed use screens (the third highest after London and the South East). The proportion of multiplex screens for England as a whole was 75%.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 10.5 Cinema screens by type by nation or region, 2013 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed use	Total
North West	397	88.8	50	447
North East	110	85.3	19	129
Northern Ireland	170	85.0	30	200
Yorkshire and The Humber	221	81.9	49	270
East Midlands	167	78.4	46	213
Wales	151	77.4	44	195
West Midlands	234	77.0	70	304
Scotland	257	76.0	81	338
East of England	172	73.8	61	233
South East	410	73.3	149	559
London	418	67.5	201	619
South West	198	57.7	145	343
Others*	10	58.8	7	17
Total	**2,915**	**75.4**	**952**	**3,867**

Source: Dodona Research, BFI RSU analysis

Note: * Others include the Channel Islands and the Isle of Man.

10.7 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 10.6 shows that by far the majority of screens chiefly show mainstream films. In 2013, 586 cinemas with 3,598 screens showed mostly mainstream films (a 1% decrease in the number of sites and a 2% increase in the number of screens compared with 2012). There were 168 sites (with 265 screens, 7% of screens) showing mainly specialised films and two cinemas (with four screens, 0.1% of screens) dedicated mainly to South Asian films. The number of screens showing mostly specialised films decreased by 1% in 2013 and the number of sites decreased by 5%.

Table 10.6 Sites and screens by programme, 2005-2013

	Sites								
Programme	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Asian	5	5	4	4	4	3	3	3	2
Specialised	132	157	177	168	168	163	171	177	168
Mainstream	522	535	546	554	551	550	571	589	586
	Screens								
Programme	2005	2006	2007	2008	2009	2010	2011	2012	2013
South Asian	18	18	10	10	10	7	7	7	4
Specialised	206	231	255	250	253	248	259	268	265
Mainstream	3,133	3,191	3,249	3,350	3,388	3,416	3,501	3,542	3,598

Source: Dodona Research, BFI RSU analysis

The majority (64%) of specialised screens were found in single, independent cinemas (ie not part of a chain). The percentage is lower than in 2012, when 68% of specialised screens were based in independent cinemas.

The pattern of programme type by location in 2013 is shown in Table 10.7. Screens showing mostly South Asian films were located in town or city centres and suburban areas, while those devoted to specialised film were mainly found in town or city centres. The overall pattern remained similar to earlier years.

Table 10.7 Percentages of screens by location and programme, 2013

Location	Mainstream	Specialised	South Asian	Total
Town/city centre	45.6	84.2	50.0	48.3
Out of town	36.7	2.6	–	34.3
Edge of centre	14.7	1.5	–	13.8
Suburban	0.4	3.0	50.0	0.7
Rural	2.5	8.7	–	2.9
Total	**100.0**	**100.0**	**100.0**	**100.0**

Source: Dodona Research, BFI RSU analysis

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

This geographical analysis is extended in Table 10.8, 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 43% of the UK total in 2013. The South West had 29 specialised screens and Scotland 27, accounting for 11% and 10% respectively, of such screens. Northern Ireland (0.8%), the North East (2.6%) and Wales (3.4%) had the smallest percentages of specialised screens. Figure 10.3 shows the location of the 168 cinemas containing specialised screens.

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

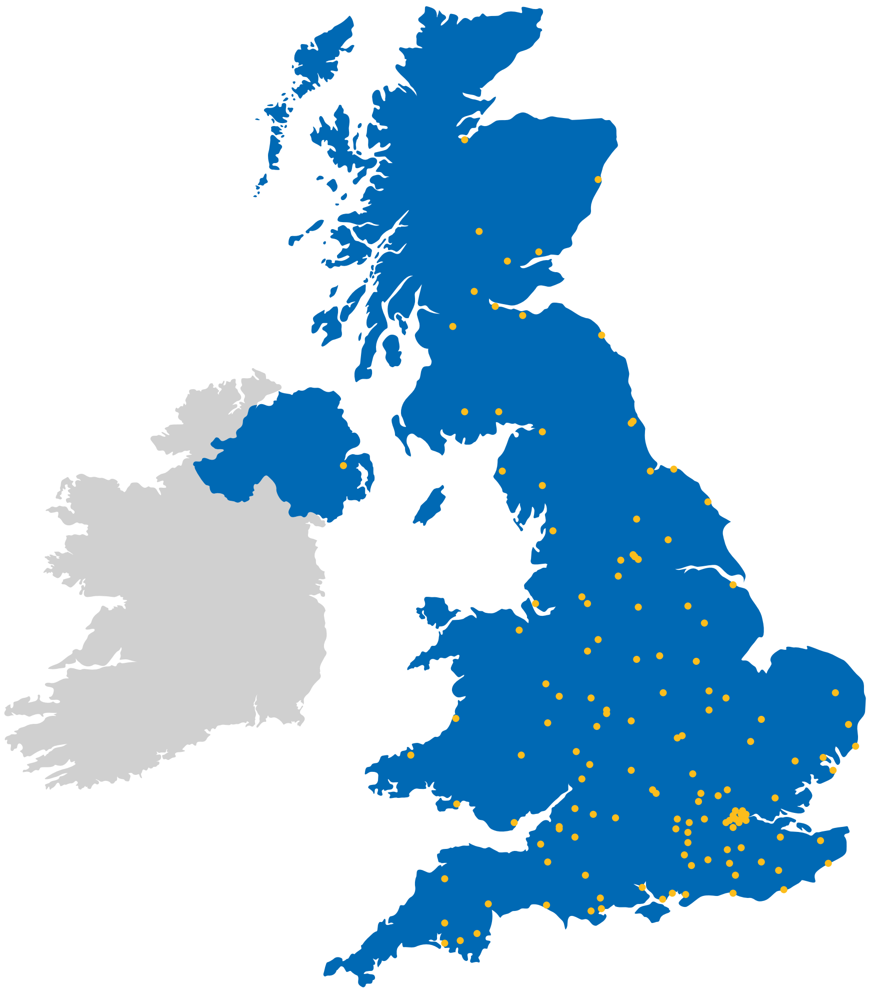
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 10.8 Geographical spread of specialised screens, 2013

Nation/region	Specialised screens	%
London	76	28.7
South East	38	14.3
South West	29	10.9
Scotland	27	10.2
Yorkshire and The Humber	19	7.2
East of England	17	6.4
East Midlands	16	6.0
West Midlands	14	5.3
North West	11	4.2
Wales	9	3.4
North East	7	2.6
Northern Ireland	2	0.8
Total	**265**	**100.0**

Source: Dodona Research, BFI RSU analysis

Figure 10.3 Location of specialised screens, 2013



Source: Dodona Research, BFI RSU analysis

10.8 Exhibitors

The number of exhibitors that owned or programmed 20 or more screens in the UK was 10 at the end of January 2014 (the same number and the same exhibitors as at the end of January 2013), as shown in Table 10.9.

At the start of 2014, the five largest exhibitors owned 75% of all UK screens.

Table 10.9 Cinema screens by exhibitors with 20+ screens, 2013

Exhibitor	Sites	Screens	% of total screens
Odeon	115	881	22.8
Cineworld	81	807	20.9
Vue	82	776	20.1
National Amusements	20	264	6.8
Empire Cinemas	16	155	4.0
Omniplex (Anderson)	11	89	2.3
Reel Cinemas	15	62	1.6
Cineworld/Picturehouse	22	61	1.6
Movie House Cinemas	5	39	1.0
Merlin Cinemas	11	35	0.9
Others (21 major exhibitors and 306 independent single venue exhibitors)	378	698	18.1
Total	**756**	**3,867**	**100.0**

Source: Dodona Research

Notes:
Figures correct as at January 2014.
Percentages may not sum to 100 due to rounding.
The Odeon chain was owned by Terra Firma Capital Partners, a European private equity firm.
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.
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.

10.9 Exhibitor revenues

Dodona Research reports that exhibitors' revenues from concession sales were £289.7 million in 2013, a 2% decrease from 2012's £296.7 million. Advertising income also decreased year on year, from £83.7 million in 2012 to £79.5 million in 2013. The top five exhibitors had an 81% share of gross box office in the UK and Republic of Ireland in 2013, and more than 70% of the box office was shared between the top three exhibitors (Table 10.10).

Average ticket prices, calculated by dividing the UK-only box office gross for the year (£1,083 million) by total UK admissions (165.5 million), rose from £6.37 in 2012 to £6.54 in 2013, an increase of 3%.

Table 10.10 Exhibitor share of box office in the UK, 2013

Exhibitor	Market share (%)	Box office gross (£ million)
Cineworld	25.5	299.2
Odeon	23.9	281.3
Vue	22.2	261.2
National Amusements	5.8	68.6
Empire Cinemas	3.8	45.0
Sub-total	81.3	955.3
Others	18.7	220.2
Total	**100.0**	**1,175.6**

Source: Dodona Research and Rentrak

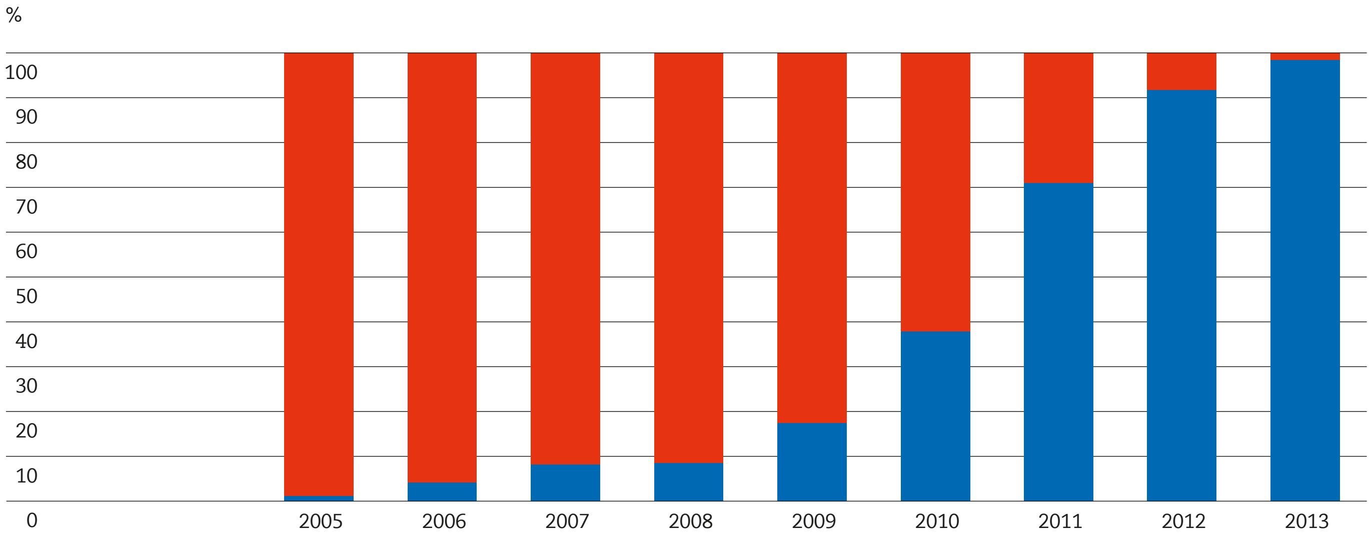
Note: Figures/percentages may not sum to totals/sub-totals due to rounding.

10.10 Digital projection

10.10.1 Digital screens

According to IHS, the number of digital screens in the UK increased by 8% (to 3,836) between 2012 and 2013, so that by the end of the year just over 98% of all screens in the UK were equipped for digital projection. Figure 10.4 shows the percentage of digital screens in the UK since 2005.

Figure 10.4 Percentage of digital screens, 2005-2013



	2005	2006	2007	2008	2009	2010	2011	2012	2013
Digital	1.1	4.1	8.2	8.5	17.4	37.8	71.0	91.7	98.4
Analogue	98.9	95.9	91.8	91.5	82.6	62.2	29.0	8.3	1.6

Source: IHS

10.10.2 Accessible cinema

In the UK all digitally-equipped cinemas have English language subtitle and audio description (ST/AD) facilities. Almost every multiplex cinema, and many smaller cinemas (around 400 cinemas, more than half of all cinemas in the UK), regularly screen the latest popular releases with on-screen English language captions. There are around 1,000 such screenings weekly. Due to the expansion of digital cinema, the last five years has seen the weekly number of subtitled screenings increase by 120%.

Data from 'YourLocalCinema.com' shows that in 2013, 169 English language films were shown in UK cinemas with subtitles (84% of wide release titles), and 153 were shown with audio description (76% of wide release titles).

Over the last decade more than 1,000 individual titles have been made available, including almost all of the top 10 films of each year. At any one time, nine or 10 of the weekly top 10 films are available with subtitles and/or audio description. All the top 20 films at the UK box office in 2013 had ST/AD tracks.

Although access has improved significantly over the last few years, there is an opportunity for further development so that more cinema-goers with hearing or sight loss can enjoy more of the latest films at the cinema, in particular the smaller specialised and independent releases. Exhibitors are exploring the potential of personal access solutions, where the subtitles are not visible on the screen but displayed on wearable glasses (a system currently available at some sites in the USA) or shown on small seat-mounted displays (a system available across sites in Australia).

10.10.3 3D and event cinema

Of the 3,868 digital screens in the UK in 2013, 1,655 (43%) were 3D-capable digital screens. Some of the popular 3D screenings in 2013 included *Gravity, Despicable Me 2, The Hobbit: The Desolation of Smaug* and *Oz the Great and Powerful*.

Table 10.11 shows the increasing number of 3D digital screens in the UK. The growth in 3D screens coincided with an increase in the availability of 3D content internationally. Three more 3D films were released in 2013 than in 2012 (43 in 2012 and 46 in 2013), and these included 14 of the year's top 20 films.

Table 10.11 3D digital screens in the UK, 2006-2013

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
2006	5	148	3.4	Tim Burton's The Nightmare Before Christmas 3-D
2007	47	296	15.9	Beowulf
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

Source: IHS, Rentrak, 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 over the past five years in the UK as more cinemas become equipped with digital screens. The availability of a digital screen base has widened the range of content on the big screen, allowed interactivity between the screen and the audience and potentially improved the use of auditorium capacity during typically quiet periods. Also, since events usually have only one or two screenings they can often generate higher occupancy rates than feature films.

Table 10.12 shows the numbers of events and box office takings by type of event screened in 2013. According to Rentrak there were 111 events screened in 2013 which took a total of £18.7 million at the box office. Opera has proved consistently popular since alternative content events were first screened, and in 2013 more operas were screened (44) than any other single type of event, generating a total box office of £4.8 million. Opera was second in the box office rankings, however, after theatre, which took £7.2 million from just 14 events. The difference in total box office from theatre events and operas could be at least partly explained by the higher average WPR for theatre (198 for theatre and 93 for opera). In 2013 events broadcast included six museum exhibitions, and four live shows from Comedy Store venues in London and Manchester.

Table 10.12 Numbers and box office takings of events screened in UK cinemas by type of event, 2013

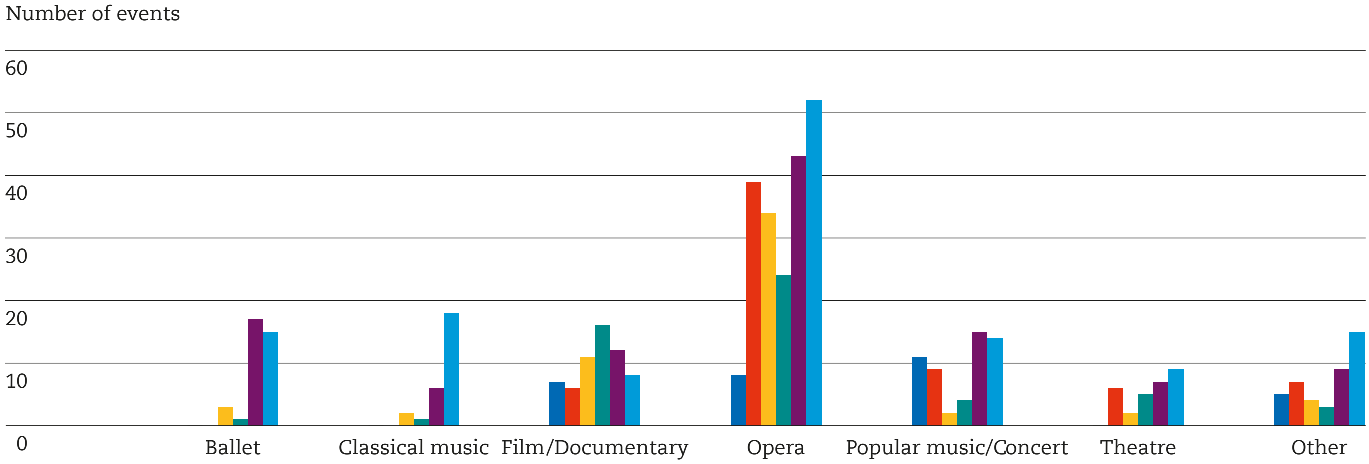
Type of event	Number of events	% of events	Box office (£ million)	% box office	Average WPR
Theatre	14	12.6	7.2	38.3	198
Opera	44	39.6	4.8	25.7	93
Film/documentary	10	9.0	2.2	11.7	101
Ballet	17	15.3	2.1	11.3	100
Exhibition	6	5.4	0.9	5.0	135
Classical concert	8	7.2	0.9	4.9	83
Popular music concert	8	7.2	0.5	2.9	116
Comedy	4	3.6	<0.1	0.2	78
Total	**111**	**100.0**	**18.7**	**100.0**	**111**

Source: Rentrak

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

As mentioned above, the data in Table 10.12 are from Rentrak, who now track box office for events as well as for films. In previous editions of the Yearbook data on event cinema have been provided by IHS. Figure 10.5 shows the numbers of events, by type of event, from 2007 to 2012, using IHS's data. Because of methodological differences in data collection between IHS and Rentrak, the 2013 figures shown above are not included in the chart.

Figure 10.5 Events screened in UK cinemas by type of event, 2007-2012



	Ballet	Classical music	Film/Documentary	Opera	Popular music/Concert	Theatre	Other
2007	0	0	7	8	11	0	5
2008	0	0	6	39	9	6	7
2009	3	2	11	34	2	2	4
2010	1	1	16	24	4	5	3
2011	17	6	12	43	15	7	9
2012	15	18	8	52	14	9	15

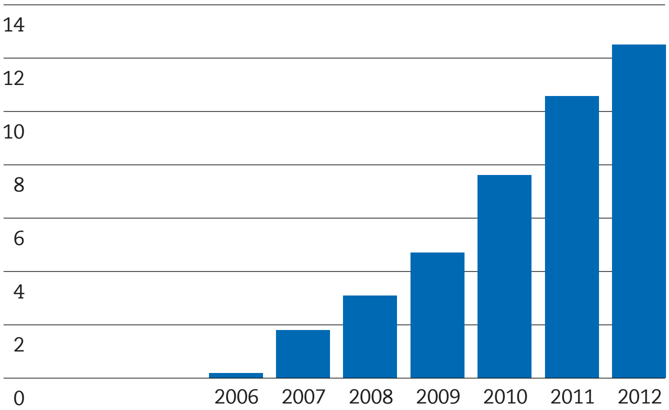
Source: IHS

Notes:
Figures include live and recorded events.
'Film' includes film screenings followed by a live 'question and answer' session.

Figure 10.6 shows revenues from events from 2006 to 2012. Again, because the 2013 data are from a different source than the earlier data, 2013 revenues are not included in the chart.

Figure 10.6 Revenues from alternative content events screened in UK cinemas, 2006-2012

£ million



	2006	2007	2008	2009	2010	2011	2012
Alternative content revenue	0.2	0.8	3.1	4.7	7.5	10.5	12.5

Source: IHS

10.11 Community cinema in the UK

The screening of feature films in the UK is not limited to cinemas belonging to the major cinema operators. There is a thriving sector of voluntary providers which makes a wide variety of films available to local communities which often have less access to commercial cinemas. This sector is often referred to as community cinema. Members of local communities are generally more involved in the programming of such cinemas than in the programming of the commercial counterparts. Screenings of films in this sector are in venues such as village halls, mixed arts spaces, independent cinemas and the like.

The British Federation of Film Societies (BFFS) has surveyed its members on an annual basis since 2005/06 in order to measure the size, composition and geographical distribution of the community cinema sector in the UK. Here we present a summary of the key findings from the 2012/13 survey.

While many film societies and community cinemas have been in existence over a long period, new ones are established all the time. Six out of 10 (61%) of the responding organisations in the latest survey were established in 2000 or later, while 12% were established in the 1960s or earlier.

Most of the film societies that responded (76%) operated a membership system in 2012/13 (74% in 2011/12) and the average membership size was 154, but there was a wide range of membership sizes. The smallest membership was five and the largest was 1,550. The total membership of responding societies stood at 12,452. Membership of film societies remains popular. Less than one quarter of respondents (24%) had fewer members than in the previous year.

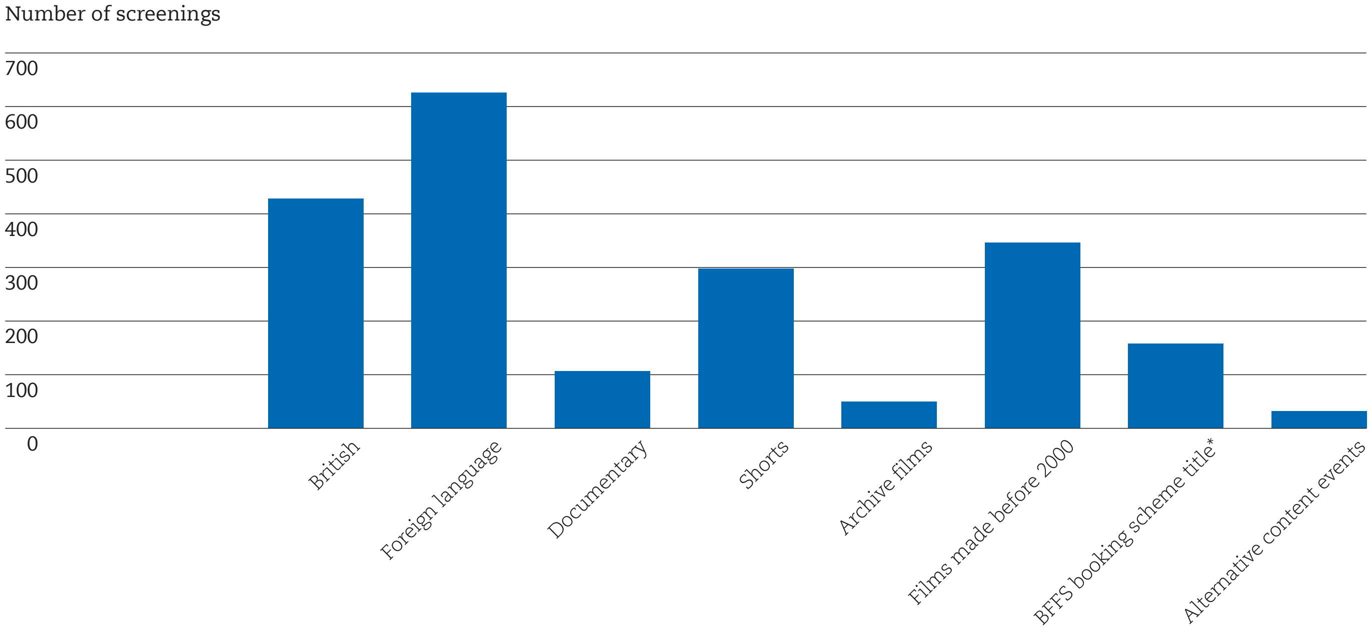
The average full annual membership fee was £23.59 (down from £25.91 in 2011/12). Just under half (46%) of societies that operated a membership system charged an additional admission fee. The average charge was £4.15. Less than one quarter (22%) of responding societies offered season tickets (27% in 2011/12). The average season ticket price was £30.00 and charges ranged from £10 to £55.00. The average number of season ticket holders in responding societies was 81 (75 in 2011/12).

Most societies (86%) were open to non-members for a charge on the door. The average admission fee for non-members was £5.09 (the average ticket price for commercial cinemas in 2013 was £6.54).

The responding organisations programmed a total of 704 different titles across 4,175 screenings during the 2012/13 season. British films accounted for 10% of the titles screened, and 15% of the films shown were in a foreign language (compared with 28% in 2011/12). More than two thirds (73%) of titles were screened by only one film society (the same as in 2011/12), indicating the diversity of programming choices made by individual societies. However, some titles proved popular choices across many film societies, and 18 films were programmed by 10 or more responding societies. Figure 10.7 shows the number of screenings by category of film. Titles sourced via the BFFS booking scheme accounted for 158 screenings.

Alternative content (via satellite or events recorded and delivered on Blu-ray) is increasingly available to community cinemas, and 32 events were screened by responding societies during 2012/13.

Figure 10.7 Number of film society/community cinema screenings by type, 2012/13



	British	Foreign language	Documentary	Shorts	Archive films	Films made before 2000	BFFS booking scheme title*	Alternative content events
2012/13	428	626	107	298	50	346	158	32

Source: BFFS

Notes:
* The booking scheme provides BFFS members with access to a catalogue of over 700 non-mainstream films.
Figures include both film societies and community cinemas.

Of the 18 films programmed by 10 or more responding societies in 2012/13, four were British, and four were in a foreign language. The three most programmed films were French silent film *The Artist* followed by *A Separation* (in Farsi) and *The Best Exotic Marigold Hotel* (in English). Both *The Artist* and *A Separation* were first released in commercial cinemas in the UK in 2011 and *The Best Exotic Marigold Hotel* was released in 2012. Over half (57%) of all responding organisations held special events (eg screenings with guest appearances by the filmmakers, film themed social events, etc) in addition to regular screenings in 2012/13.

The average audience size in 2012/13 was 67 (66 in 2011/12), and the sum total of all admissions from responding organisations was 212,796. Nearly half (46%) of community cinemas saw an increase in their annual admissions compared with 2011/12, and 40% recorded roughly the same number.

The most commonly used format for screenings was DVD (used 'usually' or 'sometimes' by 92% of responding organisations), but the shift towards the use of Blu-ray reported last year continued in 2012/13. In 2010/11 almost half of respondents (49%) never used Blu-ray, but this fell to 29% in 2011/12 and fell further to 26% in 2012/13. This format was 'usually' used for screening purposes by 30% of respondents, up from 26% in 2011/12, while 44% 'sometimes' screened using Blu-ray. Other formats are still used by some societies. VHS was 'sometimes' used by 6% of responding organisations, 35mm projection was 'usually' used by 12%, and 2% of respondents 'sometimes' used 16mm projection.

New digital screening formats are becoming increasingly available to community cinema providers, and their use continues to grow. Screenings via digital cinema were 'usually' or 'sometimes' used by 24% of respondents (compared with 10% in 2010/11 and 16% in 2011/12), and 8% 'sometimes' used online downloads/streaming.

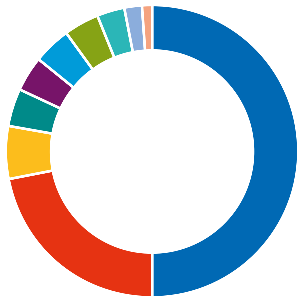
Figure 10.8 shows the percentage share of film society/community cinema admissions by nation and region in 2012/13. The South East accounted for half of the total annual admissions from responding societies (compared with 9% of admissions to commercial cinemas in the Southern ISBA region in 2013 – see Table 10.3). The South West region, which has a strong community cinema sector, accounted for 21% of film society/community cinema admissions, while the South West ISBA region accounted for just 2% of the UK's commercial cinema admissions in 2013. Conversely only 3% of film society admissions

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

were in London, compared with the London ISBA region's 25% share of commercial cinema admissions. This provides evidence that community exhibitors enhance the provision of film in communities that have limited access to commercial cinemas.

Figure 10.8 Share of film society/community cinema admissions by nation and region, 2012/13

Nation/region	%
South East	50
South West	22
East of England	6
North West	4
East Midlands	4
Scotland	4
Yorkshire and The Humber	4
London	3
Wales	2
North East	1
West Midlands	n/a
Northern Ireland	n/a



Source: BFFS

10.12 Film festivals

In addition to commercial and community cinemas, many films find an audience through film festivals. According to the Independent Cinema Office (ICO), there were more than 100 film festivals in the UK in 2013. The festivals encompassed many themes and genres, eg animation, horror, sci-fi, shorts and films from a particular country or in a particular language. Examples include the Birds Eye View Film Festival (which showcases and explores the contribution of women in film), Deaffest (which celebrates the talents of deaf filmmakers), Sheffield Doc/Fest, the Horror-on-Sea Film Festival, the Hippodrome Festival of Silent Cinema and the Aesthetica Short Film Festival. The festivals also took place in many parts of the UK but available information shows that the highest attendances were at large city festivals. The biggest festivals, in terms of admissions, were the London Film Festival, followed by the Edinburgh International Film Festival and the Glasgow Film Festival.

- For more on cinema admissions and box office see Chapter 1 (page 10)
- For more on 3D films see Chapter 2 (page 21)
- For more on specialised films see Chapter 5 (page 49)
- For more on cinema audiences see Chapter 15 (page 157)
- For employment in the exhibition sector see Chapter 22 (page 232)

- For more on accessible cinema see www.yourlocalcinema.com
- Website for British Federation of Film Societies (BFFS): www.bffs.org.uk
- Website for the Independent Cinema Office (ICO): http://www.independentcinemaoffice.org.uk/

Image: ***The Twilight Saga: Breaking Dawn – Part 2*** **courtesy of eOne Films**

Chapter 11

Film on physical video

Despite falling revenues, particularly in the rental market, physical video remains a crucial element of the film value chain. In 2013, feature film video sales and rentals in the UK generated just over £1.1 billion.

FACTS IN FOCUS:

The combined sales and rental market for all categories of video on physical media in 2013 was more than £1.6 billion (over £1.4 billion in sales and £197 million from rentals); feature film on video accounted for just over £1.1 billion.

There were 119 million sales of feature film on physical video (127 million in 2012) and 53 million rentals of film on video (78 million in 2012).

Film accounted for 73% of the volume of the video sales market and 65% of the value. UK films accounted for around 24% of all films sold on video.

The most popular purchase on both DVD and Blu-ray disc in 2013 was *Skyfall*.

Online video rental with postal delivery accounted for 69% of all feature film video rental transactions in 2013.

11.1 Film in the retail video market

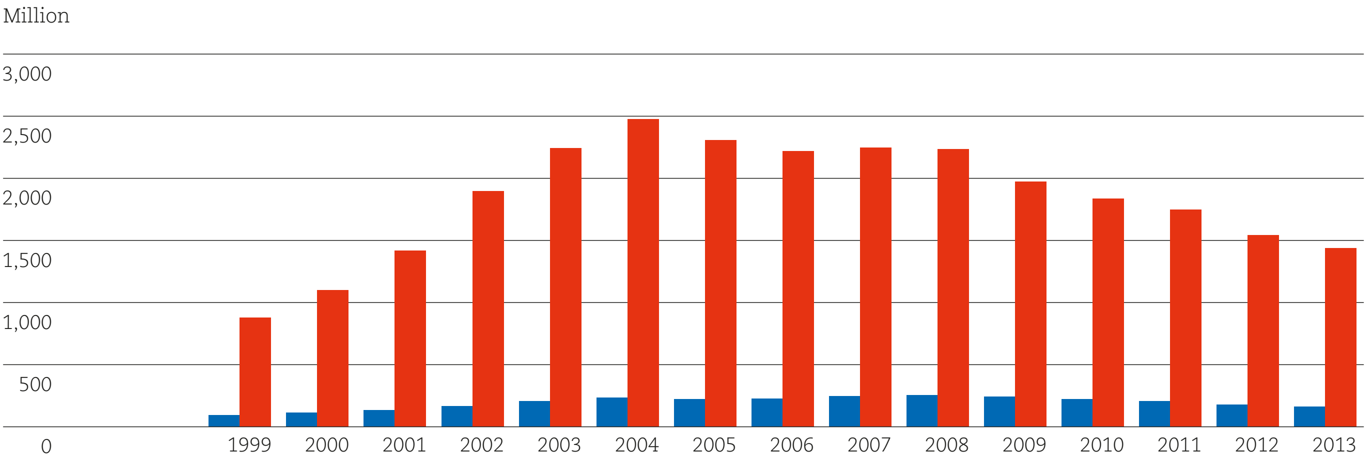
'Video' is used in this chapter as the generic description of all physical video, including DVD, Blu-ray disc and other physical formats, in line with the British Video Association's (BVA) definition, and does not include downloads. (For information on films rented or purchased by download or streaming, see Chapters 12 and 14.)

In 2013, 162 million videos in all categories were sold, down 7% on 2012. As Figure 11.1 shows, the total market value was £1,438 million, down 9% from £1,543 million in 2012. The sales of videos peaked in 2004, and since then the trends for both sales value and volume have been decreasing.

DVDs accounted for the majority of all categories of video sales (82% by value and 88% by volume). Blu-ray disc sales accounted for 17.5% of total video sales by value and 11.6% of sales by volume in 2013 (compared with 14.8% by value and 9.4% by volume in 2012).

Feature film represented approximately 65% of the retail video market by value (£940 million) and 73% by volume (119 million units) in 2013. UK films accounted for around 24% of sales, by volume, of film on video.

Figure 11.1 Retail video sales (all categories), 1999-2013



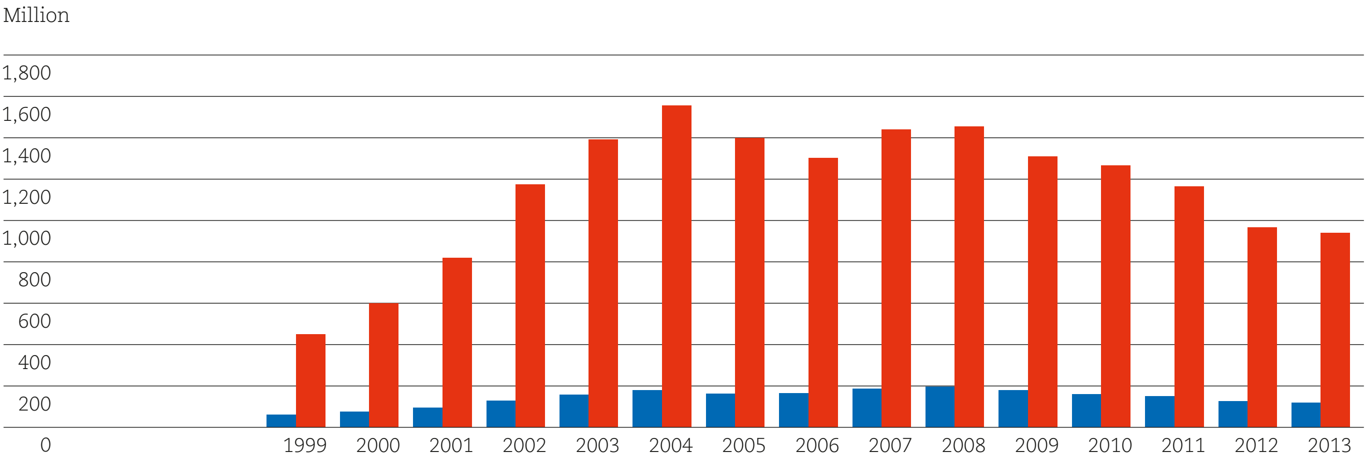
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Volume (million)	96	114	135	169	208	234	222	228	249	257	243	223	207	179	162
Value (£ million)	878	1,101	1,417	1,896	2,245	2,478	2,309	2,219	2,246	2,237	1,975	1,839	1,749	1,543	1,438

Source: BVA, IHS

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

The number of films sold on video more than trebled between 1999 and 2008, from 61 million units to 196 million, before falling in 2009 to 180 million. The decrease in sales has continued since 2009, with 127 million units sold in 2012 and 119 million sold in 2013 (Figure 11.2).

Figure 11.2 Film on video retail sales, 1999-2013



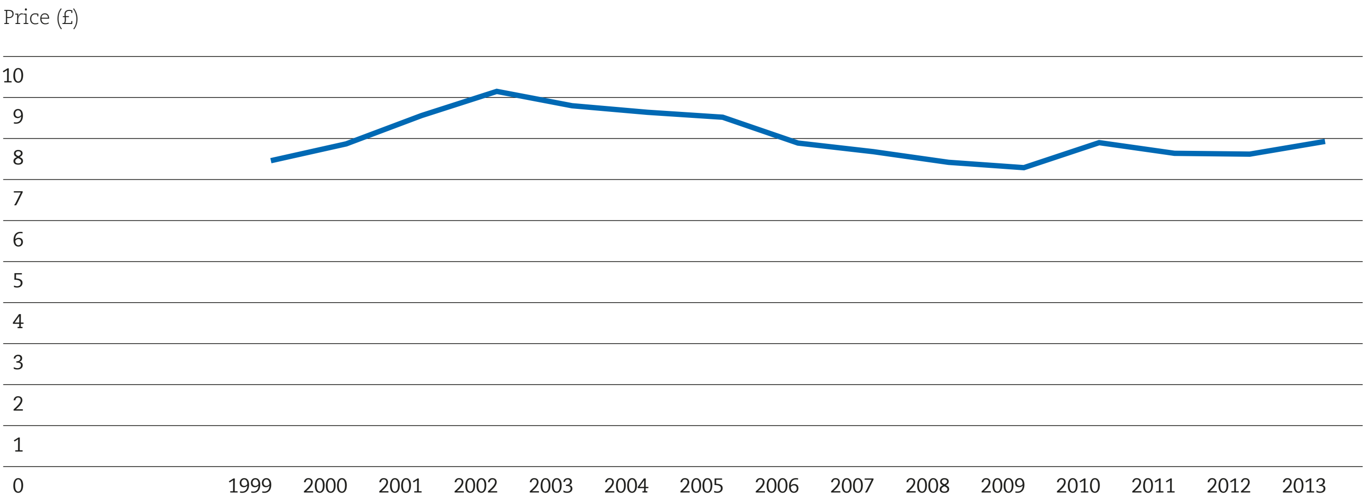
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Volume (million)	61	76	96	128	158	180	164	165	188	196	180	160	152	127	119
Value (£ million)	451	601	821	1,175	1,392	1,557	1,399	1,302	1,440	1,454	1,311	1,267	1,165	968	940

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

Note: Includes some feature films which would be classified as 'children's' videos in the BVA Yearbook.

As Figure 11.3 shows, the average unit price for film on video increased with the introduction of DVD in the late 1990s to reach a peak in 2002, but there was a general downward trend from 2002 to 2009. The average price increased to £7.90 in 2010 compared with 2009's £7.29, and has stayed at similar levels since. In 2013 the average price for film on video was £7.93.

Figure 11.3 Average retail price of film per unit, 1999-2013



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Price (£)	7.46	7.87	8.56	9.15	8.80	8.64	8.52	7.89	7.68	7.42	7.29	7.90	7.64	7.62	7.93

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

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 11.1 shows the top selling films on video in 2013. At the top of the list is *Skyfall,* which was the highest grossing film at the UK box office in 2012. In second place is another successful 2012 release, *The Hobbit: An Unexpected Journey,* with *Les Misérables* in third place.

Five of the top 10 selling films on video were titles released theatrically in 2013, and the other five (*Skyfall* and *The Hobbit: An Unexpected Journey,* as mentioned above, plus *The Twilight Saga: Breaking Dawn – Part 2, Taken 2* and *Life of Pi*) were released in 2012. None of the 2012 theatrical releases appeared in the top 10 selling films on video in 2012.

Skyfall was also the highest selling film on Blu-ray disc in 2013, followed by *The Hobbit: An Unexpected Journey* and *Star Trek Into Darkness.*

Table 11.1 Top 10 best selling films on physical video formats, 2013

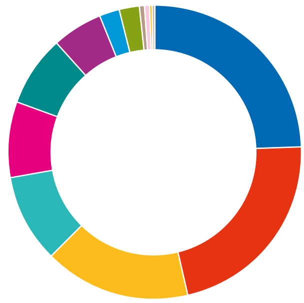
	Title	Country of origin	Distributor
1	Skyfall	UK/USA	20th Century Fox
2	The Hobbit: An Unexpected Journey	USA/NZ	Warner Bros
3	Les Misérables	UK/USA	Universal
4	The Twilight Saga: Breaking Dawn – Part 2	USA	eOne Films
5	Star Trek Into Darkness	USA	Paramount
6	Django Unchained	USA	Sony Pictures
7	Taken 2	Fra	20th Century Fox
8	Life of Pi	USA/Can	20th Century Fox
9	Iron Man 3	USA/China	Walt Disney
10	Man of Steel	USA/Can	Warner Bros

Source: Official Charts Company, BVA

Action/adventure was the highest selling genre of films sold on video in 2012, accounting for 25% of the market (21% in 2012) as Figure 11.4 shows. Comedy was the next most popular with 22% of all sales, followed by drama with 16%. In 2012, comedy was the highest selling genre with a 21% share with action/adventure second. (It should be noted that these categories, as defined by the BVA, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in Chapter 4.)

Figure 11.4 Sales breakdown by film genre, 2013

Genre	%
Action/adventure	24.6
Comedy	22.0
Drama	16.1
Family	9.8
Thriller	8.3
Sci-fi	7.8
Horror	5.4
War	2.4
Musical	2.1
Western	0.7
Documentary	0.6
Anime	0.2
Adult	0.1



Source: Official Charts Company, BVA

Note: These genres are assigned by the BVA and the categories are not the same as those from Chapter 4.

The list of the top 10 UK qualifying films on sell-through video in 2013 features just two titles which are also in the overall top 10 for the year (Table 11.2). These are *Skyfall* and *Les Misérables*, which were the highest earning UK films at the UK box office in 2012 and 2013 respectively. Five of the top 10 UK films on video are independent films, including the documentary *The Class of '92*. This film was shown in UK cinemas in 2013, but it has not been included in the box office chapters of the Yearbook as Rentrak reported its screenings as event cinema rather than as a film release.

Three of the films in the list of top selling UK films on video (*Skyfall*, *Fast & Furious 6* and *Dredd*) also appear in the BVA's list of top 20 selling films on Blu-ray disc in 2013.

Table 11.2 Top 10 best selling UK qualifying films on physical video formats, 2013

	Title	Country of origin	Distributor
1	Skyfall	UK/USA	20th Century Fox
2	Les Misérables	UK/USA	Universal
3	Fast & Furious 6	UK/USA	Universal
4	World War Z	UK/USA	Paramount
5	Dredd	UK/USA/SA	Entertainment in Video
6	The Class of '92	UK/USA	Universal
7	The Best Exotic Marigold Hotel	UK/USA/Ind	20th Century Fox
8	The Sweeney	UK	eOne Films
9	Quartet	UK	eOne Films
10	The World's End	UK/USA	Universal

Source: BFI RSU analysis of Official Charts Company data

The list of top 10 UK independent films sold on video in 2013 is topped by *Dredd* and *The Class of '92* followed in third place by *The Best Exotic Marigold Hotel* (Table 11.3). Four of the films in the list (*The Class of '92, Quartet, Alan Partridge: Alpha Papa* and *Red 2*) were 2013 releases (in the case of *The Class of '92* an event cinema release, according to Rentrak), and the others were released in 2012. *The Best Exotic Marigold Hotel* was the top selling UK independent film on video in 2012 and *The Woman in Black* also appeared in 2012's top 10.

Table 11.3 Top 10 best selling UK independent films on physical video formats, 2013

	Title	Country of origin	Distributor
1	Dredd	UK/USA/SA#	Entertainment in Video
2	The Class of '92	UK/USA#	Universal
3	The Best Exotic Marigold Hotel	UK/USA/Ind#	20th Century Fox
4	The Sweeney	UK	eOne Films
5	Quartet	UK	eOne Films
6	Alan Partridge: Alpha Papa	UK	StudioCanal/Elevation Sales
7	Red 2	UK/USA#	eOne Films
8	Nativity 2: Danger in the Manger!	UK	eOne Films
9	Salmon Fishing in the Yemen	UK	Lionsgate/Elevation Sales
10	The Woman in Black	UK/USA/Swe#	eOne Films

Source: BFI RSU analysis of Official Charts Company data

Dredd, *The Class of '92*, *The Best Exotic Marigold Hotel*, *Red 2* and *The Woman in Black* were made with independent (non-studio) US support.

Table 11.4 shows the top 10 best selling feature documentaries on video in 2013. This list does not include documentaries which are based on music concerts. The top selling documentary on video in 2013 was *The Class of '92*, one of four sport documentaries in the list. In second place is *Senna*, another of the sport documentaries, which was the top selling documentary on video in both 2011 and 2012 and the all time highest grossing non-concert UK documentary at the UK box office. The other two sport documentaries are both about motor cycle racing. *Fastest*, in fourth place, is about the MotoGP World Championship, and *TT3D: Closer to the Edge* is a 3D film about the Isle of Man TT motorcycle races. (*TT3D: Closer to the Edge* was the second highest selling documentary on video in both 2011 and 2012.)

Three films in the list were released theatrically in 2013 (as mentioned above, the release of *The Class of '92* was considered by Rentrak to be event cinema rather than a theatrical release). The other two 2013 releases are *Blackfish* and *The Spirit of '45*. Seven of the top 10 documentaries were UK films.

Table 11.4 Top 10 best selling documentary films on physical video formats, 2013

	Title	Country of origin	Distributor
1	The Class of '92	UK/USA	Universal
2	Senna	UK/USA	Universal
3	The Imposter	UK/USA	Channel 4 DVD
4	Fastest	USA	Universal
5	TT3D: Closer to the Edge	UK	eOne Films
6	African Cats	UK/USA	Walt Disney
7	Blackfish	USA	Dogwoof
8	The Spirit of '45	UK	Dogwoof
9	Catfish	USA	eOne Films
10	Hooligan	UK	eOne Films

Source: BFI RSU analysis of Official Charts Company data

Note: Recordings of music concerts are not included.

Scandinavian titles accounted for five of the top 10 best selling foreign language films on video in 2013, four of which were Nordic noir adaptations: the Millennium trilogy films and *Headhunters* (Table 11.5). There are four French language films on the list: *Untouchable*, the highest grossing foreign language film at the UK box office in 2012, *Rust and Bone*, *Amour* and *Amélie*. (*Amélie* was first released on video in 2002 and was re-released theatrically in 2011 to coincide with its 10th anniversary.) The only non-European language title was *The Raid* (in Indonesian). This film was written and directed by the British filmmaker Gareth Evans.

Six of the films also appeared in the top 10 list in 2012: all three Millennium trilogy films, *Headhunters, The Raid* and *Troll Hunter*. None of the films was released theatrically in the UK in 2013, but *Amour, Rust and Bone* and *Untouchable* were released theatrically late in 2012, and would not have been released on video before 2013.

Table 11.5 Top 10 best selling foreign language films on physical video formats, 2013

	Title	Country of origin	Distributor
1	The Raid	Indonesia/USA	eOne Films
2	Untouchable	Fra	Entertainment in Video
3	The Girl Who Kicked the Hornets' Nest	Swe/Den/Ger	eOne Films
4	The Girl Who Played with Fire	Swe/Den/Ger	eOne Films
5	Rust and Bone	Fra/Bel	Elevation Sales
6	Amour	Aut/Fra/Ger	Artificial Eye
7	Headhunters	Nor/Ger	eOne Films
8	The Girl with the Dragon Tattoo	Swe/Den/Ger	eOne Films
9	Troll Hunter	Nor	eOne Films
10	Amélie	Fra/Ger	eOne Films

Source: BFI RSU analysis of Official Charts Company data

Classic titles, in particular classic family films, also remain popular video purchases, due in part to theatrical re-releases or other events associated with the films. *Finding Nemo* and *Monsters, Inc* both had 3D theatrical re-releases and both sold well on video in 2013. In addition to *Amélie*, discussed above, other theatrical re-releases which sold well on video include *Chinatown, Dial M for Murder* and *Gone with the Wind*. Some classic titles achieve significant sales on video without the help of a theatrical re-release. In 2013, such titles included *E.T. the Extra Terrestrial, The Jungle Book* and *The Sound of Music*.

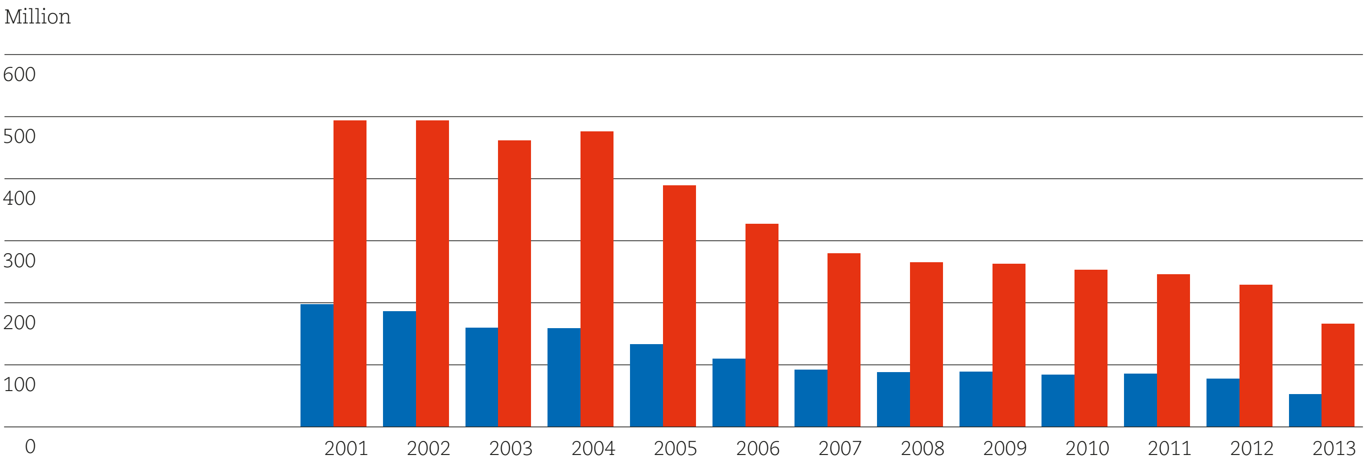
11.2 Film in the video rental market

There were 62 million rental transactions of all categories of physical video in 2013, with a total value of £197 million, including over-the-counter and online rentals.

Film on video rentals in the UK in 2013 totalled 53 million, with an average value of £3.13. Online renting of physical discs (with postal delivery) accounted for 74% of rental transactions of all categories of video, and 69% of film on video rental transactions.

The number of feature film rental transactions in 2013 fell by 32% compared with 2012's 78 million, and the value of the physical rental market fell from £229 million in 2012 to £166 million in 2013. The peak value of the physical rental market was £494 million in both 2001 and 2002, and the current value of the market is one third of that (Figure 11.5). The decrease in the market's value is due mainly to the rapid decline of the over-the-counter rental market in the face of competition from multi-channel television, rental downloads and the availability and low cost of retail physical and digital videos.

Figure 11.5 Film on video rental market, 2001-2013



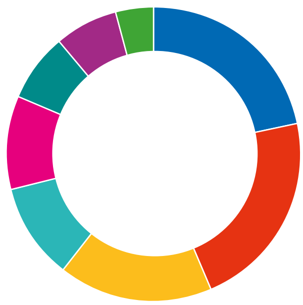
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Transactions (million)	198	183	160	159	133	110	92	88	89	84	86	78	53
Value (£ million)	494	494	462	476	389	327	280	265	263	253	246	229	166

Source: IHS, BVA

As Figure 11.6 shows, the most popular genres of rented films were action and comedy, which accounted for 20% and 19% respectively, of all rentals, followed by drama, thriller and children's titles. (It should be noted that as with the Official Charts Company/BVA categories used in Figure 11.4, the Kantar Worldpanel definitions differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in Chapter 4.)

Figure 11.6 Film on video rental share by genre, 2013

Genre	%
Action	20.2
Comedy	19.1
Drama	16.9
Thriller	12.4
Children's	11.2
Horror	9.0
Sci-fi	6.7
Other	4.5



Source: BVA, Kantar Worldpanel

Note: These genres are assigned by Kantar Worldpanel and the categories are not the same as those from Chapter 4.

The list of top 10 online rentals in 2013 is topped by sci-fi thriller, *Looper*. American films dominate the chart, and the only UK film which appears is the UK studio-backed film, *Total Recall*. The only non-USA film is the French film, *Taken 2*, which is also one of two films in this list which also appear in the top 10 selling films on video in 2013. The other film which appears in both lists is *Django Unchained*.

Table 11.6 Top 10 online film on video rentals*, 2013

	Title	Country of origin	Distributor
1	Looper	USA/China	eOne Films
2	Ted	USA	Universal
3	Jack Reacher	USA	Paramount
4	Taken 2	Fra	20th Century Fox
5	Total Recall	UK/USA/Can	Sony Pictures/Elevation Sales
6	Django Unchained	USA	Sony Pictures
7	Flight	USA	Paramount
8	Lawless	USA	eOne Films
9	Silver Linings Playbook	USA	Entertainment in Video
10	Olympus Has Fallen	USA	Lionsgate/Elevation Sales

Source: BVA, Kantar Worldpanel

* 'Online rental' refers to online ordering with postal delivery. See Glossary.

The list of top 10 over-the-counter rentals in 2013 includes five films (*Looper, Taken 2, Silver Linings Playbook, Total Recall* and *Olympus Has Fallen*) which were also in the top 10 online rentals. Three films from this chart, *Skyfall, The Hobbit: An Unexpected Journey* and *Taken 2*, also appear in the overall list of top 10 selling films on video in 2013.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 11.7 Top 10 over-the-counter film on video rentals, 2013

	Title	Country of origin	Distributor
1	Skyfall	UK/USA	20th Century Fox
2	Looper	USA/China	eOne Films
3	The Hobbit: An Unexpected Journey	USA/NZ	Warner Bros
4	Taken 2	Fra	20th Century Fox
5	Jack Reacher	USA	Paramount
6	Oblivion	USA	Universal
7	Silver Linings Playbook	USA	Entertainment in Video
8	Total Recall	UK/USA/Can	Sony Pictures/Elevation Sales
9	Argo	USA	Warner Bros
10	Olympus Has Fallen	USA	Lionsgate/Elevation Sales

Source: BVA, Kantar Worldpanel

11.3 Hardware

According to the BVA, in 2013 some 3.3 million DVD players were sold in the UK. Sales of DVD players have been decreasing each year since 2008 but over 60 million units have been sold in the UK in the last 10 years and, according to the BVA, over 90% of the population has access to a device that can play DVDs within the household. Also, 1.2 million Blu-ray players were sold in 2013, one third of which were 3D players. Sales of Blu-ray players in 2013 were slightly lower than in 2012 (1.3 million units in 2012) but more than 5.5 million Blu-ray players have now been sold in the UK, and 21.2% of households own at least one player (compared with 17.6% in 2012).

- For more on the top films at the UK box office see Chapter 2 (page 21)
- For more on the video on demand (VoD) market see Chapter 12 (page 131)
- For more on the UK film market as a whole see Chapter 14 (page 151)

Image: *The Hunger Games: Catching Fire* courtesy of Lionsgate Films

Chapter 12

Video on Demand

Video on Demand (VoD) enables audiences to access films through a range of devices, anytime, anywhere. Revenues for online services were higher than television-based earnings for the second consecutive year in 2013, but our overall understanding of this market is hampered by a lack of robust data.

FACTS IN FOCUS:

The total VoD film market was estimated to be worth £323 million in 2013, up 37% on 2012, and up over 400% since 2002.

Online VoD revenue was greater than television-based income: £193 million compared with £130 million.

Subscription services accounted for the majority of online film revenues, overtaking digital retail for the first time.

Apple was the highest earning VoD provider in the UK, but YouTube is the most used provider to access feature film on VoD, with over 39% of online film viewers, followed by LOVEFiLM, with 25% of viewers and Netflix with 24%.

16% of online viewers access films on demand, less than catch up television services (40% of viewers) and short video clips (53%).

12.1 Availability of comprehensive data on film on VoD

At the present time, reliable data on film on VoD are limited to revenue and business aggregates so it is not yet possible to show the highest grossing or most popular film or UK film on this platform. We currently rely on surveys to gain an insight into the details of the VoD market which tend to focus on methods of accessing VoD, VoD preferences and estimated overall VoD transactions. It is difficult to get a clear picture of film on VoD from these data, especially as the consumption of feature films is not clearly distinguished from that of television programmes.

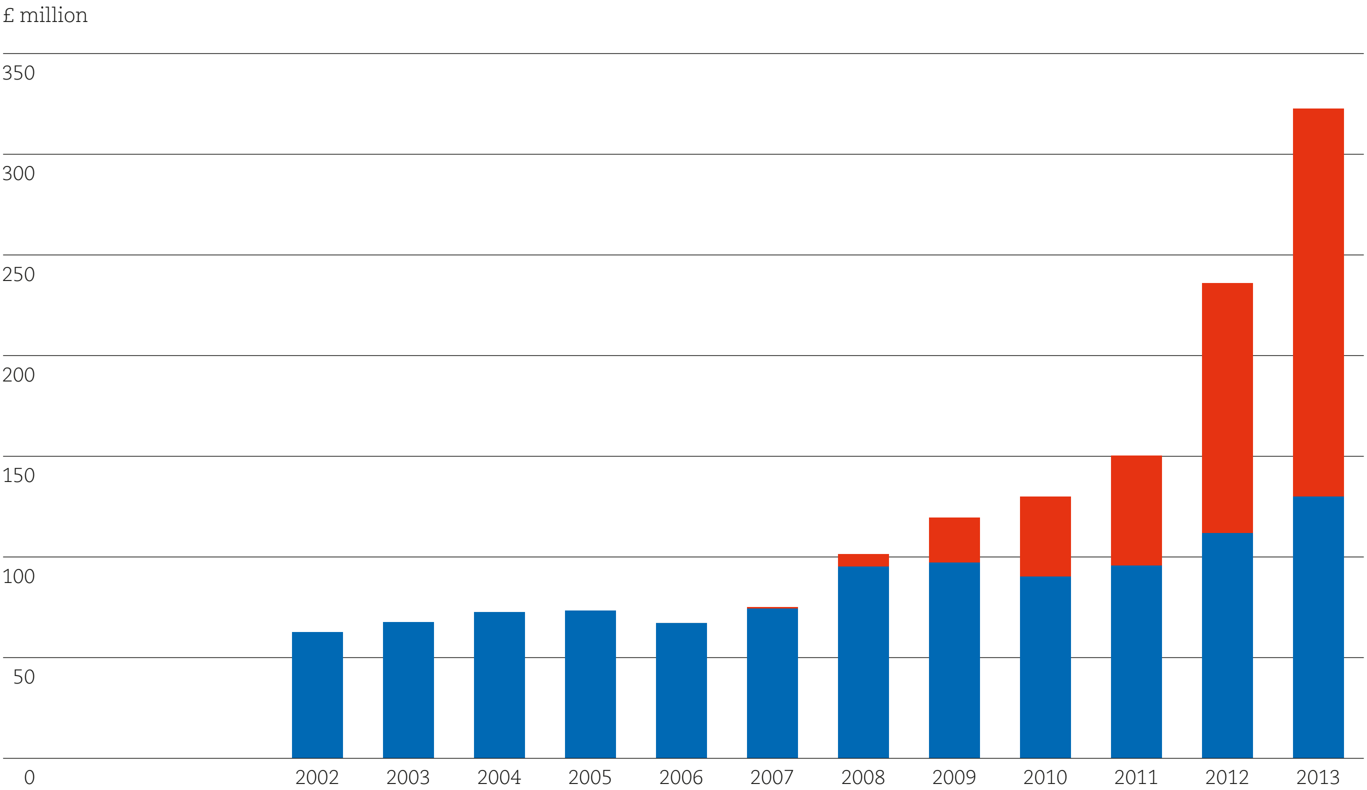
12.2 Film in the VoD market

According to IHS, the estimated value of the UK VoD film market in 2013 was £323 million, an increase of 37% compared with 2012. The rate of growth is less than that seen in 2012, where overall revenues rose by 57% compared with 2011. In both years, the increase has primarily been due to a growth in online revenues. Since 2002 the value of VoD film revenues has increased by 416% (see Figure 12.1).

The television-based market (including BT, Sky, TalkTalk, and Virgin Media services) in 2013 was worth an estimated £130 million, up 16% from £112 million in 2012. Online VoD revenues increased by 56% from £124 million in 2012 to £193 million 2013. This is the second consecutive year that online VoD revenues have been greater than those from television-based services.

The combined value of film on VoD represented approximately 8% of the total UK filmed entertainment market, compared with 6% in 2012.

Figure 12.1 Estimated value of the film on VoD market in the UK, 2002-2013



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Television-based VoD	62.6	67.6	72.7	73.5	67.2	74.4	95.2	97.3	90.3	95.8	111.9	129.9
Online VoD	–	–	–	–	0.2	0.6	6.2	22.3	39.5	54.6	124.0	192.9
Total value of VoD market (£ million)	**62.6**	**67.6**	**72.7**	**73.5**	**67.4**	**75.0**	**101.4**	**119.6**	**129.8**	**150.4**	**235.9**	**322.8**

Source: IHS

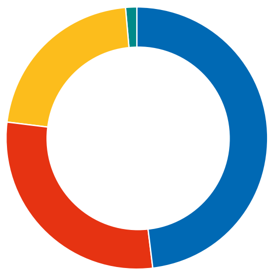
Online VoD services in the UK employ four basic types of business model; the first two are transactional VoD (TVoD) models:

- Rental VoD – one-off rental, also known as download-to-rent (DTR) eg from Google Play or Blinkbox;
- Retail or download-to-own (DTO), also known as electronic-sell-through (EST) eg iTunes or Xbox Video;
- Subscription VoD (SVoD) – unlimited access to content for a fixed monthly sum eg Amazon Prime Instant Video or Netflix;
- Free/advert-supported VoD from catch up services eg BBC iPlayer or 4oD.

IHS estimates that subscription services accounted for 48% of online film revenues in the UK in 2013, followed by digital retail at 29% and digital rental at 22% (Figure 12.2). Subscription services overtook digital retail for the first time; the subscription model has seen significant growth in the past two years, up from 31.5% in 2012 and 0.6% in 2011.

Figure 12.2 Online VoD film revenue by type of service, 2013

	£ million	%
Subscription	92.8	48.1
Digital retail	55.5	28.8
Digital rental	41.9	21.7
Advertising	2.6	1.3



Source: IHS

12.3 Top providers of VoD

In the absence of film by film data, this section outlines the top providers of VoD and top providers used by online viewers. Table 12.1 shows a list of the top VoD providers in the UK. Apple, BSkyB and Netflix are the highest earning providers. However, the ranking is based on revenue for both television and film on VoD (the figures are confidential) so it is possible that the rankings would be different if they were based on revenue from film on VoD only.

Netflix was the fastest growing provider of VoD services in the market in 2013, almost doubling its international (non-USA) revenues from $476 million in 2012 to $775 million. According to IHS, this is due to Netflix expanding into the Nordic countries and the Netherlands, alongside the UK in 2012.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 12.1 Top transactional and subscription television and film VoD providers in the UK, 2013 (ranked by revenue)[1]

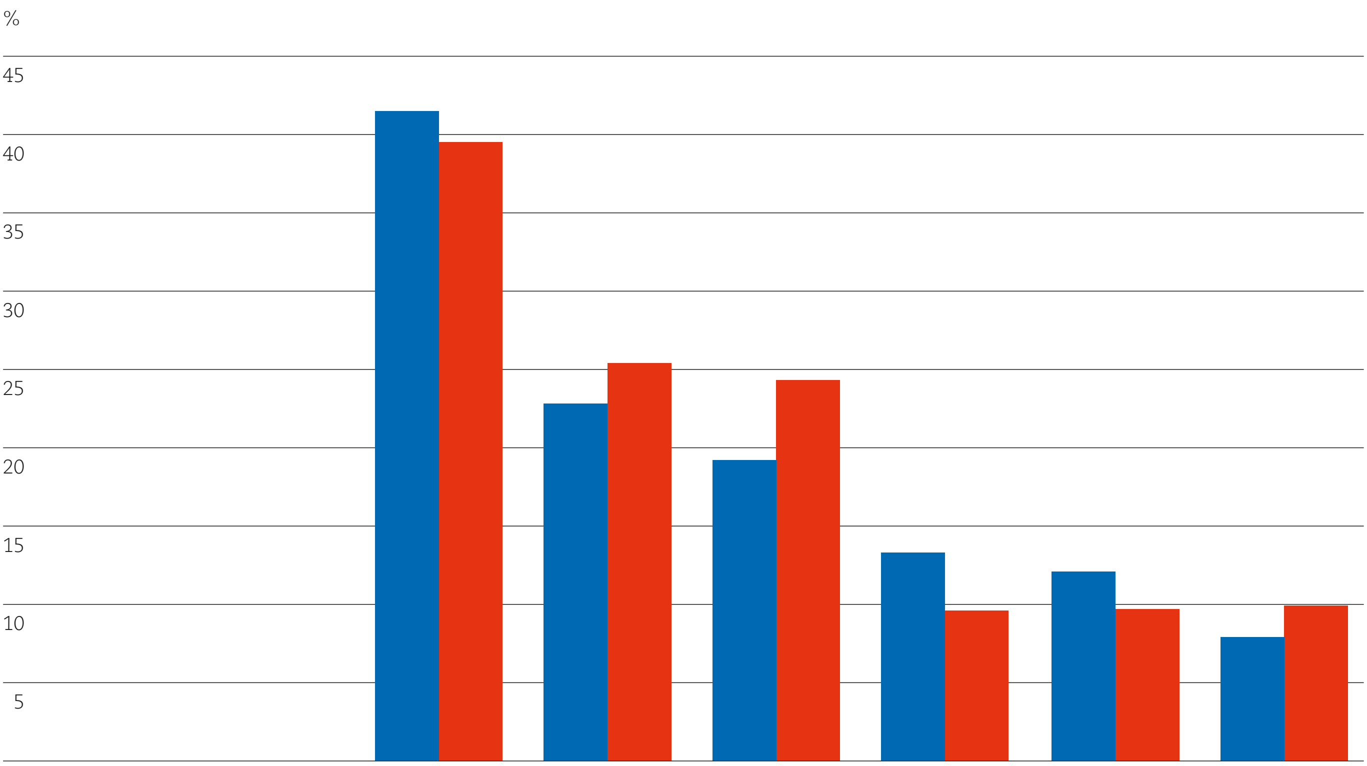
Rank	Company	Country of Ownership
1	Apple	USA
2	BSkyB	UK/USA
3	Netflix	USA
4	Virgin Media	UK/USA
5	LOVEFiLM	USA
6	Microsoft	USA
7	BT Vision	UK
8	Now TV	UK/USA

Source: IHS

[1] Revenue figures are not disclosed as these are confidential.

According to Ofcom, YouTube was the most popular VoD provider among UK online film viewers aged 12 or over who downloaded, streamed and shared films in 2012 and 2013, with 42% and 39% of users respectively (Figure 12.3). For both years the next most popular providers were LOVEFiLM (23% in 2012; 25% in 2013), followed by Netflix (19% in 2012; 24% in 2013). Although Apple was the top provider in revenue terms, iTunes was only the fourth most used provider in 2012 and the fifth in 2013.

Figure 12.3 VoD providers used in the UK for downloading and streaming by online film viewers aged 12+



	YouTube	LOVEFiLM*	Netflix	iTunes	Amazon	Sky Go
2012	41.5	22.8	19.2	13.3	12.1	7.9
2013	39.5	25.4	24.3	9.6	9.7	9.9

Source: *Ofcom Online Copyright Infringement Tracker Waves 1 and 4*, Kantar Media

* The LOVEFiLM brand is now used only for video rental, LOVEFiLM Instant is now part of Amazon Prime Instant Video.

Comparing Table 12.1 and Figure 12.3 implies that the available data do not always provide a consistent picture of online film consumption. Looking at leading providers, there are differences between industry estimates of revenue and user surveys of the services accessed. YouTube is the most used provider, but as it provides film and video for free it does not appear in the list of top providers by revenue. Amazon also does not appear in this list, but is one of the most used providers. The differences may be due to the business model that is employed by the provider, pricing and willingness to pay for downloading or streaming films, and self-perception of downloading or streaming.

12.4 Audience for on-demand film

People can now watch film on demand wherever they are, as long as there is a 3G/4G hotspot or wireless router to connect their (mobile) devices to the web. By the beginning of 2014, 84% of adults in the UK had access to the internet at home, and 53% of adults used a mobile phone to connect to the web. In addition, 35% of households had a tablet or similar device, of which around half were 3G/4G enabled for mobile internet access.

It is possible to gauge the potential audience for film on VoD content. In terms of television-based VoD providers, by the end of March 2014 approximately, 10.5 million Sky satellite subscribers, 3.8 million Virgin Media TV subscribers, 917,000 TalkTalk TV subscribers and 900,000 BT TV subscribers were able to access a range of on-demand services, including pay-per-view and catch up services. The potential audience for television-based VoD in the UK was estimated to be over 16 million.

Research commissioned by Ofcom has provided new information on the online consumption habits of the UK population, which in the absence of data on top performing film titles, can provide an impression of viewers buying habits. The current analysis compares data for the first and fourth waves of its Online Copyright Infringement Tracker study, which covered the three-month periods April-June 2012 and March-May 2013. This gives a proxy for a yearly comparison between 2012 and 2013. In the first period, April-June 2012, 19% of internet users aged 12 or over had downloaded or streamed film content, while in March-May 2013, 18% of internet users had done so (Table 12.2). According to Ofcom, 27% of internet users aged 12 or over had downloaded or streamed film content at some time between 2012 and 2013.

The median number of films downloaded or streamed online in March-May 2013 was five, up from two in April-June 2012.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 12.2 Accessing online film content among internet users aged 12+

Method	April-June 2012 % of viewers	April-June 2012 Median volume	March-May 2013 % of viewers	March-May 2013 Median volume
Download	9	3	8	3
Stream or access	16	3	16	4
Share	2	4	2	2
Download or stream/access ie consumed	19	2	18	5
Download, stream/access, or share	19	–	19	–

Source: *Ofcom Online Copyright Infringement Tracker Waves 1 and 4,* Kantar Media

With regards to payment for digital film content, the Ofcom study categorises people according to the proportion of content they claim to have paid for. In March-May 2013, 28% of film viewers paid for all content while 58% accessed all content for free (Table 12.3). Of all internet users aged 12 or over in this three-month period, 5% paid for all film content while 11% obtained film for free. In April-June 2012, 32% of online film viewers paid for all film content, while 50% paid for none.

Ofcom estimates that online film consumption in March-May 2013 totalled 94 million films, of which 39 million were paid for and 55 million were downloaded or streamed for free.

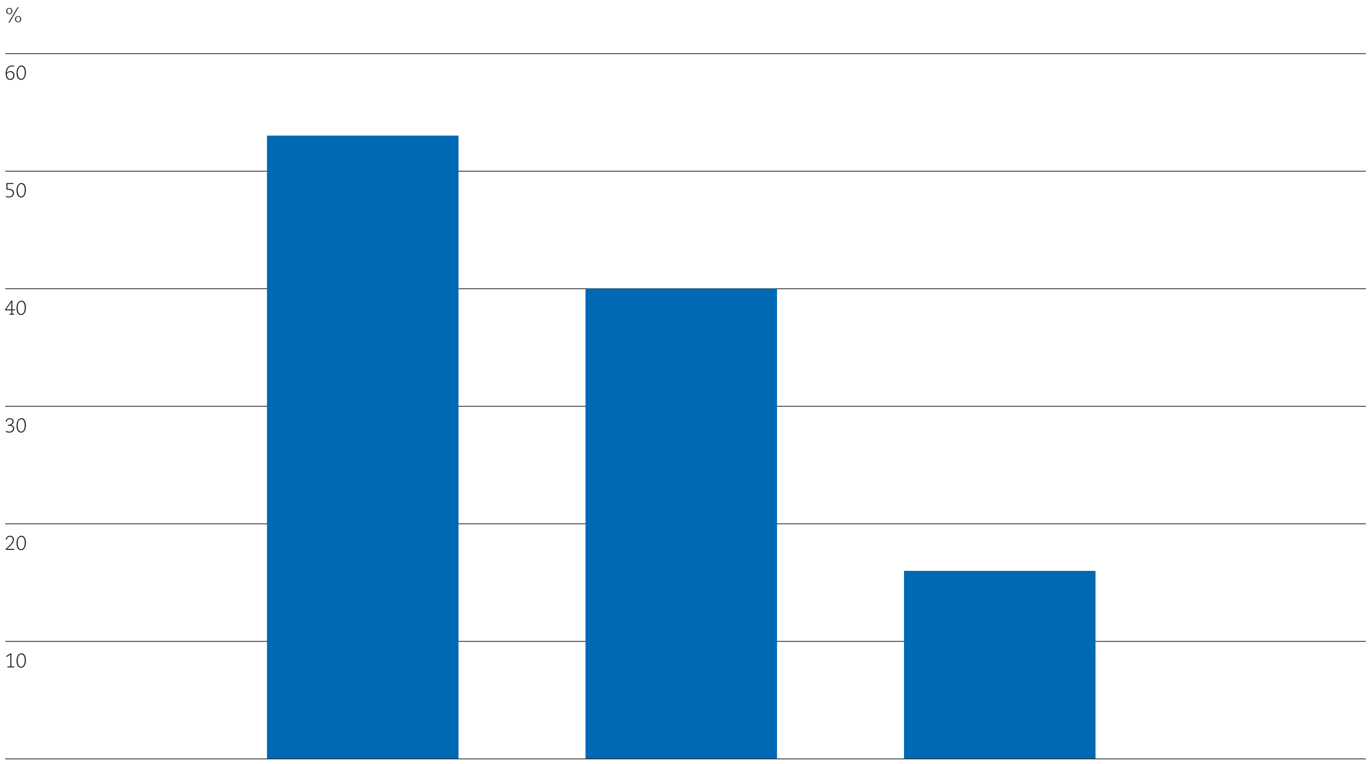
Table 12.3 Proportion who paid to consume film content or did so for free

Payment group	April-June 2012 % of all who consumed film	April-June 2012 % of 12+ internet users	March-May 2013 % of all who consumed film	March-May 2013 % of 12+ internet users
100% paid	32	6	28	5
Mix of paid and free	17	3	14	3
100% free	50	9	58	11
Any paid	49	9	72	14
Any free	68	9	42	8

Source: *Ofcom Online Copyright Infringement Tracker Waves 1 and 4,* Kantar Media

Film was not the most watched online VoD format in 2012 (the latest year the data is available), according to Ofcom. Short video clips (eg film trailers and clips made for the internet) were the most popular, followed by television programmes on catch up services, with 53% and 40% of internet users respectively (Figure 12.4). Film and TV services (such as LOVEFiLM and Netflix) was third with 16%. This is partly to do with the rise of people being able to connect more easily to the internet on the move, the increasing number of households that have televisions that connect to the internet and the greater convenience of downloading (and sharing) short video clips and television programmes compared with feature length films.

Figure 12.4 Claimed consumption of audiovisual content by online viewers aged 15+



Video clips either streamed or downloaded	Catch up TV services either streamed or downloaded	TV and film services eg Netflix/LOVEFiLM
53	40	16

Source: *Ofcom Market Communications Report 2013*

- For more information on film on physical video see Chapter 11 (page 121)
- For more on film on television see Chapter 14 (page 151)
- For an overview of the film market as a whole see Chapter 14 (page 151)
- For more on film audiences see Chapter 15 (page 157)

- For Ofcom research and statistics, see http://stakeholders.ofcom.org.uk/market-data-research/

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 13

Film on UK television

In terms of viewer numbers, the single most important platform for film consumption is television. Viewers had a choice of almost 7,000 unique film titles across all channels in 2013, and the cumulative film audience was just under 3.4 billion.

FACTS IN FOCUS:

There were 6,941 unique film titles on television in 2013, including 1,800 on terrestrial channels, 1,324 on pay TV film channels and 3,817 on other digital channels.

There were 1,990 film transmissions on terrestrial channels, down from 2,141 in 2012. Of these, 514 (26%) were UK films (up from 443 in 2012), 269 films (13%) were channel premieres and 47 (2%) were foreign language films (down from 71 in 2012).

There were over 57,000 film transmissions on multi-channel television, of which over 41,000 were on pay TV film channels.

The top film on terrestrial television was *Up* on BBC One, with 7.9 million viewers.

There were just under 3.4 billion viewings of feature film across all television formats (except pay-per-view) in 2013 – over 20 times the number of cinema admissions.

13.1 Programming on the terrestrial channels

Table 13.1 shows the total number of feature films broadcast on the five terrestrial channels in 2013 and the number of UK titles broadcast in that time. UK films are broken down into older titles (more than eight years old) and recent theatrical releases (released in the last eight years). 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 1,990 films broadcast on terrestrial television in 2013, down from 2,141 in 2012, an average of over five films a day.

Table 13.1 Feature films broadcast on terrestrial television, 2013

Channel	Number of films broadcast	Number of UK films broadcast	UK films as % of total	Number of recent UK films broadcast[1]	Recent UK films as % of total films broadcast[1]
BBC One	272	61	22	37	14
BBC Two	458	158	35	58	13
ITV	244	81	33	35	14
Channel 4	584	148	25	53	9
Channel 5	432	66	15	12	3
Total	**1,990**	**514**	**26**	**195**	**10**

Source: Attentional, BFI RSU analysis

[1] A recent film is one which has been theatrically released, or intended for theatrical release, in the UK since 2005.

In 2013, 11% of films broadcast on terrestrial television (213 films) were premieres (films shown for the first time on terrestrial television); 57 of these were UK films (Table 13.2). Channel 4 showed the highest number of premieres overall and the highest number of UK film premieres, with 126 and 30 films respectively, whereas ITV showed the smallest number of premieres with five, only one of which was a premiere of a UK film.

Table 13.2 Premiere feature films broadcast on terrestrial television, 2013

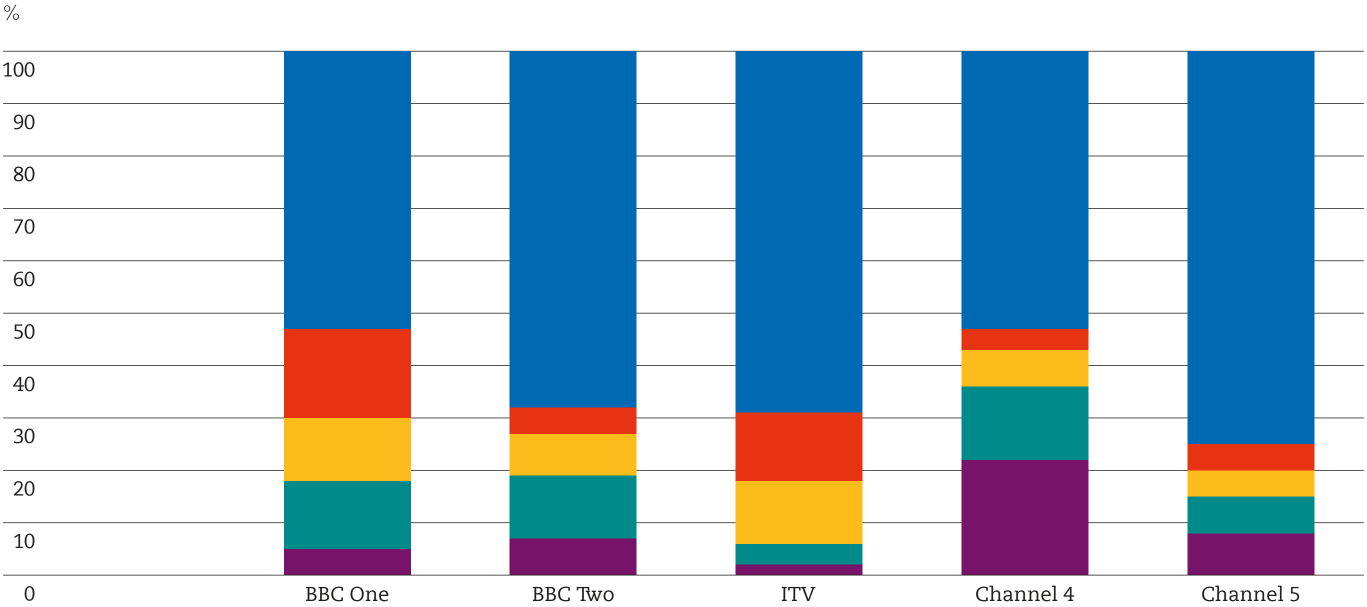
Channel	Number of premiere films broadcast	Number of UK premiere films broadcast	UK premiere films as % of total premiere films	Average audience (million)	Top premiere	Audience for top premiere (million)
BBC One	14	5	36	1.9	Up	7.9
BBC Two	34	19	56	0.6	Made in Dagenham	2.4
ITV	5	1	20	2.6	Nanny McPhee and the Big Bang	5.0
Channel 4	126	30	24	0.8	Red	3.9
Channel 5	34	2	6	1.0	Angels & Demons	2.3
Total	**213**	**57**	**27**	**0.9**		

Source: Attentional, BARB, BFI RSU analysis

Figure 13.1 shows the percentage of films shown categorised by the number of times they have been screened by a particular channel. The number of times a film is shown varies across the channels, although for each channel films shown five times or more account for the greatest proportion (64%) of film broadcasts. As with the number of premieres broadcast in 2013, Channel 4 had the largest proportion of premieres (22%) in terms of films broadcast, while ITV had the smallest (2%).

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 13.1 Feature film premieres and repeat broadcasts on terrestrial channels, 2013



	BBC One	BBC Two	ITV	Channel 4	Channel 5
Premiere	5	7	2	22	8
2nd broadcast	13	12	4	14	7
3rd broadcast	12	8	12	7	5
4th broadcast	17	5	13	4	5
5th or more broadcast	53	68	70	53	76

Source: Attentional, BARB, BFI RSU analysis

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

The most popular film to premiere on terrestrial television in 2013 was BBC One's *Up*, with 7.9 million viewers (Table 13.3). This was followed by *Pirates of the Caribbean: On Stranger Tides* (BBC One) with 5.9 million viewers and *Nanny McPhee and the Big Bang* (ITV) with 5 million viewers. The top 10 is dominated by films from the USA, most of which are family films and studio-backed UK titles.

Table 13.3 Top 10 film premieres on terrestrial television, 2013

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Up	BBC One	USA	2009	7.9
2	Pirates of the Caribbean: On Stranger Tides	BBC One	UK/USA	2011	5.9
3	Nanny McPhee and the Big Bang	ITV	UK/USA	2010	5.0
4	Despicable Me	ITV	USA	2010	4.7
5	Red	Channel 4	USA	2010	3.9
6	The Princess and the Frog	BBC One	USA	2010	3.5
7	Unknown	Channel 4	USA/Ger/Fra/Can/Jap	2011	3.4
8	Paul	Channel 4	UK/USA	2011	3.4
9	Robin Hood	Channel 4	UK/USA	2010	3.4
10	The Karate Kid	Channel 4	USA/China	2010	3.0

Source: Attentional, BARB, BFI RSU analysis

As Table 13.4 shows, 47 foreign language films were screened on the main terrestrial channels in 2013 (2% of all films shown) down from 71 in 2012. Only two terrestrial channels broadcast foreign language titles: BBC Two showed eight films and Channel 4 showed 39 films.

Table 13.4 Foreign language films broadcast on terrestrial television, 2013

Channel	Number of foreign language films broadcast	% of channel's film output	Average audience (million)	Top foreign language film	Total audience for top rated foreign language film[1] (million)
BBC One	–	–	–	–	–
BBC Two	8	2.0	0.20	The Baader Meinhof Complex	0.19
ITV	–	–	–	–	–
Channel 4	39	6.7	0.07	[Rec][2]	0.22
Channel 5	–	–	–	–	–
Total	**47**	**2.36**	**0.08**		

Source: Attentional, BARB, BFI RSU analysis

[1] Total audience for all transmissions for the foreign language film, on the terrestrial channel listed.

Audience figures for foreign language films on terrestrial television were a lot lower in 2013 than in 2012. As Table 13.5 shows, with nearly 220,000 viewers, the top foreign language film shown on terrestrial television was *[Rec]²*, followed by *Pan's Labyrinth* with just over 200,000 viewers. (The top two films in 2012, *The Girl with the Dragon Tattoo* and *The Girl Who Played with Fire,* had 1.2 million and 700,000 viewers respectively.) European films were the most popular with eight titles in the top 10.

Table 13.5 Top 10 foreign language films[1] on terrestrial television, 2013

	Title	Channel	Country of origin	Year of theatrical release	Audience
1	[Rec][2]	Channel 4	Spain	2010	219,700
2	Pan's Labyrinth	Channel 4	USA/Spa/Mex	2006	200,700
3	The Baader Meinhof Complex	BBC Two	Germany	2008	189,600
4	I've Loved You So Long	BBC Two	France	2008	171,800
5	Funny Games	Channel 4	Austria	1998	154,700
6	Hero	Channel 4	China/Hong Kong	2004	150,100
7	The Diving Bell and the Butterfly	BBC Two	USA/Fra	2008	148,100
8	The Last Mitterand	Channel 4	France	2005	120,000
9	Charulata	Channel 4	India	1964	113,600
10	2 Days in Paris	BBC Two	Fra/Ger	2007	105,400

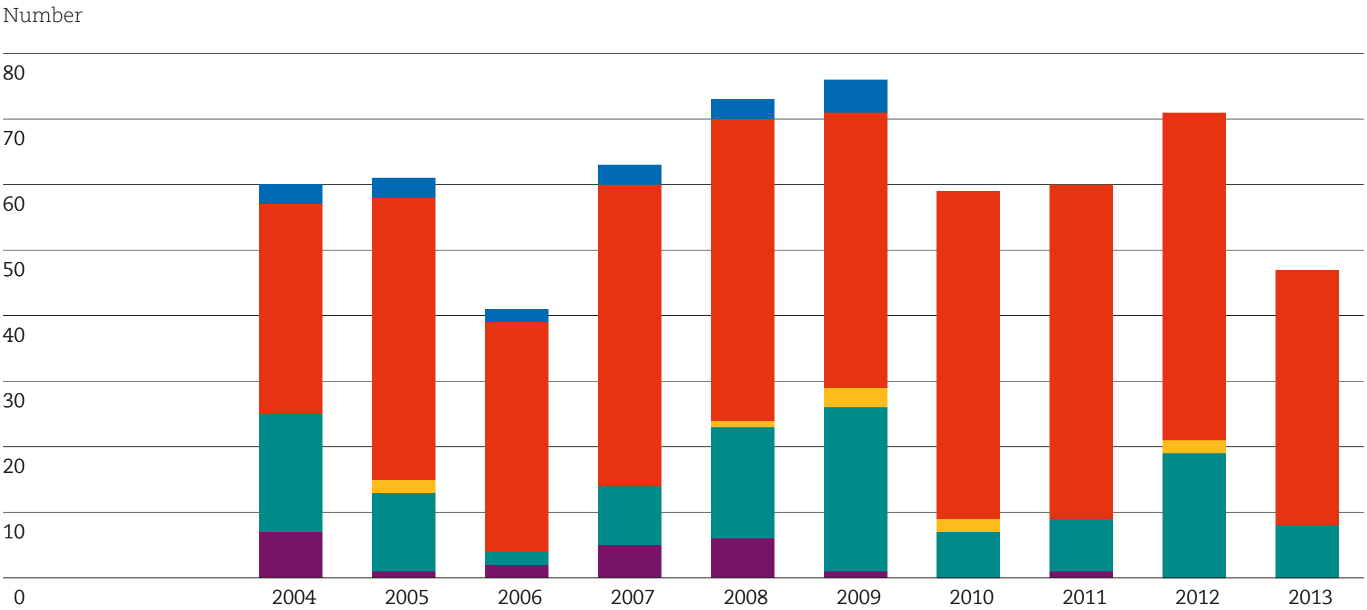
Source: Attentional, BFI RSU analysis

[1] Foreign language films with the highest audience figure for an individual transmission.

Figure 13.2 illustrates the number of foreign language films broadcast on terrestrial television between 2004 and 2013. The number of titles has remained consistently low in comparison to the number of English language titles broadcast; after 2006 (41 films), 2013 had the second lowest number of films (47) since our records began. Channel 4 has shown the most foreign language films throughout this period.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 13.2 Number of foreign language films broadcast on terrestrial television, 2004-2013



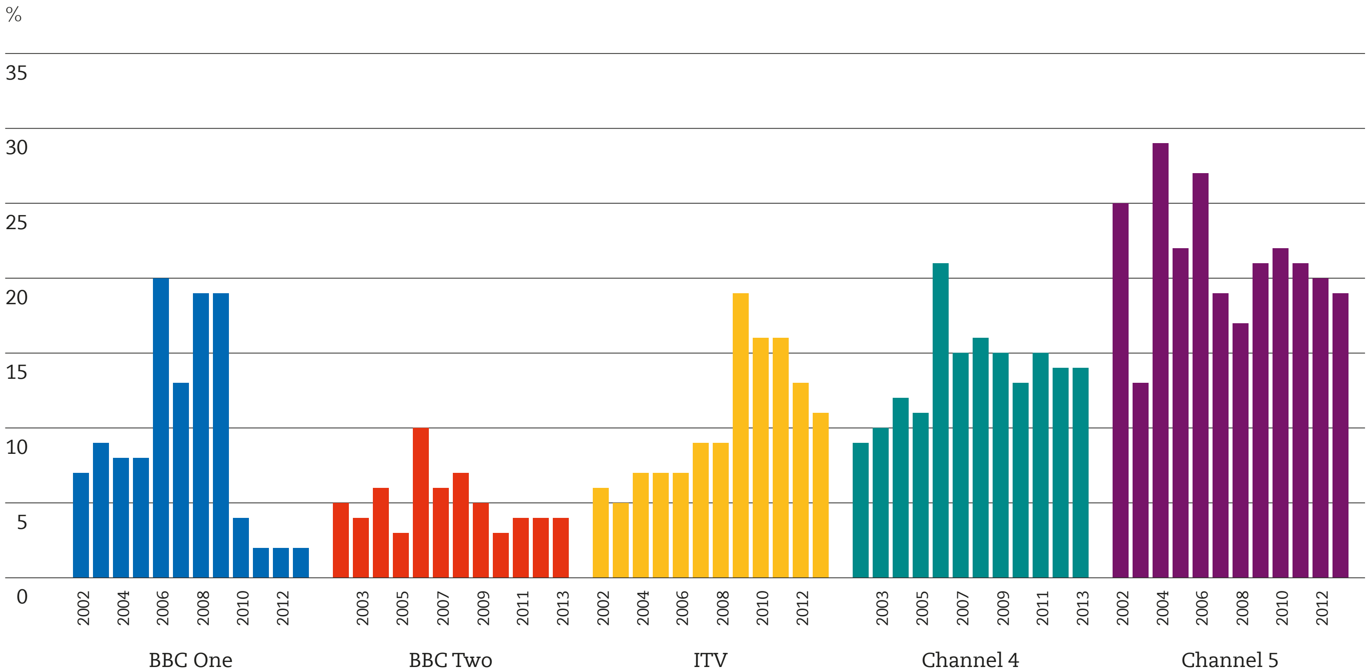
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
BBC One	7	1	2	5	6	1	–	1	–	–
BBC Two	18	12	2	9	17	25	7	8	19	8
ITV	–	2	–	–	1	3	2	–	2	–
Channel 4	32	43	35	46	46	42	50	51	50	39
Channel 5	3	3	2	3	3	5	–	–	–	–
Total	**60**	**61**	**41**	**63**	**73**	**76**	**59**	**60**	**71**	**47**

Source: Attentional, BFI RSU analysis

13.2 Films on peak time terrestrial television, 2002-2013

The proportion of peak time hours (18:00 to 23:00 hours) dedicated to feature films varied widely across the terrestrial channels between 2002 and 2013 (Figure 13.3). Throughout the period, Channel 5 has had the highest proportion of peak time hours dedicated to films (19% in 2013), while Channel 4 has always had either the second or third highest proportion. In 2013, film made up 14% of peak time programming for Channel 4 and 11% for ITV. As in 2012, BBC One had the lowest proportion of peak time hours dedicated to feature films, at 2%.

Figure 13.3 Film as a percentage of peak time programming hours by channel, 2002-2013



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
BBC One	7	9	8	8	20	13	19	19	4	2	2	2
BBC Two	5	4	6	3	10	6	7	5	3	4	4	4
ITV	6	5	7	7	7	9	9	19	16	16	13	11
Channel 4	9	10	12	11	21	15	16	15	13	15	14	14
Channel 5	25	13	29	22	27	19	17	21	22	21	20	19

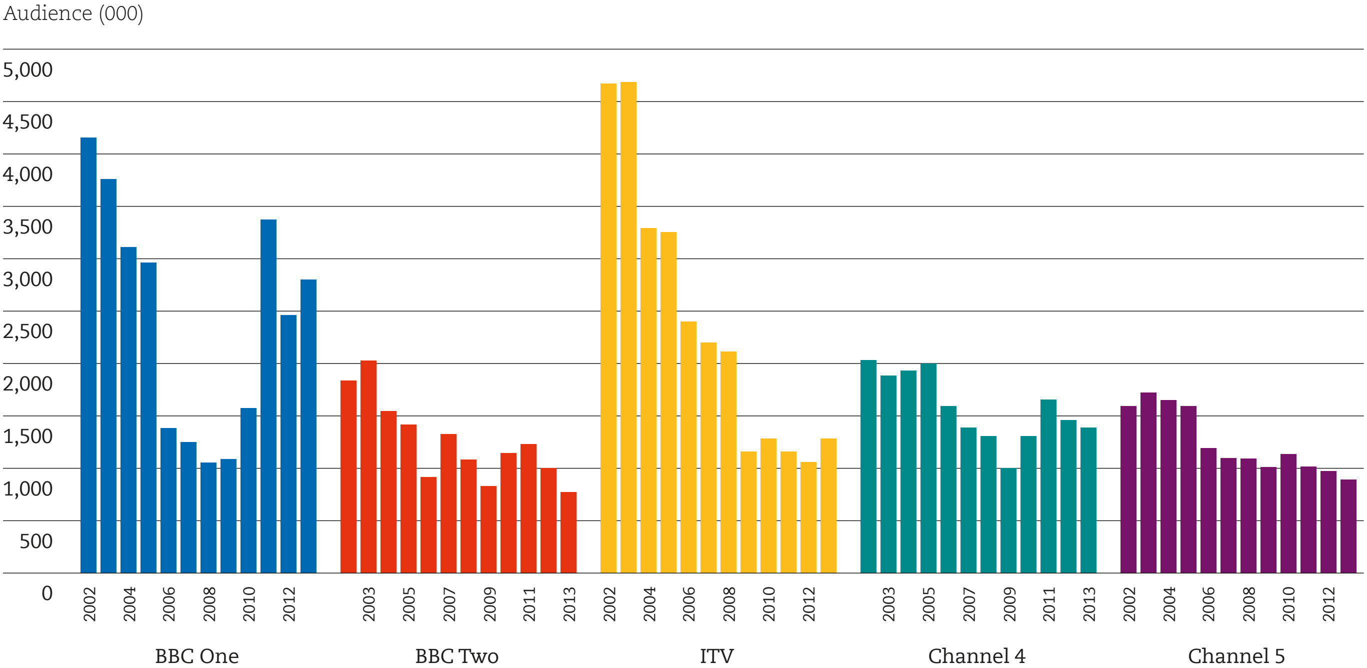
Source: Attentional

13.3 Audiences for film on peak time terrestrial television

In 2013, the average audience for peak time films on BBC One and ITV increased, while average audiences decreased on BBC Two, Channel 4 and Channel 5 (Figure 13.4). BBC One had the largest increase with an average audience of 2.8 million up from 2.5 million in 2012; ITV's average audience grew from just over 1 million to 1.3 million. Average audiences on BBC Two fell from 1 million to 800,000, on Channel 4 from 1.5 million to 1.4 million and on Channel 5 from just under 1 million to just under 900,000.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 13.4 Average audience for peak time film, 2002-2013



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
BBC One	4,156	3,760	3,112	2,964	1,383	1,250	1,056	1,088	1,574	3,371	2,463	2,799
BBC Two	1,836	2,028	1,547	1,417	917	1,324	1,081	830	1,146	1,232	1,000	773
ITV	4,671	4,684	3,290	3,253	2,400	2,201	2,112	1,161	1,283	1,157	1,057	1,281
Channel 4	2,031	1,886	1,931	1,997	1,595	1,388	1,306	1,001	1,306	1,655	1,460	1,390
Channel 5	1,594	1,722	1,650	1,593	1,190	1,099	1,094	1,009	1,135	1,017	973	891

Source: Attentional, BARB

13.4 Top films on terrestrial television

The most popular film on terrestrial television in 2013 was *Up*, with almost 7.9 million viewers tuning in to watch it on New Year's Day on BBC One (Table 13.6). In theatrical revenue terms, this is equivalent to a box office gross of £51.7 million (its actual gross in the UK was £34.6 million). As previously mentioned, this was also the most watched film premiere on terrestrial television. The top 10 in 2013 is dominated by films that appeal to families, including *Pirates of the Caribbean: On Stranger Tides*, four Harry Potter films, *Nanny McPhee and the Big Bang* and *Finding Nemo*.

Table 13.6 Top 10 films[1] on terrestrial television, 2013

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Up	BBC One	USA	2009	7.9
2	Pirates of the Caribbean: On Stranger Tides	BBC One	UK/USA	2011	5.9
3	Harry Potter and the Half-Blood Prince	ITV	UK/USA	2009	5.6
4	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	5.3
5	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	5.2
6	Harry Potter and the Half-Blood Prince	ITV	UK/USA	2009	5.2
7	Nanny McPhee and the Big Bang	ITV	UK/USA	2010	5.0
8	Indiana Jones and the Kingdom of the Crystal Skull	BBC One	USA	2008	5.0
9	Finding Nemo	BBC One	USA	2003	5.0
10	Quantum of Solace	ITV	UK/USA	2008	4.7

Source: Attentional, BARB

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

The list of the top 10 UK films of 2013 (Table 13.7) is dominated by the Harry Potter films with seven of the top 10 being from the series. The remaining films are *Pirates of the Caribbean: On Stranger Tides* (number one in the top 10 UK films), *Nanny McPhee and the Big Bang* and *Quantum of Solace*, all of which appear in the overall top 10 films on terrestrial television. All but one of the films in the table was shown on ITV. Three of the Harry Potter titles appear twice on the list – *Harry Potter and the Half-Blood Prince, Harry Potter and the Order of the Phoenix* and *Harry Potter and the Goblet of Fire* – as two separate transmissions for each of these films rated in the top 10.

Table 13.7 Top 10 UK originated films[1] on terrestrial television, 2013

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Pirates of the Caribbean: On Stranger Tides	BBC One	UK/USA	2011	5.9
2	Harry Potter and the Half-Blood Prince	ITV	UK/USA	2009	5.6
3	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	5.3
4	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	5.2
5	Harry Potter and the Half-Blood Prince	ITV	UK/USA	2009	5.2
6	Nanny McPhee and the Big Bang	ITV	UK/USA	2010	5.0
7	Quantum of Solace	ITV	UK/USA	2008	4.7
8	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	4.5
9	Harry Potter and the Chamber of Secrets	ITV	UK/USA/Ger	2002	3.9
10	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	3.7

Source: Attentional, BARB

[1] UK originated films with the highest audience figure for an individual transmission.

The most popular UK independent film on terrestrial television in 2013 was *The King's Speech* with 2.9 million viewers, followed by *The Iron Lady* (2.7 million) and *The Inbetweeners Movie* (2.6 million) all of which were top performing films when released theatrically (Table 13.8). As in 2012, most of the films in the top 10 were shown on either BBC Two or Channel 4. *The Inbetweeners Movie*, the top independent UK film on television in 2012, was still popular with British viewers a year later as it appears twice in the 2013 top 10 (at numbers three and four) for broadcasts in May and at Christmas.

Table 13.8 Top 10 independent UK films[1] on terrestrial television, 2013

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	The King's Speech	Channel 4	UK	2011	2.9
2	The Iron Lady	Channel 4	UK	2012	2.7
3	The Inbetweeners Movie	Channel 4	UK	2011	2.6
4	The Inbetweeners Movie	Channel 4	UK	2011	2.5
5	Made in Dagenham	BBC Two	UK	2010	2.4
6	Santa Claus: The Movie	ITV	UK/USA #	1985	2.2
7	Jane Eyre	BBC Two	UK	2011	2.0
8	The Eagle	Channel 4	UK/USA #	2011	1.9
9	Kick-Ass	Channel 5	UK/USA #	2010	1.8
10	The Young Victoria	BBC Two	UK	2009	1.7

Source: Attentional, BARB

Notes:
[1] UK independent films with the highest audience figure for an individual transmission.
Santa Claus: The Movie, The Eagle and Kick-Ass were made with independent (non-studio) US support.

13.5 Films on multi-channel television

In 2013, multi-channel television (freeview/satellite/cable) accounted for almost 47% of all television viewing in the UK and 62% of all viewings of film on television. Table 13.9 lists the number of film transmissions, the average audience, the top film and audience for the top film, for a selection of digital channels which broadcast feature films. After dedicated film channels, Turner Classics (over 4,200 films) and Film4 (over 2,800 films), the highest number of films was screened by the Indian-based Star digital channels, with over 1,700 films.

For many of the channels, including Film4, ITV 2-4, Gold and 5*, the number of transmissions decreased, compared with 2012, partly due to +1 channels not being included in the data for 2013. *Red* recorded the largest audience for a single screening on multi-channel television, with over 2.1 million viewers on Film4.

Table 13.9 Feature films on selected digital channels, 2013

Channel	Number of film transmissions	Average audience (000)	Top film[1]	Audience for top film (000)
Turner Classics Movies 1-2	4,226	18	The Rundown	127
Film4	2,810	210	Red	2,107
Star Gold, Star Plus and Life OK	1,715	6	Singham	81
ITV 2-4	1,520	303	Star Wars: Episode III – Revenge of the Sith	1,814
More 4, 4Seven and E4	656	239	The Inbetweeners Movie (UK)	1,169
Sahara One	596	4	Dil Vil Pyar Vyar	45
Rishtey	581	15	Khiladi 786	115
5 USA	411	189	The Expendables	784
5*	409	172	The Book of Eli	533
Horror Channel	409	17	Quatermass and the Pit (UK)	127
Syfy	289	47	Jaws	193
True Entertainment, True Drama and True Movies 1-2	274	10	I'll Be Home for Christmas	152
Movies 24 and Movies 24+	278	6	Chloe	43
Sunrise TV	224	3	Benaam Badsha	22
Watch, Gold, Dave, Really, Drama, Alibi and Yesterday	213	107	Sister Act 2: Back in the Habit	365
BBC Three, BBC Four and BBC HD	200	514	Raiders of the Lost Ark	1,590
Viva	157	39	White Chicks	153
Sky 1-2	94	115	Independence Day	349

Source: Attentional, BARB

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

The top film on digital multi-channel in 2013 (in terms of total audience across all transmissions) was *The Bourne Supremacy* on ITV2 with a total audience of 6.3 million from 10 transmissions (Table 13.10). As in 2012, ITV2 dominates the top 10, with eight films.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 13.10 Top 10 feature films on free-to-air digital multi-channel television, 2013

	Title	Channel	Number of transmissions	Country of origin	Year of theatrical release	Total audience[1] (million)
1	The Bourne Supremacy	ITV2	10	USA/Ger	2004	6.3
2	Johnny English	ITV2	9	UK/USA	2003	6.2
3	Mr Bean's Holiday	ITV2/CITV	13	UK/USA	2007	6.0
4	Peter Pan	ITV2/CITV	12	USA	2003	5.9
5	Shaun of the Dead	ITV2	10	UK/USA	2004	5.9
6	Hot Fuzz	ITV2	8	UK/USA	2007	5.3
7	Iron Man	Film4/E4	8	USA	2008	5.2
8	The Shawshank Redemption	ITV2	6	USA	1994	5.2
9	Mamma Mia!	ITV2	8	UK/USA	2008	5.2
10	Red	Film4	4	USA	2010	5.1

Source: Attentional, BARB

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

Table 13.11 outlines the number of film transmissions, the average audience and the top film on the UK's pay TV film channels in 2013. The various Sky Movies channels broadcast a total of 1,179 unique titles across 39,162 slots with an average audience of nearly 11,000, while Disney Cinemagic broadcast 27 titles across 408 slots with an average audience of almost 18,000. The highest rated broadcast of a film on UK pay TV was *Wreck-It Ralph* with 558,600 viewers on Sky Movies Premiere. UK films made up just over 14% of all 1,324 films shown on pay TV film channels; this equates to 181 unique titles and an audience of just under 79 million.

The number of films and transmissions for the pay TV channels were lower in 2013 than in 2012; this may be partly due to +1 channels not being included in the dataset and the new Sky Movies channel, Sky Movies Disney, affecting the number of films shown on Disney Cinemagic. However, the average audience has increased for all channels.

Table 13.11 Feature films on pay TV film channels, 2013

Channel	Number of film transmissions	Average film audience	Top Film[1]	Audience for top film
Disney Cinemagic	408	17,891	Cars 2	111,300
MGM HD	1,576	1,069	Tank Girl	40,000
Sky Movies	39,162	10,963	Wreck-It Ralph	558,600

Source: Attentional, BARB

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

Table 13.12 shows the top 10 films in terms of combined viewings on the pay TV film channels in 2013. The top film at the UK box office in 2012, *Skyfall*, was the most popular film shown on pay TV channels in 2013, with a total audience of 4.9 million from 93 transmissions across the Sky Movies channels. All films in the top 10 were shown on Sky Movies and were released theatrically in 2012, with the exception of *Ice Age* which was released in 2002.

Table 13.12 Top 10 feature films[1] on pay TV film channels, 2013

	Title	Channel	Number of transmissions	Country of origin	Year of theatrical release	Total Audience (million)
1	Skyfall	Sky Movies	93	UK/USA	2012	4.9
2	Brave	Sky Movies	96	USA	2012	4.8
3	Ice Age	Sky Movies	102	USA	2002	4.5
4	Madagascar 3: Europe's Most Wanted	Sky Movies	73	USA	2012	4.4
5	Battleship	Sky Movies	111	USA	2012	4.2
6	The Amazing Spider-Man	Sky Movies	105	USA	2012	3.9
7	Rise of the Guardians	Sky Movies	79	USA	2012	3.7
8	The Pirates! In an Adventure with Scientists	Sky Movies	124	UK/USA	2012	3.6
9	We Bought a Zoo	Sky Movies	92	USA	2012	3.4
10	John Carter	Sky Movies	151	UK/USA	2012	3.3

Source: Attentional, BARB

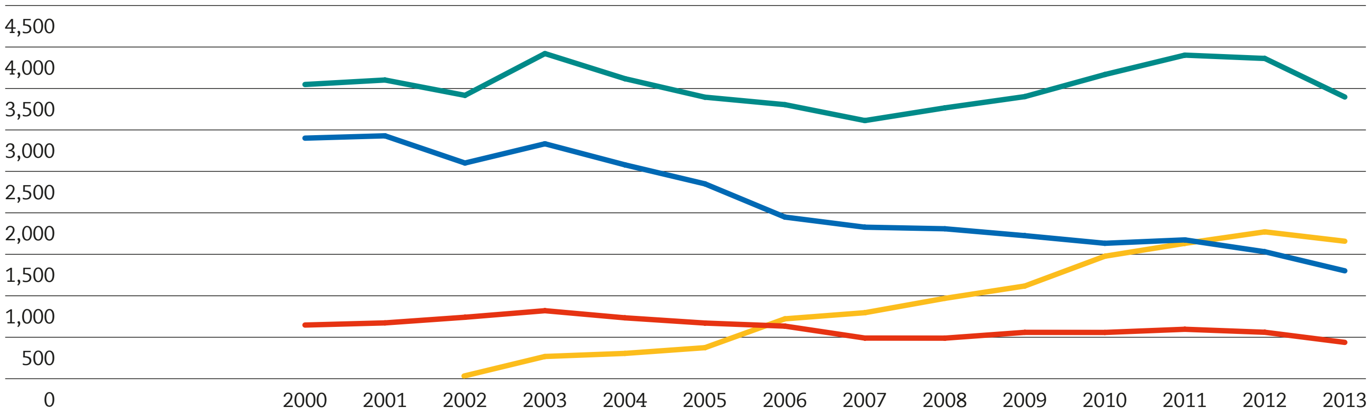
[1] Films with the highest total audience for all transmissions across all subscription film channels.

13.6 The audience for film on all television channels, 2000-2013

In 2013, there were almost 3.4 billion viewings of film on television in the UK (Figure 13.5), compared with cinema admissions of 165.5 million. This represents approximately 53 film viewings per person per year, down from 61 in 2012. Audience numbers decreased across all television platforms, including digital multi-channel, which saw the first ever drop in audience numbers since the introduction of digital television in 2002. However, multi-channel film viewings were greater than terrestrial viewings for the second year in a row. Pay TV channels had the smallest audience with 438 million viewers.

Figure 13.5 Total audience for feature film on television (except pay-per-view), 2000-2013

Million



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Terrestrial	2,901	2,929	2,601	2,833	2,579	2,350	1,949	1,827	1,808	1,725	1,633	1,674	1,531	1,301
Pay TV film channels	647	673	741	820	734	671	634	490	489	559	558	596	560	438
Other digital multi-channel	–	–	75	268	305	374	722	796	969	1,118	1,477	1,632	1,771	1,658
Total	**3,548**	**3,602**	**3,417**	**3,921**	**3,618**	**3,395**	**3,305**	**3,113**	**3,266**	**3,402**	**3,668**	**3,902**	**3,862**	**3,397**

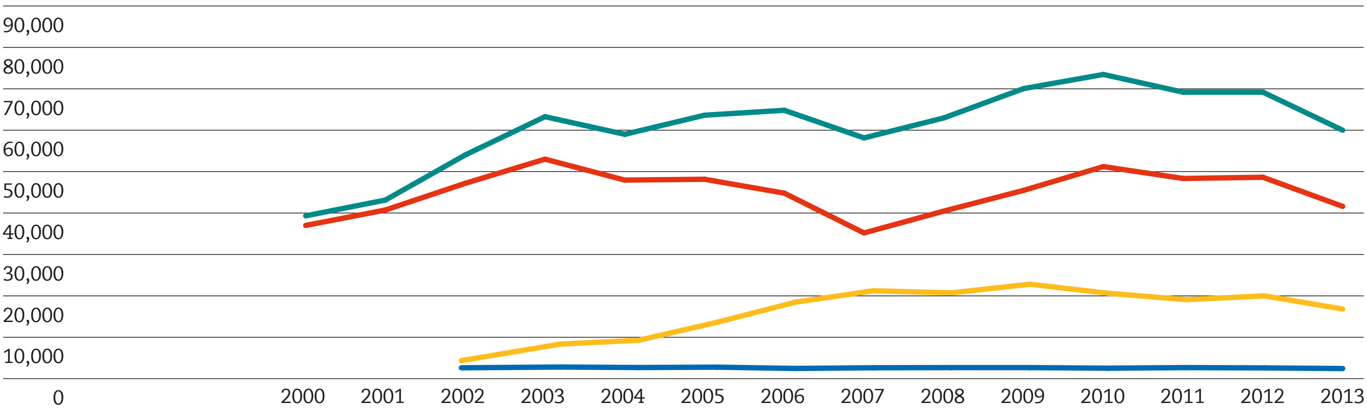
Source: BFI RSU, Attentional, BARB

Figure 13.6 shows the total number of film transmissions on television since 2000. The total number of screenings decreased from 69,900 transmissions in 2012 to 59,500 in 2013. Total transmissions have generally been decreasing since the peak of 73,000 in 2010.

In terms of unique film titles, there were 1,800 films broadcast on terrestrial, 1,324 titles on the pay TV film channels and 3,817 on other digital channels. Overall, 6,941 individual film titles were shown across all television channels in 2013.

Figure 13.6 Total number of film transmissions on all television channels (except pay-per-view), 2000-2013

Number



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Terrestrial	2,318	2,405	2,275	2,355	2,234	2,326	2,011	2,182	2,221	2,218	2,075	2,221	2,141	1,990
Pay TV film channels	36,547	40,277	46,720	52,552	47,499	47,698	44,346	34,737	40,014	45,015	50,756	47,889	48,184	41,146
Other digital multi-channel	–	–	4,573	7,900	8,821	13,144	17,998	20,765	20,274	22,359	20,174	18,622	19,541	16,352
Total	**38,865**	**42,682**	**53,568**	**62,807**	**58,554**	**63,168**	**64,355**	**57,684**	**62,509**	**69,592**	**73,005**	**68,732**	**69,866**	**59,542**

Source: BFI RSU, Attentional

Note: 2012 figures have been revised since publication of the 2013 Statistical Yearbook.

13.7 The value of feature film to broadcasters

Based on a model developed by Attentional, the BFI Research and Statistics Unit has estimated the value of feature film to UK broadcasters to be approximately £1.6 billion in 2013. Although the number of film transmissions and audience size were down on 2012, the estimated value increased by approximately £66 million. This figure is derived from the annual revenue per channel – ie net advertising revenue for the commercial channels, subscription revenues for the pay TV channels and the proportion of licence fee applied to programming on the BBC channels – multiplied by the percentage of broadcast hours for feature film.

- For cinema admissions see Chapter 1 (page 10)
- For more on audiences see Chapter 15 (page 157)
- For an overview of the film market as a whole see Chapter 14 (page 151)

Image: ***Mandela: The Long Walk to Freedom*** **© 2013 Long Walk To Freedom (Pty) Ltd**

Chapter 14
The UK film market as a whole

The UK is the third largest film market in the world, generating revenues in excess of £4 billion. Cinema-going was the most significant component of the film value chain in 2013, generating revenues of £1.1 billion.

FACTS IN FOCUS:

The total filmed entertainment market in the UK in 2013 was worth an estimated £4 billion, the same as in 2012.

Terrestrial and multi-channel television and VoD revenues all recorded increases, but theatrical, physical video and pay television revenues declined.

Sell-through video on physical media fell to £940 million, but it still accounted for 23% of the market; Video on Demand increased to £323 million, accounting for 8% of the market.

Gross revenues for UK film were an estimated £900 million in 2013, down from £1 billion in 2012.

The UK had the third largest filmed entertainment market in the world after the USA and Japan.

14.1 The UK filmed entertainment market as a whole

In 2013, theatrical revenues were the most significant component of the film value chain in the UK. As Table 14.1 shows, the box office accounted for 27% of total revenues (£1.1 billion) with video retail accounting for 23% (£940 million). Theatrical revenues were the same in 2012 at £1.1 billion (a 27% share of the UK market) while video retail grossed £968 million (24%). Gross television revenues increased by 4% from £1.5 billion to £1.6 billion, due mostly to a rise in multi-channel income, although much of this accrued to the television industry rather than to the suppliers of film.

Gross revenues for UK films were estimated to be £900 million, with market share for UK films highest in terrestrial television (29%) followed by theatrical, video rental and video retail (all at 24%). Terrestrial television, video retail and VoD saw increases in revenue for UK film, with VoD having the largest increase of £21 million, from £52 million in 2012 to £73 million in 2013.

Table 14.1 UK filmed entertainment market, 2012 and 2013

	2012			2013		
Window	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	1,099	377	34	1,083	256	24
Video rental (physical)	229	53	23	166	40	24
Video retail (physical)	968	223	23	940	225	24
Pay TV	671	133	20	596	121	20
Terrestrial TV	205	45	22	241	69	29
Other digital multi-channel	615	126	21	720	111	15
VoD	236	52	22	323	73	23
Total	**4,023**	**1,009**	**25**	**4,069**	**895**	**22**

Source: Rentrak, BVA, Official Charts Company, Attentional, IHS, BFI RSU analysis

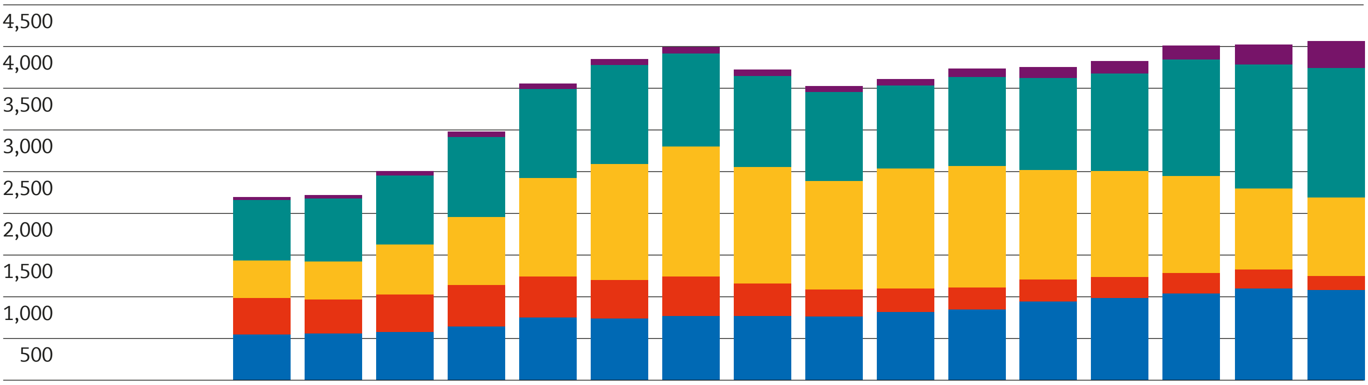
Notes:
'Theatrical' is the total gross UK theatrical revenues (including VAT) in the calendar years 2012 and 2013 for all films exhibited in the UK. See Chapter 1.
'Video rental (physical)' is the total revenue from physical video rental (DVD, Blu-ray, etc) transactions in the calendar years 2012 and 2013. See Chapter 11.
'Video retail (physical)' is the total revenue from physical video retail transactions in the calendar years 2012 and 2013. See Chapter 11.
The television values are retail equivalent values calculated from the dataset of films shown on UK television. Values are estimated by multiplying the film share of the total channel time by the total revenue applicable to that channel (licence fee, subscription or advertising revenue). Television values cover terrestrial, pay TV and other digital multi-channel. See Chapter 13.
Video on Demand revenues are derived from IHS estimates of the combined size of the television and online markets. UK share is based on an estimate derived from knowledge of UK film share in the pay TV and video markets. 2012 figures revised since the 2013 Yearbook. See Chapter 12.
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 television 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 Chapter 21 for UK film export revenues.
Figures may not sum to totals due to rounding.

14.2 The evolution of UK film revenues, 1998-2013

Aggregate film revenues increased rapidly from 1999 to 2004 with the emergence of the DVD format before falling in 2005 and 2006 (Figure 14.1). Growth resumed in 2007, with increased theatrical and television revenues compensating for a decline in the value of the physical rental and retail markets. Combined revenues from television-based and online on-demand services remain a small but growing component (8%) of the overall film value chain.

Figure 14.1 Gross film revenues, all platforms, 1998-2013

£ million



	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Theatrical	547	563	583	645	755	742	770	770	762	821	850	944	988	1,040	1,099	1,083
Rental video (physical)	437	408	444	494	494	462	476	389	327	280	265	263	253	246	229	166
Retail video (physical)	453	451	601	821	1,175	1,392	1,557	1,399	1,302	1,440	1,454	1,311	1,267	1,165	968	940
Film on television	726	755	826	954	1,066	1,182	1,119	1,089	1,066	994	1,067	1,108	1,173	1,398	1,491	1,557
Film on VoD	33	40	50	65	63	68	73	74	67	75	101	127	145	162	236	323
Total	**2,196**	**2,217**	**2,504**	**2,979**	**3,553**	**3,846**	**3,995**	**3,721**	**3,524**	**3,610**	**3,737**	**3,753**	**3,826**	**4,011**	**4,023**	**4,069**

Source: Rentrak, BVA, Official Charts Company, Attentional, IHS, BFI RSU analysis

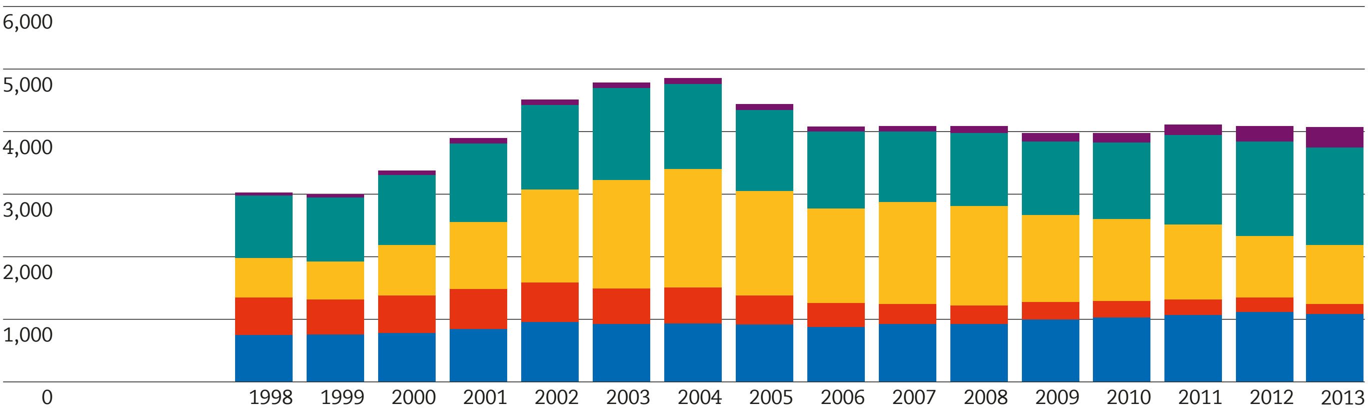
Notes:
'Film on television' covers terrestrial, pay TV and other multi-channel. Television-based VoD is included within the VoD total.
2008-2012 figures for film on VoD revised since the 2013 Yearbook.
Platform revenues may not sum to totals due to rounding.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

The revenues shown in Figure 14.1 are the actual figures; if adjusted for inflation (Figure 14.2), the decline in revenues from 2004 is clear, with the 2013 market down 16% from the peak. In real terms, film revenues have plateaued since 2006.

Figure 14.2 Gross inflation-adjusted film revenues, all platforms, 1998-2013 (expressed in 2013 pounds)

2013 £ million



	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Theatrical	754	763	785	843	959	922	935	918	883	930	930	1,001	1,027	1,067	1,117	1,083
Rental video (physical)	602	553	598	646	627	574	578	464	379	317	290	279	263	252	233	166
Retail video (physical)	624	612	810	1,074	1,493	1,730	1,890	1,669	1,508	1,632	1,592	1,391	1,317	1,195	984	940
Film on television	1,000	1,023	1,113	1,247	1,354	1,470	1,358	1,299	1,235	1,126	1,168	1,175	1,219	1,435	1,516	1,557
Film on VoD	45	54	67	85	80	85	89	88	78	85	111	135	151	166	240	323
Total	**3,026**	**3,006**	**3,374**	**3,895**	**4,513**	**4,781**	**4,848**	**4,438**	**4,082**	**4,090**	**4,091**	**3,982**	**3,976**	**4,116**	**4,089**	**4,069**

Source: Rentrak, BVA, Official Charts Company, Attentional, ONS, IHS, BFI RSU analysis

Notes:
Actual revenues deflated by the UK GDP deflator.
'Film on television' covers terrestrial, pay TV and other digital multi-channel. Television-based VoD is included in the VoD total.
Figures may not sum to totals due to rounding.

14.3 The UK market in the global context

In 2013, the UK had the third largest filmed entertainment market in the world after the USA and Japan (Table 14.2). The USA accounted for just over 35% of the world market; Japan accounted for nearly 8% and the UK just under 7%. The next biggest individual territories were France, China, Germany and Canada.

Table 14.2 Filmed entertainment revenues by country/region, 2013

Country/region	£ million	%
USA	20,133	35.3
Japan	4,364	7.6
UK	3,939	6.9
Other Western Europe	3,376	5.9
France	2,466	4.3
China	2,464	4.3
Germany	2,457	4.3
Canada	2,120	3.7
Australia	1,974	3.5
South Korea	1,920	3.4
Other Asia Pacific	1,516	2.7
Brazil	1,396	2.4
India	1,148	2.0
Other Central and Eastern Europe	1,126	2.0
Russia	1,055	1.8
Mexico	1,003	1.8
Spain	897	1.6
Other Latin America	853	1.5
Italy	843	1.5
Taiwan	830	1.5
Middle East and Africa	663	1.2
Malaysia	569	1.0
Total	**57,112**	**100.0**

Source: PwC, *Global Entertainment and Media Outlook 2014-2018* www.pwc.com/outlook

Notes:
Some information contained in this table was taken from the filmed entertainment segment of the *Global Entertainment and Media Outlook 2014-2018*, www.pwc.com/outlook however, some calculations and categorisation of regions are our own.
'Filmed entertainment revenue' comprises both cinema revenue (including box office and advertising) and home video revenue (including both physical and digital home video and TV programming, and including sell-through, rental and subscription). This revenue is both digital and non-digital, and includes both consumer and advertising spending.
Figures may not sum to totals due to rounding.
Other Western Europe comprises Austria, Belgium, Denmark, Finland, Greece, Republic of Ireland, Netherlands, Norway, Portugal, Sweden and Switzerland.
Other Asia Pacific comprises Hong Kong, Indonesia, New Zealand, Pakistan, Philippines, Singapore, Thailand and Vietnam.
Other Central and Eastern Europe comprises Czech Republic, Hungary, Israel, Poland, Romania and Turkey.
Middle East and 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 and Venezuela.

According to PricewaterhouseCoopers forecasts, the USA will remain the top market for filmed entertainment over the next four years but the UK will overtake Japan to become the second largest market. China will also overtake Japan, and France, to become the world's third largest market. The global shares of Germany, Canada and Australia are expected to fall, while those of South Korea, Brazil and India will increase.

Table 14.3 Filmed entertainment revenues by country/region, forecast for 2018

Country/region	£ million	%
USA	25,336	35.6
UK	4,649	6.5
China	4,547	6.4
Japan	4,494	6.3
Other Western Europe	3,725	5.2
France	3,216	4.5
Germany	2,896	4.1
Canada	2,316	3.3
Australia	2,236	3.1
South Korea	2,084	2.9
Brazil	1,934	2.7
India	1,904	2.7
Other Asia Pacific	1,750	2.5
Russia	1,745	2.5
Other Central and Eastern Europe	1,527	2.1
Other Latin America	1,370	1.9
Mexico	1,265	1.8
Italy	990	1.4
Spain	978	1.4
Middle East and Africa	938	1.3
Taiwan	798	1.1
Malaysia	531	0.7
Total	**71,230**	**100.0**

Source: PwC, *Global Entertainment and Media Outlook 2014-2018* www.pwc.com/outlook

Notes
Some information contained in this table was taken from the filmed entertainment segment of the *Global Entertainment and Media Outlook 2014-2018*, www.pwc.com/outlook however, some calculations and categorisation of regions are our own.
Figures may not sum to totals due to rounding.
See Notes to Table 14.2.

- For more on the box office see Chapter 1 (page 10)
- For more on physical video see Chapter 11 (page 121)
- For further details about the Video on Demand market see Chapter 12 (page 131)
- For more on film on television see Chapter 13 (page 138)
- For information on the export revenues of the UK film industry see Chapter 21 (page 220)

Image: ***Sunshine on Leith*** **courtesy of Entertainment Film Distributors**

Chapter 15

Audiences

The audience lies at the heart of a vibrant and successful film economy and culture, yet current insight provides a limited perspective on audience engagement. New research is needed to show the full picture of the audience on all platforms.

FACTS IN FOCUS:

In 2013, the 15-24 age group made up the largest proportion of UK cinema admissions, at 33%.

Hangover Part III had the largest above-average audience share among the 15-24 age group, while *Quartet* had the largest share among cinema-goers aged 55 and above.

A wide range of genres appealed to women, whereas action films, comedies and thrillers were popular with men, with *Captain Phillips* and *Alan Partridge: Alpha Papa* drawing larger than average audiences.

UK films were popular across all demographic groups, with a particularly strong appeal for those aged 45 and above. Older audiences also showed a strong preference for UK independent films.

Black and minority ethnic groups were over-represented among buyers of cinema tickets, video rental and digital film; disabled audiences were over-represented amongst video buyers.

15.1 Audiences for film in the UK

In previous editions of the Yearbook, we have been able to estimate the total size of the film audience in the UK based on data from a range of sources. In the last few years, however, while we have been able to track a significant growth in revenues for online services (see Chapter 12) we have been unable to define viewing figures for films accessed online via streaming or download-to-own.

As we have seen in previous chapters, in 2013 linear television remained the most popular platform in the UK for watching film, while cinema-going outperformed physical video sales for the second year in a row, since our records began, and remains the largest single revenue source for the film industry.

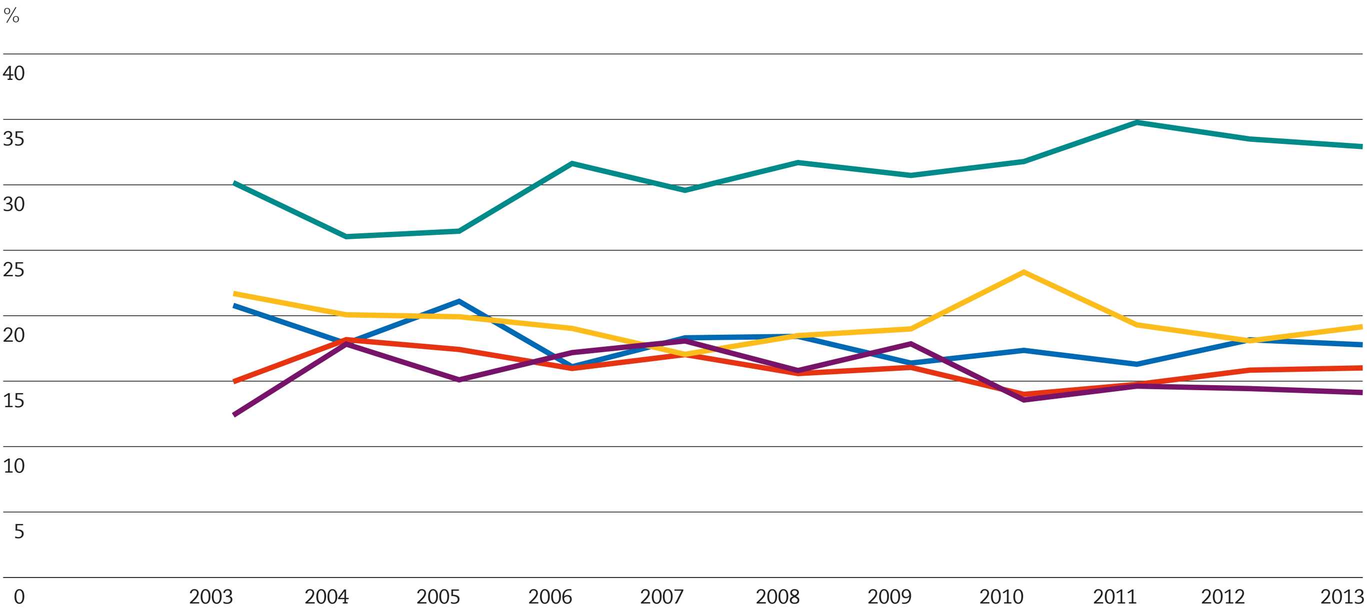
In this chapter, we look at UK cinema admissions by age, cinema-goers' film preferences by age, gender, geographical location and social groups, and film consumption by ethnicity and disability.

15.2 Cinema audience by age

We have previously presented age trends of the cinema-going population based on several survey sources, but further data investigation showed that admissions data provide a more robust picture of cinema audience demographics. Figure 15.1 shows the age trends of cinema admissions from 2003 to 2013. The relative proportion of admissions for each age group has been broadly similar throughout the time period, with fluctuations based on the release of a small number of successful titles with a strong appeal to particular age groups. However, there was an upward trend in the percentage of admissions for the 15-24 age group between 2005 and 2011 when it increased from 26% to a peak of 35%. Overall, this age group has had the highest proportion of admissions throughout the period.

Interestingly, the proportion of admissions for 7-14 and 35-44 year olds have been very similar which may be due to parents and carers taking their children to the cinema, a finding reflected in the next section showing films with above-average audiences for the different age groups.

Figure 15.1 Age distribution of admissions, 2003-2013



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
7-14	12	18	15	17	18	16	18	14	15	14	14
15-24	30	26	26	32	30	32	31	32	35	34	33
25-34	22	20	20	19	17	18	19	23	19	18	19
35-44	15	18	17	16	17	16	16	14	15	16	16
45+	21	18	21	16	18	18	16	17	16	18	18

Source: CAA, Film Monitor

15.3 Film preferences by age

Tables 15.1-15.6 outline films with a statistically significant above-average audience share across different age groups to show the range of films that appealed most to each group. UK films had a significant appeal across all age groups, and a preference for UK films grew in line with the audience age, with the exception of the 35-44 age group, which includes many parents and carers accompanying younger children. Both the 45-54 and 55+ age groups showed a strong preference for UK independent films.

Animations such as *Wreck-it Ralph*, *Despicable Me 2* and *Monsters University* were of particular appeal to the 7-14 age group but the film with the highest significant above-average audience in this category was the boy-band concert documentary *One Direction: This Is Us* (Table 15.1). Comedies and action films appealed most to 15-24 year olds, where the films with the highest significant above-average audiences were *The Hangover Part III*, *Kick-Ass 2* and *Fast & Furious 6* (Table 15.2). Action films also appealed strongly to 25-34 year olds (Table 15.3). The film with the highest significant above-average audience in this category was the western *Django Unchained*, followed by *Fast & Furious 6*, *Rush* and *Trance*. Many of the films with an above-average audience in this age group also appealed strongly to 15-24 year olds. Parents and carers in the 35-44 age group meant that *Frozen*, *The Croods* and *Jack the Giant Slayer* were the only films with above-average audiences in this category (Table 15.4). A wide variety of genres including musical, action, drama, sci-fi and romantic comedy were popular with cinema-goers in the 45-54 age range (Table 15.5). *Sunshine on Leith*, *Rush* and *Filth* had the highest significant above-average audiences in this category. For audiences in the 55+ age group, drama, biopic and musical films had the greatest appeal, with *Quartet*, *Philomena* and *Les Misérables* attracting the highest significant above-average audiences (Table 15.6). It is estimated that *Quartet* was seen by almost 90% of cinema-goers in this age group.

Table 15.1 Films with an above-average audience in the 7-14 age group, 2013 top 20 films and top UK films[1]

Title	Age group % of the film's total audience
One Direction: This Is Us (UK)	49
Wreck-It Ralph	35
Despicable Me 2	34
Monsters University	33
The Croods	32
Frozen	29
Oz the Great and Powerful	29
Jack the Giant Slayer (UK)	26
7-14 age group in top 20 and top UK audience (%)	15
7-14 age group in total survey population (%)	13

Source: CAA Film Monitor

Notes
[1] Audience data were only available for 23 of the 35 top 20 films and top UK films released in 2013.
'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 2013, 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 102 film titles (mostly mainstream) of the 698 theatrical releases in 2013. 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 last three months. Films are also age-filtered based on the film certificate.

Table 15.2 Films with an above-average audience in the 15-24 age group, 2013 top 20 films and top UK films

Title	Age group % of the film's total audience
The Hangover Part III	60
Kick-Ass 2 (UK)	58
Fast & Furious 6 (UK)	50
The World's End (UK)	49
World War Z (UK)	47
The Hunger Games: Catching Fire	46
Thor: The Dark World (UK)	36
Man of Steel	36
Django Unchained	36
Iron Man 3	35
15-24 age group in top 20 and top UK audience (%)	32
15-24 age group in total survey population (%)	29

Source: CAA Film Monitor

Notes:
Audience data were only available for 34 of the 35 top 20 films and top UK films released in 2013.
See notes in Table 15.1.

Table 15.3 Films with an above-average audience in the 25-34 age group, 2013 top 20 films and top UK films

Title	Age group % of the film's total audience
Django Unchained	26
Fast & Furious 6 (UK)	26
Rush (UK)	26
Trance (UK)	25
Captain Phillips (UK)	25
The Hangover Part III	24
Man of Steel	24
Kick-Ass 2 (UK)	23
World War Z (UK)	23
Thor: The Dark World (UK)	23
25-34 age group in top 20 and top UK audience (%)	17
25-34 age group in total survey population (%)	19

Source: CAA Film Monitor

See notes to Table 15.2.

Table 15.4 Films with an above-average audience in the 35-44 age group, 2013 top 20 films and top UK films

Title	Age group % of the film's total audience
Frozen	27
The Croods	25
Jack the Giant Slayer (UK)	24
Gravity (UK)	*21*
Filth (UK)	20
35-44 age group in top 20 and top UK audience (%)	16
35-44 age group in total survey population (%)	16

Source: CAA Film Monitor

Notes:
See notes to Tables 15.2.
Films in italics do not have statistically significant above-average audiences but are included to give a fuller impression of preferred films in this age group.

Table 15.5 Films with an above-average audience in the 45-54 age group, 2013 top 20 films and top UK films

Title	Age group % of the film's total audience
Sunshine on Leith (UK)	21
Rush (UK)	18
Filth (UK)	17
Trance (UK)	16
Philomena (UK)	15
Red 2 (UK)	15
I Give It a Year (UK)	15
Star Trek Into Darkness	14
Thor: The Dark World (UK)	13
Les Misérables (UK)	12
45-54 age group in top 20 and top UK audience (%)	9
45-54 age group in total survey population (%)	9

Source: CAA Film Monitor

See notes to Tables 15.2.

Table 15.6 Films with an above-average audience in the 55+ age group, 2013 top 20 films and top UK films

Title	Age group % of the film's total audience
Quartet (UK)	87
Philomena (UK)	64
Sunshine on Leith (UK)	49
Les Misérables (UK)	43
The Great Gatsby	36
Captain Phillips (UK)	28
About Time (UK)	18
55+ age group in top 20 and top UK audience (%)	12
55+ age group in total survey population (%)	10

Source: CAA Film Monitor

See notes to Tables 15.2.

15.4 Film preferences by gender

The overall audience for the top 20 and top UK films in 2013 had a slight bias towards males who made up 53% of total cinema-goers for these films. On an individual basis, some films attracted substantially more of one gender than the other. Table 15.7 shows the top six films with statistically significant above-average female and male audiences, and the six films that had no significant gender appeal. As in 2012, males preferred thriller, action and comedy films with *Captain Phillips*, *Star Trek Into Darkness* and *Alan Partridge: Alpha Papa* topping the list of films with a greater appeal to male audiences. Again as in 2012, female audiences preferred a broader range of genres with *One Direction: This Is Us*, *About Time* and *Frozen* having the highest appeal. Female audiences had a stronger preference for UK films in 2013, unlike 2012 when the majority of films attracting above-average male audiences were British.

Table 15.7 Audience gender split, 2013 top 20 films and top UK films

Significant greater male audience share	Male %	Female %
Captain Phillips (UK)	69	31
Star Trek Into Darkness	69	31
Alan Partridge: Alpha Papa (UK)	69	31
Man of Steel	68	32
Django Unchained	68	32
Kick-Ass 2 (UK)	67	33

Significant greater female audience share	Male %	Female %
One Direction: This Is Us (UK)	15	85
About Time (UK)	27	73
Frozen	34	66
Sunshine on Leith (UK)	35	65
Les Misérables (UK)	39	61
Philomena (UK)	39	61

Gender difference not significant	Male %	Female %
Filth (UK)[1]	61	39
Rush (UK)	59	41
Trance (UK)	52	48
Wreck-It Ralph	49	51
The Hunger Games: Catching Fire	48	52
Jack the Giant Slayer (UK)	47	53

Source: CAA Film Monitor

[1] *Filth* does not have significant gender appeal due to the low number of people captured in the Film Monitor survey.

15.5 Film preferences by social group

UK films were popular among all social groups (see Glossary for an outline of social groups), often attracting a significant above-average audience share. Tables 15.8-15.11 outline films with an above-average audience to show the range of films that appealed most to each group in 2013.

Dramas, biopics, musicals and comedies appealed most to the AB social group, with *Quartet*, *Philomena* and *Les Misérables* attracting the highest above-average audiences. *The Great Gatsby* was the only non-UK film to attract a significant above-average audience (Table 15.8).

Table 15.8 Films with above-average AB audience share, 2013 top 20 films and top UK films

Title	AB group % of film's total audience
Quartet (UK)	51
The Great Gatsby	50
Philomena (UK)	49
Les Misérables (UK)	43
Alan Partridge: Alpha Papa (UK)	43
Sunshine on Leith (UK)	43
AB share of top 20 and top UK audience (%)	31
AB in total survey population (%)	29

Source: CAA Film Monitor

See notes to Table 15.2.

The C1 social group were attracted to a range of genres, including action, sci-fi and drama (Table 15.9). The most popular titles amongst audiences in this group were *Rush*, *Captain Phillips* and *Gravity*.

Table 15.9 Films with above-average C1 audience share, 2013 top 20 films and top UK films

Title	C1 group % of film's total audience
Rush (UK)	53
Captain Phillips (UK)	47
Gravity (UK)	43
Filth (UK)	42
About Time (UK)	42
C1 share of top 20 and top UK audience (%)	33
C1 in total survey population (%)	33

Source: CAA Film Monitor

See notes to Table 15.2.

Family films, comedies and action films appealed most to the C2 and DE groups (Tables 15.10 and 15.11). *Fast & Furious 6* and *Despicable Me 2* attracted above-average audiences in both groups.

Table 15.10 Films with above-average C2 audience share, 2013 top 20 films and top UK films

Title	C2 group % of film's total audience
Oz the Great and Powerful	29
Fast & Furious 6 (UK)	27
Despicable Me 2	24
C2 share of top 20 and top UK audience (%)	22
C2 in total survey population (%)	21

Source: CAA Film Monitor

See notes to Table 15.2

Table 15.11 Films with above-average DE audience share, 2013 top 20 films and top UK films

Title	DE group % of film's total audience
Fast & Furious 6 (UK)	23
World War Z (UK)	23
Red 2 (UK)	22
Despicable Me 2	19
DE share of top 20 and top UK audience (%)	17
DE in total survey population (%)	15

Source: CAA Film Monitor

See notes to Table 15.2.

15.6 Film preferences by nation or region

The national/regional distribution of audiences for the 2013 top 20 films and top UK films focuses on releases that attracted an above-average audience in each ISBA television region as defined by the Cinema Advertising Association (for ease of understanding the data are presented by geographic region). Every region had at least two films which attracted an above-average audience, except the East of England which had no top 20 and top UK films with a significant above-average audience. Tables 15.12-15.17 show the nations/regions which had three or more films with a significant above-average audience (except Wales), to give an impression of the range of films that appealed most in each area. UK films attracted above-average audiences in all nations/regions apart from the East of England and Wales.

The West and South West had the highest number of releases with a significant above-average audience, with five films including *About Time*, *The World's End* and *Despicable Me 2* (Table 15.12).

Table 15.12 Films with above-average West and South West audience share, 2013 top 20 films and top UK films

Title	West and South West % of film's total audience
About Time (UK)	6
The World's End (UK)	5
Despicable Me 2	4
Monsters University	4
The Croods	4
West and South West share of top 20 and top UK audience (%)	2
West and South West in total survey population (%)	2

Source: CAA Film Monitor

West and South West corresponds to the ISBA TSW region.
See notes to Table 15.2.

The western *Django Unchained* attracted the highest significant above-average audience in London and the home counties, followed by *Fast & Furious 6* and *Gravity* (Table 15.13).

Table 15.13 Films with above-average London and the home counties audience share, 2013 top 20 films and top UK films

Title	London/home counties % of film's total audience
Django Unchained	31
Fast & Furious 6 (UK)	30
Gravity (UK)	28
I Give It a Year (UK)	27
London/home counties share of top 20 and top UK audience (%)	21
London/home counties in total survey population (%)	23

Source: CAA Film Monitor

London and the home counties corresponds to the ISBA LWT Carlton region.
See notes to Table 15.2.

Captain Phillips, *Jack the Giant Slayer* and *Philomena* were the only films amongst the audiences in Yorkshire to have a significant above-average audience share (Table 15.14).

Table 15.14 Films with above-average Yorkshire and The Humber audience share, 2013 top 20 films and top UK films

Title	Yorkshire and The Humber % of film's total audience
Captain Phillips (UK)	17
Jack the Giant Slayer (UK)	16
Philomena (UK)	15
Yorkshire and The Humber share of top 20 and top UK audience (%)	10
Yorkshire and The Humber in total survey population (%)	10

Source: CAA Film Monitor

Yorkshire and The Humber corresponds to the ISBA Yorkshire region.
See notes to Table 15.2.

Family orientated films and a boy-band concert documentary appealed most to audiences in the North East and Wales, with *One Direction: This Is Us* and *Despicable Me 2* attracting the highest significant above-average audiences in the North East and *Frozen* and *Monsters University* attracting the highest above-average audiences in Wales (Tables 15.15 and 15.16). Wales is the only nation/region not have a UK film with a significant above-average audience.

Table 15.15 Films with above-average North East audience share, 2013 top 20 films and top UK films

Title	North East % of film's total audience
One Direction: This Is Us (UK)	12
Despicable Me 2	10
Frozen	8
North East share of top 20 and top UK audience (%)	5
North East in total survey population (%)	5

Source: CAA Film Monitor

North East corresponds to the ISBA Tyne Tees region.
See notes to Table 15.2.

Table 15.16 Films with above-average Wales audience share, 2013 top 20 films and top UK films

Title	Wales % of film's total audience
Frozen	12
Monsters University	12
Wales share of top 20 and top UK audience (%)	8
Wales in total survey population (%)	7

Source: CAA Film Monitor

Wales corresponds to the ISBA HTV region.
See notes to Table 15.2.

Audiences in Scotland have shown a preference for films based on home-grown characters and locations. In 2013, both *Sunshine on Leith* and *Filth* attracted significant above-average audiences.

Table 15.17 Films with above-average Scotland audience share, 2013 top 20 films and top UK films

Title	Scotland % of film's total audience
Sunshine on Leith (UK)	32
Filth (UK)	32
Star Trek Into Darkness	14
Scotland share of top 20 and top UK audience (%)	9
Scotland in total survey population (%)	9

Source: CAA Film Monitor

Scotland corresponds to the ISBA Border, STV and Grampian regions.
See notes to Table 15.2.

15.7 Film audience by ethnicity

Looking across film platforms, Black and minority ethnic groups (Asian, Chinese, mixed and other) were over-represented among buyers of cinema tickets, video rental and digital, and under-represented among video buyers, ie they comprised a greater proportion of consumers of these platforms than their proportion of the total population (Table 15.18). White audiences were over-represented among video buyers and under-represented among consumers of other platforms.

Table 15.18 Ethnicity of audiences aged 13+ for cinema, rental and retail video and digital, 2013

	Black, Asian, Chinese, mixed and other %	White %
Population aged 13+	7.4	92.6
Total buyers of cinema, rental, retail and digital film	7.0	93.0
Cinema-goers	9.4	90.6
Video buyers	4.6	95.4
Video renters	9.3	90.7
Digital buyers and renters	8.2	91.8

Source: Kantar Worldpanel

Notes:
Field work took place in November 2013. Purchased data for 52 weeks ending 19 January 2014. Video includes all physical video formats, including DVD, Universal Media Disc, high-definition DVD and Blu-ray disc. Digital includes subscription VoD services.

15.8 Film audiences by disability

As in 2013, disabled people were under-represented across all film platforms with the exception of physical sell-through. Disabled audiences were particularly under-represented among cinema-goers.

Table 15.19 Disabled audiences aged 13+ for cinema, retail and rental video and digital, 2013

	Disabled %	Not disabled %
Population aged 13+	16.5	83.5
Total buyers of cinema, rental, retail and digital film	14.9	85.1
Cinema-goers	11.3	88.7
Video buyers	16.8	83.2
Video renters	12.6	87.4
Digital buyers and renters	12.6	87.4

Source: Kantar Worldpanel

See notes to Table 15.18.

- For more on top films at the box office in 2013 see Chapter 2 (page 21)
- For more about film on video see Chapter 11 (page 121)
- For more on audiences for films on demand see Chapter 12 (page 131)
- For more on film on television see Chapter 13 (page 138)

Chapter 16

Film education

Film education offers children and young people opportunities to watch, understand and make films to enrich their lives, foster personal development, express their creativity and gain essential skills. For adult learners, film education can also be a stimulating part of lifelong learning.

FACTS IN FOCUS:

In 2013/14, Into Film supported over 8,000 film clubs across the UK reaching almost 282,000 children and young people.

In 2012/13, over 59,000 students were entered for GCSE media studies related subjects, over 1,500 students were entered for Scottish Intermediates, and over 28,000 students were enrolled in higher education media related courses.

Entries for GCSE, GCE and higher education media related courses have decreased since 2012, whereas entries for Scottish Intermediates and Highers have increased.

In 2013/14, the BFI Film Academy provided opportunities for over 800 16-19 year olds to develop new skills and build careers in the film industry.

16.1 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. It has 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.

This chapter presents the most up-to-date record of film education related data currently available, beginning with a look at activity in formal education settings.

16.2 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 increasingly used in other parts of the curriculum, such as Science, English or modern languages.

2013 saw the creation of Into Film, a charity focused on making film an integrated part of education for 5-19 year olds. It builds on the legacy of FILMCLUB and First Light, providers of film education and filmmaking opportunities for children and young people.

Supported by the BFI and a range of other funders, Into Film represents one of the largest ever investments in film education for the formal sector and is intended to 'create a critical shift from film education work *around* the school to work within the classroom'[1]. This is done primarily through providing educational resources to support the curriculum: incorporating film-based resources into lessons and providing resources for watching, making and learning about film within the network of existing schools' film clubs.

In 2013/14, Into Film trained and enabled 1,963 teaching professionals and youth leaders to work with film across the curriculum (including film studies), and 39,239 sets of educational resources were downloaded. Within the supported film clubs, 254 films were made over the year and a total of 5,082 children and young people participated in filmmaking activities. (As 2013 was a transition year, the data presented covers both FILMCLUB and Into Film activities. First Light activities for 2012/13 are included within Into Film activities.)

Since the launch of Into Film, the number of film clubs in each of the nations and regions has increased (with the exception of the Isle of Man). The total number of film clubs has risen by over 14% from 7,037 clubs in 2012/13 to 8,056 clubs in 2013/14. The reach of the film clubs has also increased, from 232,000 pupils in 2012/13 to 281,960 pupils in 2013/14.

The national/regional distribution of FILMCLUB and Into Film schools are shown in Figures 16.1 and 16.2.

[1] *Impact, Relevance and Excellence: a new stage for film education, BFI 2014*

Figure 16.1 National/regional distribution of FILMCLUB schools, 2012/13

Source: FILMCLUB

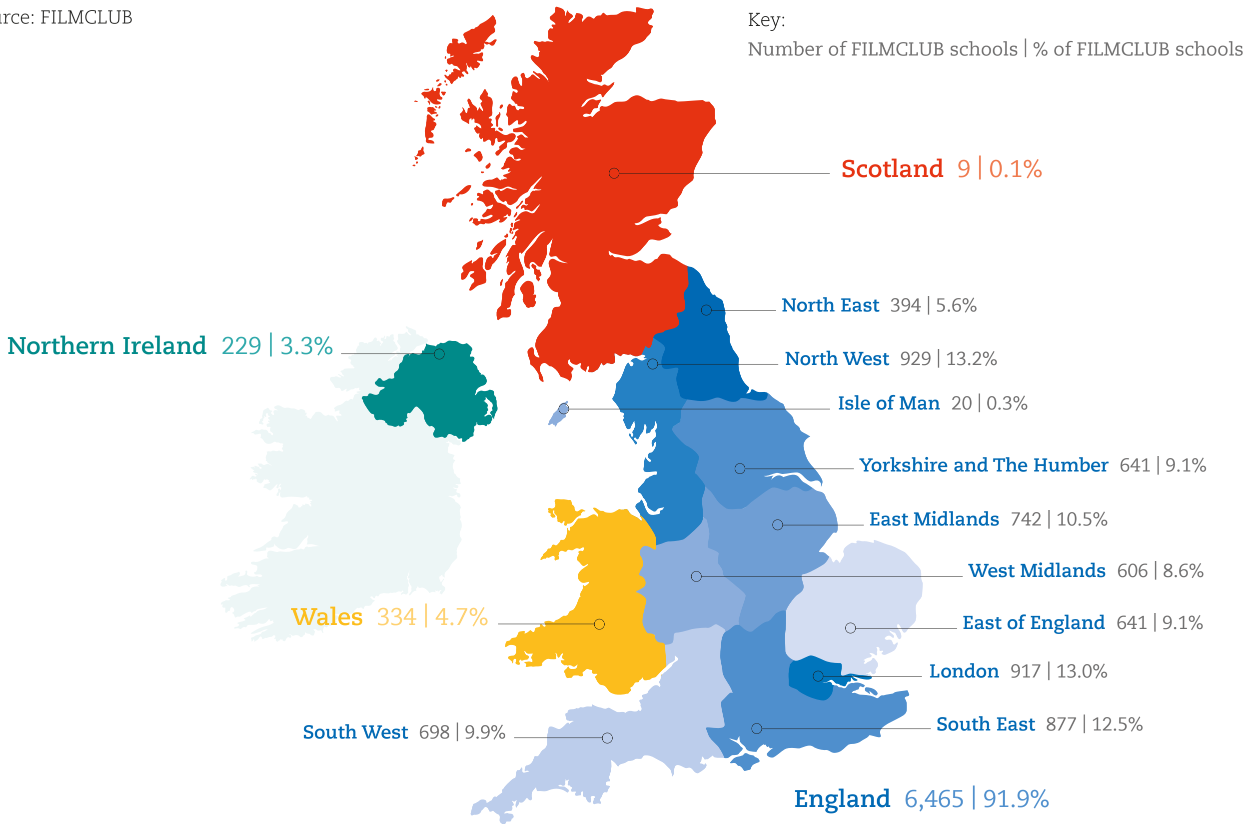
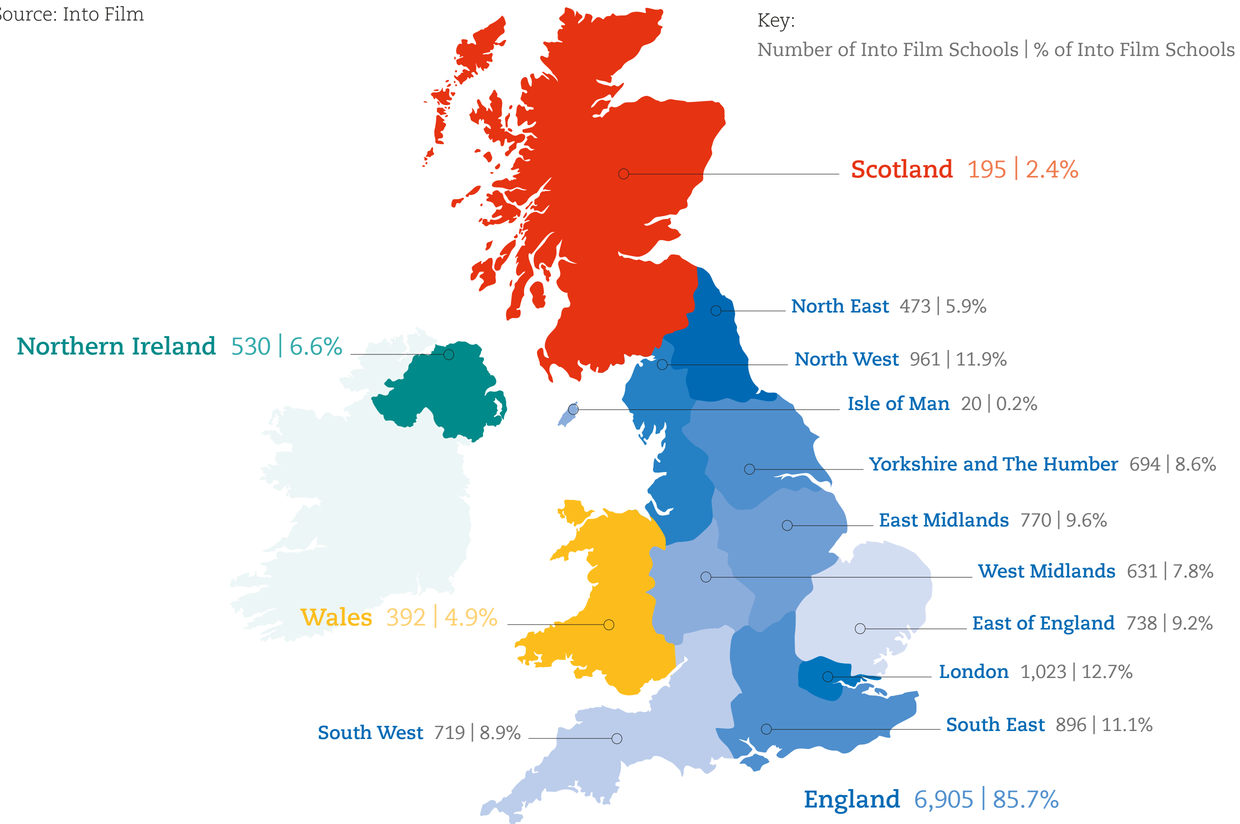


Figure 16.2 National/regional distribution of Into Film Schools, 2013/14

Source: Into Film



In 2013, Into Film launched the National Youth Film Festival (now the Into Film Festival) a UK-wide programme of free film screenings and related activities for children and young people. The festival aimed to build on the success of National Schools Film Week previously run by the industry-funded Film Education, which closed in April 2013. Over 246,000 children and young people attended the festival, which featured 132 UK and international films at 1,319 screenings in 407 cinemas. Table 16.1 shows attendances for National Schools Film Week and the National Youth Film Festival.

Table 16.1 Attendances at National Schools Film Week and the National Youth Film Festival

Year	National Schools Film Week	National Youth Film Festival
2002	75,490	–
2003	105,392	–
2004	125,761	–
2005	213,794	–
2006	259,964	–
2007	298,586	–
2008	335,733	–
2009	392,452	–
2010	473,000	–
2011	469,000	–
2012	541,744	–
2013	–	246,434

Source: Film Education, Into Film

In terms of film and media specific subjects taught in schools and colleges, there has been a 29% increase in the number of students entering GCSE media, film or TV studies in England, Wales and Northern Ireland since 2004/05, although numbers have fallen every year since a peak in 2007/08 (Table 16.2). Over 59,000 students entered in 2012/13, around 1% of all GCSE entries.

Table 16.2 Entries for GCSE media/film/TV studies in England, Wales and Northern Ireland, 2004-2013

Number of media/film/ TV studies entries	England	Wales	Northern Ireland	**Total**	All GCSE entries
2004/05	42,483	2,415	785	**45,683**	5,875,373
2005/06	54,126	2,615	780	**57,521**	5,736,505
2006/07	62,683	2,874	868	**66,425**	5,752,152
2007/08	65,693	3,288	842	**69,823**	5,827,319
2008/09	63,685	3,438	849	**67,972**	5,669,077
2009/10	63,134	3,705	925	**67,764**	5,469,260
2010/11	62,915	3,357	1,161	**67,433**	5,151,970
2011/12	57,451	2,905	1,324	**61,680**	5,225,288
2012/13	55,005	2,659	1,450	**59,114**	5,445,324
% change 2011/12-2012/13	-4.3	-8.5	9.5	**-4.2**	4.2
% change 2004-2013	29.5	10.1	84.7	**29.4**	-7.3

Source: Joint Council for Qualifications

Notes:
These numbers, published in August 2013, are provisional and do not include the results from any appeals, declines or late cash-ins.
Scotland is not included because of its separate examinations system.

Meanwhile, the number of entries for Scottish Intermediate media studies has increased almost every year since 2009 (Table 16.3). There were a total of 1,531 entries for Intermediate Level 1 and Level 2 in 2013, 0.7% of all Intermediate entries and an increase of over 7% compared with 2012. Since 2009 there has been a 20% increase in the number of entries.

Table 16.3 Entries for Scottish Intermediate media studies, 2009-2013

Number of media studies entries	Intermediate Level 1 entries	Intermediate Level 2 entries	**Total**	Intermediate Level 1 all entries	Intermediate Level 2 all entries	**Total all entries**
2009	493	781	**1,274**	65,735	122,463	**188,198**
2010	528	906	**1,434**	69,834	130,497	**200,331**
2011	617	756	**1,373**	72,324	134,573	**206,897**
2012	671	758	**1,429**	74,383	140,145	**214,528**
2013	636	895	**1,531**	69,605	144,382	**213,987**
% change 2012-2013	-5.2	18.1	**7.1**	-6.4	3.0	**-0.3**
% change 2009-2013	29.0	14.6	**20.2**	5.9	17.9	**13.7**

Source: Scottish Qualifications Authority

Notes:
These numbers, published in August 2013, are provisional and do not include the results from any appeals, declines or late cash-ins.
Scotland is not included because of its separate examinations system.

The number of students taking GCE A Level media, film or TV studies in England, Wales and Northern Ireland has risen by 3% since 2004/05, but fallen by almost 10% from 2011/12 (Table 16.4). Total entries peaked at 33,855 in 2010/11, but declined in the two succeeding years.

Table 16.4 Entries for GCE A Level media/film/TV studies in England, Wales and Northern Ireland, 2004-2013

Number of media/film/ TV studies entries	England	Wales	Northern Ireland	**Total**	All GCSE entries
2004/05	26,633	1,160	468	**28,261**	783,878
2005/06	29,123	1,239	602	**30,964**	805,698
2006/07	30,036	1,252	654	**31,942**	805,657
2007/08	30,651	1,353	745	**32,749**	827,737
2008/09	31,618	1,307	897	**33,822**	846,977
2009/10	31,032	1,380	963	**33,375**	853,933
2010/11	31,400	1,403	1,052	**33,855**	867,317
2011/12	29,682	1,288	1,141	**32,111**	861,819
2012/13	26,848	1,191	1,073	**29,112**	850,752
% change 2011/12-2012/13	-9.5	-7.5	-6.0	**-9.3**	-1.3
% change 2004-2013	0.8	2.7	129.3	**3.0**	8.5

Source: Joint Council for Qualifications

See notes to Table 16.2.

The number of entries for Scottish Higher media studies entries has increased every year since 2009 following a period of fluctuating numbers. In 2013, the number of entries was 977, an increase of 5% compared with 2012 (Table 16.5).

Table 16.5 Entries for Scottish Higher media studies, 2004-2013

Year	Number of media studies entries	All Higher entries
2004	827	165,575
2005	814	164,142
2006	843	159,140
2007	819	161,081
2008	797	162,576
2009	765	167,792
2010	803	175,614
2011	870	178,925
2012	927	181,699
2013	977	183,489
% change 2012-2013	5.4	1.0
% change 2004-2013	18.1	10.8

Source: Scottish Qualifications Authority

Note: These numbers, published in August 2013, are provisional and do not include the results from any appeals, declines or late cash-ins.

Study of the moving image and allied creative industries remains popular in UK higher education, through media and film studies courses. Over 28,000 students were enrolled on media studies related courses in 2012/13, up by 8% since 2003/04 but down by 11% on 2011/12 (Table 16.6). Entries for film studies increased year on year until 2011/12 where numbers peaked at 4,600. In 2012/13, the number of students fell slightly to 4,570. The number of students undertaking film production courses had the largest increase since 2003/04 (670%) growing from 135 in 2003/04 to 1,040 in 2012/13.

Table 16.6 Higher education students in the subject area media studies, 2003-2013

Year	Media studies	Film studies	Film production	All media studies related courses
2003/04	20,215	1,490	135	26,135
2004/05	20,200	1,840	165	26,495
2005/06	19,785	2,155	420	26,665
2006/07	18,995	2,540	545	27,010
2007/08	17,860	3,610	520	28,085
2008/09	17,595	3,815	530	28,245
2009/10	19,190	4,250	680	30,815
2010/11	19,690	4,500	675	31,480
2011/12	19,745	4,600	930	31,860
2012/13	15,780	4,570	1,040	28,260
% change 2011/12-2012/13	-20.1	-0.7	11.8	-11.3
% change 2003/04-2012/13	-21.9	206.7	670.4	8.1

Source: Higher Education Statistics Agency

Notes:

Figures have been rounded to the nearest multiple of 5.
Includes first degree, post-graduate and other degrees.
Media studies related courses include media, film, television, radio, electronic and print-based media studies courses.

Many of the media and film related higher education courses have been accredited by Creative Skillset, the UK-wide strategic skills body for the creative industries, as high quality and offering relevant industry skills. Overall, 94 accredited degrees and diplomas were offered by 37 academic institutions in 2013/14, including the network of Creative Skillset film academies: London Film School, National Film and Television School, and Screen Academy Scotland, which had 173, 170 and 59 students respectively. These academies have been identified by the UK film industry as centres of excellence in film education and training.

16.3 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 BFI Film Academy programme, supported now by the Department for Education in England, National Lottery, Creative Scotland and Northern Ireland Screen, which was designed to help 16-19 year olds develop their skills and build careers in the film industry.

Over its first two years the Academy has provided opportunities for talented young people from a range of backgrounds to learn about all aspects of filmmaking - from writing and direction to editing and sound design – through network (evening and weekend) and residential programmes. Courses were delivered through partner organisations across the UK and with industry bodies like BAFTA, Creative Skillset and Pinewood Studios. In 2013/14 the Academy worked with 39 delivery partners reaching 720 young people on network courses (Table 16.7) and a further 100 young people on residential courses. Across all courses in 2013/14, 31% of participants were from Black and minority ethnic backgrounds and 9% were disabled.

Table 16.7 BFI Film Academy participants, network courses, 2012/13 and 2013/14

Nation/region	2012/13	2013/14
England	425	552
North East	34	42
Yorkshire and The Humber	27	31
North West	49	57
West Midlands	28	30
East Midlands	34	36
East of England	49	66
London	95	146
South East	52	74
South West	57	70
Wales	–	49
Scotland	–	56
Northern Ireland	–	63
Total	**425**	**720**

Source BFI

16.4 Other film education activity

In addition to the activity described above, there are a number of 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 and training providers. Research is currently being conducted into a range of issues around this subject including the interaction between audiences, learning and technology, the scope of existing provision around learning based activity in film and media with children and young people, and the range of activity being delivered.

The BFI continues to run programmes for learners of all ages at BFI Southbank. Table 16.8 provides details of some of the BFI's main education activities.

In 2012/13 there were 38,473 admissions to BFI Southbank education events, an increase from 37,000 admissions in 2011/12 and up 96% on 2004/05. There were 4,890 education admissions to BFI festivals – down from 5,000 on 2011/12, and 10% lower than in 2004/05. The number of visits to the BFI Reuben Library increased substantially from 11,905 in 2011/12 to 62,000 in 2012/13, due in large part to its relocation from Stephen Street to BFI Southbank. Information enquiries decreased by nearly 38%, from 3,971 in the previous year to 1,743.

BFI Screenonline is a web-based encyclopaedia of British film and television featuring hundreds of hours of clips from the BFI National Archive, supplemented by contextual material, stills, posters and press books. Users in UK schools, colleges, universities and libraries can access the entire site for free; in 2012/13 there were 49,900 video streaming requests.

Table 16.8 BFI education activities, 2004-2013

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	% change 2011/12-2012/13
BFI Southbank education event admissions	19,625	15,149	12,648	33,945	30,999	32,954	38,707	37,000	38,473	4.0
BFI festivals – education admissions	5,451	4,881	4,106	3,733	5,698	5,615	4,825	5,000	4,890	-2.2
BFI Reuben Library visits	–	12,331	11,919	11,905	12,024	10,969	10,983	11,900	62,000	421.0
BFI information service enquiries	–	27,044	25,655	25,711	19,539	29,341	18,444	3,971	1,743	-56.1
BFI Screenonline video streaming requests	–	–	–	–	172,142	115,194	92,020	80,000	49,853	-37.7

Source: BFI

- For more information on the film education providers described in this chapter, please see the following links:
  www.bfi.org.uk/education-research
  www.intofilm.org
  www.creativeskillset.org
  www.screenonline.org.uk
- For more information on public investment in film in the UK see Chapter 19, (page 204)

Chapter 17

Film, high-end television and animation production in 2013

The value of feature film production spend in the UK reached £1.1 billion in 2013, 81% of which was associated with inward investment features. The value of qualifying UK high-end television and animation production in 2013/14 was almost £450 million, 52% of which was associated with inward investment projects.

FACTS IN FOCUS:

Total UK film production activity in 2013 was £1,069 million, compared with £994 million in 2012.

A total of 241 features were produced: 167 UK domestic features, 37 co-productions and 37 inward investment features.

The UK spend associated with inward investment features was £860 million, up 28% from £671 million in 2012.

Sixteen big budget films accounted for 72% of the total UK production spend.

In the first full year of the new high-end television and animation programme tax reliefs, UK production activity was £395 million and £52 million, respectively.

17.1 The value of UK film production

The aggregate UK spend of features that commenced principal photography in 2013 was £1,069 million. This was up 7.5% from £994 million in 2012, but below 2011's record figure of £1,321 million (Figure 17.1). (The data in this chapter differ from those in Chapter 18 which analyses UK films based on year of certification.)

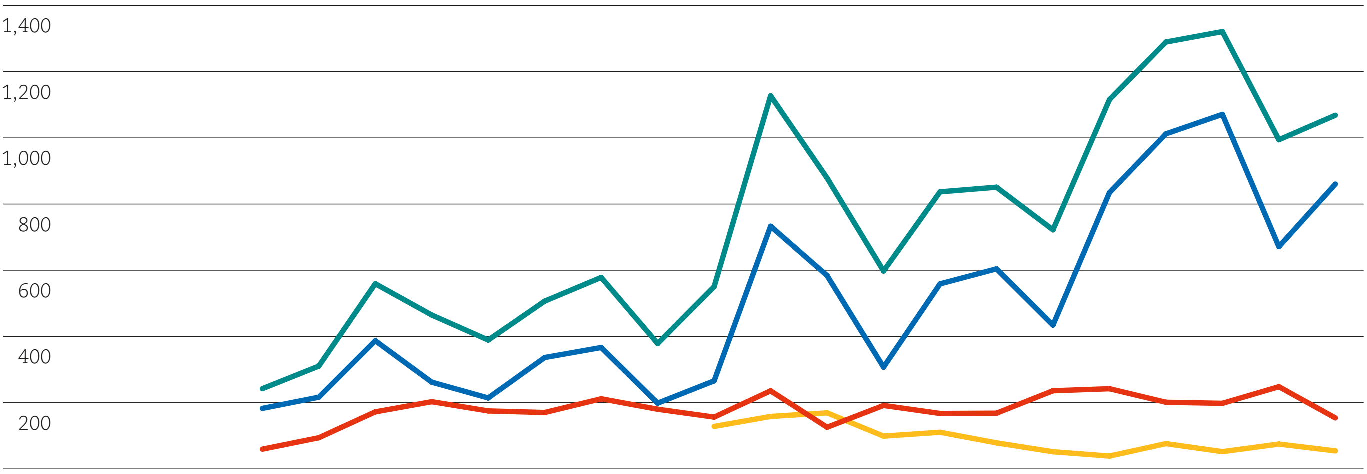
Inward investment films contributed £860 million (81%) towards the total UK production spend in 2013, up £189 million (28%) from 2012. Some of the big budget films contributing to this figure were *Far from the Madding Crowd, Good People, The Gunmen* and *Vampire Academy: Blood Sisters.*

Domestic UK features, including *A Little Chaos, The Long Goodbye, Our Robot Overlords* and *Pride* spent £154 million in the UK, a fall of £90 million (38%) from 2012 – the lowest figure since 2004. This is due to a fall in domestic films made by UK companies but financed by US studios. Expenditure on independent domestic UK films increased from £134 million to £150 million. Official and unofficial co-productions contributed £54 million, down from £75 million in 2012. These included *Christina Noble, Humshakals, Jimmy's Hall, Mr. Turner* and *Trash.*

According to IHS, the UK is ranked third in the world in terms of the value of feature film production behind the USA and Japan.

Figure 17.1 also shows that since 1994, both the growth and annual variation in the total value of UK spend has principally been driven by inward investment and how it fluctuates from year to year. The UK spend of UK domestic films has been broadly stable over this period, fluctuating around an average of £193 million per year, while there was a decline in co-productions following changes to the UK film tax relief in 2007.

Figure 17.1 UK spend of feature films produced in the UK, 1994-2013, £ million



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Inward investment	183	217	387	262	214	336	367	199	266	733	584	307	559	604	434	835	1,012	1,071	671	860
Domestic UK	60	94	172	203	175	170	212	180	156	236	126	192	167	168	236	242	201	198	248	154
Co-production	–	–	–	–	–	–	–	–	128	158	169	99	111	79	52	39	76	52	75	54
Total	**243**	**311**	**559**	**465**	**389**	**507**	**578**	**379**	**551**	**1,127**	**879**	**598**	**837**	**851**	**722**	**1,115**	**1,290**	**1,321**	**994**	**1,069**

Source: BFI

Notes:
Data are rounded to the nearest £1 million so may not sum exactly to the totals shown.
Films are allocated to the calendar year in which principal photography commenced.
Films with budgets under £500,000 are included in this analysis after 2008.
Numbers have been revised on the basis of new information received since publication of the 2013 Yearbook.
Inward investment feature films include inward co-production and VFX-only films.

Measurement:
The above numbers include only the UK spend associated with productions shot or post-produced in whole or in part 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.

Table 17.1 distinguishes independent UK films from UK/USA studio films and non-UK films made partly or wholly in the UK. In 2013, UK independent films accounted for just under 30% of the production spend in the UK, slightly lower than 31.5% in 2012.

Table 17.1 Value of UK spend of UK/USA studio and independent films, 2004-2013, £ million

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
UK/USA studio films	558.4	236.2	587.6	566.3	409.6	772.1	983.4	1,007.3	672.8	751.5
UK independent films	314.0	356.7	233.9	266.4	288.2	295.6	284.2	270.3	313.4	313.4
Non-UK films	6.2	4.8	15.4	18.2	24.3	47.7	21.9	43.3	8.0	3.7
Total	**878.6**	**597.7**	**836.9**	**850.9**	**722.1**	**1,115.4**	**1,289.5**	**1,321.0**	**994.3**	**1,068.6**
% UK independent film spend	35.7	59.7	27.9	31.3	39.9	26.5	22.0	20.5	31.5	29.3

Source: BFI

See notes to Figure 17.1.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

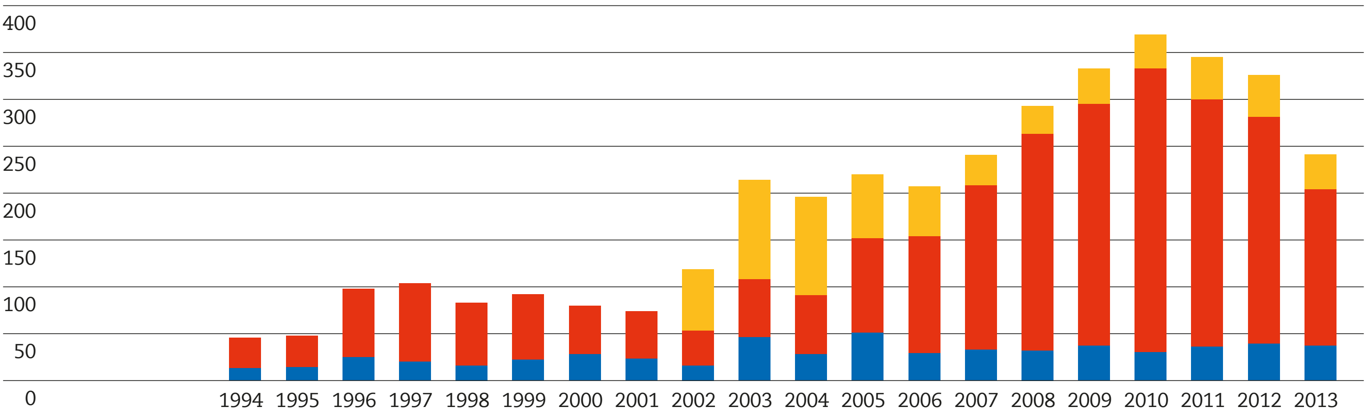
17.2 The volume of UK film production

In 2013, 241 films were produced wholly or in part in the UK, down from 326 in 2012. Of these, 37 were co-productions, 167 were domestic UK features (of which 104 had budgets under £500,000) and 37 were inward investment films (Figure 17.2). The biggest fall was in domestic UK films with budgets under £500,000, from 177 to 104. However, there is often a delay in acquiring full data on low and micro-budget feature film activity in the UK, and the number for 2013 is likely to be revised upwards.

The number of films produced in the UK grew from below 50 in 1994 to a peak of 369 in 2010. From 2008 onwards, the data collected include feature films with budgets of less than £500,000 which partially explains the increase. Prior to 2008 the collection of data on films with this budget was not comprehensive. The number of co-productions fell from 2007 reflecting a tightening in co-production certification requirements followed by the introduction of the new film production tax relief based on a film's UK spend rather than the entirety of the production budget. Minority co-productions saw the greatest reduction.

Figure 17.2 Number of feature films produced in the UK, 1994-2013

Number of features



	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Inward investment	13	14	25	20	16	22	28	23	16	46	28	51	29	33	32	37	30	36	39	37
Domestic UK	33	34	73	84	67	70	52	51	37	62	63	101	125	175	231	258	303	264	242	167
Of which… budget ≥ £500,000	–	–	–	–	–	–	–	–	–	48	40	55	57	72	83	89	78	86	65	63
budget < £500,000	–	–	–	–	–	–	–	–	–	14	23	46	68	103	148	169	225	178	177	104
Co-production	–	–	–	–	–	–	–	–	66	106	105	68	53	33	30	38	36	45	45	37
Of which… majority and parity co-production	–	–	–	–	–	–	–	–	–	21	22	14	20	16	15	13	25	24	24	20
minority co-production	–	–	–	–	–	–	–	–	–	85	83	54	33	17	15	25	11	21	21	17
Total	**46**	**48**	**98**	**104**	**83**	**92**	**80**	**74**	**119**	**214**	**196**	**220**	**207**	**241**	**293**	**333**	**369**	**345**	**326**	**241**

Source: BFI RSU

Notes:
Inward features include inward investment co-productions from 2002 and a small number of visual effects (VFX) only titles from 2007.
UK co-productions not available by shoot date prior to 2002.
Data for 2003-2012 updated since publication of the 2013 Yearbook.
Inward investment includes a spike in the number of non-USA (mainly Indian) inward investment films in 2005.
Includes both official and unofficial co-productions.
Majority co-production means a co-production in which the UK investment is the largest single national investment (not necessarily an absolute majority).
Parity co-production means a co-production in which the UK and at least one other country contributed equal largest investments.
Minority co-production means a co-production in which at least one other country made a larger investment than the UK.

Table 17.2 shows that UK independent films represented almost 90% of all films produced in the UK in 2013, slightly lower than 93% in 2012. The number of UK/USA studio films (19) was the highest since 2006. These few films account for the majority of UK production spend. Although the number of independent films (216) looks lower than recent years, due to the delay in acquiring full data on low and micro-budget feature film activity, this is likely to be revised upwards over time.

Table 17.2 Numbers of UK/USA studio and independent films, 2004-2013

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
UK/USA studio films	14	15	21	17	14	14	16	13	17	19
UK independent films	177	199	179	212	263	294	346	312	302	216
Non-UK films	5	6	7	12	16	25	7	20	7	6
Total	**196**	**220**	**207**	**241**	**293**	**333**	**369**	**345**	**326**	**241**
% UK independent films	90.3	90.5	86.5	88.0	89.8	88.3	93.8	90.4	92.6	89.6

Source: BFI

Note: Data for 2004-2012 updated since publication of the 2013 Yearbook.

17.3 Productions by genre, 2011-2013

Table 17.3 and Figure 17.3 show a breakdown of production by genre for the years 2011-2013. Drama and documentaries accounted for the highest proportion of films, 19% each, but only 9% and 2% of the UK spend. These genres were followed by comedy and thriller which accounted for 15% and 14% of films respectively, and 10% and 8% of UK spend. The biggest spending genre was action, which accounted for 28% of spend, but only 5% of films.

Table 17.3 Genre of production in the UK, 2011-2013 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Action	48	5.3	1,611.4	30.7	941.4	27.8
Fantasy	13	1.4	678.2	12.9	472.3	14.0
Comedy	136	14.9	432.2	8.2	346.3	10.2
Drama	169	18.5	517.7	9.8	294.2	8.7
Thriller	126	13.8	452.2	8.6	283.3	8.4
Sci-fi	26	2.9	312.5	5.9	265.2	7.8
Horror	81	8.9	295.8	5.6	203.2	6.0
Adventure	14	1.5	242.0	4.6	122.2	3.6
Music/dance	8	0.9	113.6	2.2	100.8	3.0
Biopic	17	1.9	141.1	2.7	94.1	2.8
Documentary	172	18.9	102.4	1.9	65.1	1.9
War	8	0.9	106.0	2.0	57.9	1.7
Family	6	0.7	75.4	1.4	45.4	1.3
Romance	27	3.0	66.7	1.3	36.8	1.1
Crime	41	4.5	39.1	0.7	34.8	1.0
Animation	7	0.8	54.5	1.0	13.8	0.4
Western	4	0.4	13.3	0.3	4.4	0.1
Mystery	9	1.0	2.6	0.0	2.6	0.1
Total	**912**	**100.0**	**5,256.7**	**100.0**	**3,383.8**	**100.0**

Source: BFI

Notes:
The data have been presented for a three-year period to show as many genres as possible without disclosing the budgets of individual films.
These figures do not include VFX-only films.
Percentages may not sum to sum to totals due to rounding.

Figure 17.3 Genre of production of UK films, 2011-2013 (number of films)

	%
Documentary	18.9
Drama	18.5
Comedy	14.9
Thriller	13.8
Horror	8.9
Action	5.3
Crime	4.5
Romance	3.0
Sci-fi	2.9
Other	9.4

Source: BFI

Looking at UK independent films alone over the four-year period (Table 17.4) the pattern was fairly similar. The main differences were that drama, documentary, comedy and thriller accounted for a much greater proportion of UK spend than for all films produced in the UK (56% compared with 29%), and action and fantasy accounted for a lower proportion (15% compared with 42%).

Table 17.4 Independent UK productions by genre, 2011-2013 (ranked by UK spend)

Genre	Number of films	% of total films	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Comedy	128	15.4	249.3	19.4	192.4	21.4
Thriller	117	14.1	214.1	16.7	136.3	15.2
Action	32	3.9	202.3	15.7	126.8	14.1
Drama	163	19.6	169.9	13.2	118.6	13.2
Biopic	16	1.9	129.4	10.1	91.6	10.2
Documentary	163	19.6	82.7	6.4	53.2	5.9
Romance	25	3.0	52.7	4.1	33.7	3.8
Horror	74	8.9	35.0	2.7	30.8	3.4
Sci-fi	22	2.7	35.5	2.8	28.9	3.2
Crime	40	4.8	28.0	2.2	24.3	2.7
Family	4	0.5	13.1	1.0	13.1	1.5
Music/dance	6	0.7	14.9	1.2	12.1	13.6
Adventure	10	1.2	15.7	1.2	11.5	1.3
Fantasy	6	0.7	12.0	0.9	9.4	1.0
Western	4	0.5	13.3	1.0	4.4	0.5
Animation	6	0.7	9.5	0.7	3.8	0.4
War	5	0.6	5.3	0.4	3.7	0.4
Total	**830**	**100.0**	**1,285.4**	**100.0**	**897.2**	**100.0**

Source: BFI

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

17.4 Budget trends

The median budget of domestic UK features was £140,000 in 2013, the same as in 2012 (Table 17.5). The median budget for inward investment features increased in 2013 to £13.7 million, from an unusual low of £3.8 million in 2012, while the median budget of co-productions increased from £1.1 million to £2 million.

Table 17.5 Median feature film budgets, £ million, 2008-2013

Production category	2008	2009	2010	2011	2012	2013
Inward investment	17.20	18.40	16.60	18.80	3.80	13.70
Domestic UK	0.20	0.20	0.13	0.16	0.14	0.14
Co-productions	1.40	1.30	2.70	1.30	1.10	2.00

Source: BFI

Notes:
Median budget is the middle value of budgets when ordered lowest to highest (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 average as it avoids the upward skew of a small number of high budget productions.
Includes films with budgets of less than £500,000.
Data for 2008-2012 updated since publication of the 2013 Yearbook.
Data for domestic UK films are shown to two decimal places to gain a clearer picture of change over the time period.

17.5 Size distribution of budgets

The budget size distribution for the three main categories of films made in 2013 is shown in Tables 17.6 to 17.8.

For inward investment features, the 16 features with budgets of over £30 million (43% of all inward features) accounted for 90% of the total budget for this category. There were 11 inward features with budgets of less than £5 million (30% of inward features), which accounted for 1% of the total budget for these films.

Table 17.6 Size distribution of budgets, inward investment features, 2013

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£30 million	16	1,164.4	89.6
£10 – £29.9 million	5	79.4	6.1
£5 – £9.9 million	5	43.5	3.3
<£5 million	11	12.2	0.9
Total	**37**	**1,299.4**	**100.0**

Source: BFI

Notes:
Figures/percentages may not sum to totals due to rounding.
Does not include VFX-only titles.

The majority of domestic UK features (62%) had budgets under £500,000 and only eight productions (5%) had budgets of over £5 million (Table 17.7). The domestic features in the highest budget band accounted for 42% of this category's aggregate budget while those in the lowest budget band accounted for 9%.

Table 17.7 Size distribution of budgets, domestic UK features, 2013

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	8	72.9	42.2
£2 – £4.9 million	15	43.7	25.3
£0.5 – £1.9 million	40	41.2	23.8
<£0.5 million	104	15.0	8.7
Total	**167**	**172.8**	**100.0**

Source: BFI

Seven out of 37 co-productions produced in 2013 had budgets of over £5 million, accounting for 62% of the total budget in this category (Table 17.8). The seven co-productions with budgets of under £500,000 accounted for 1% of the total budget.

Table 17.8 Size distribution of budgets, co-productions, 2013

Budget band	Number	Total budget in band (£ million)	% of total budget
≥£5 million	9	73.7	62.0
£2 – £4.9 million	11	33.0	27.7
£0.5 – £1.9 million	10	10.8	9.1
<£0.5 million	7	1.4	1.1
Total	**37**	**118.9**	**100.0**

Source: BFI

Percentages may not sum to 100 due to rounding.

17.6 Big budget productions, 2008-2013

The importance to UK spend of a small number of big budget productions – usually inward investment films – is demonstrated in Table 17.9. In 2013, the 16 films with budgets of £30 million or greater accounted for 72% of UK production spend. All these films were inward investment features.

Table 17.9 Big budget films' contribution to UK spend, 2008-2013

	2008	2009	2010	2011	2012	2013
Number of films with budgets ≥£30 million	13	16	13	17	10	16
Value of associated UK spend (£ million)	410.8	748.9	960.6	1,009.8	644.1	769.8
Total UK spend (£ million)	722.1	1,115.4	1,289.5	1,321.0	994.3	1,068.6
Big budget film % of UK spend	56.9	67.1	74.5	76.4	64.8	72.0

Source: BFI

Note: Data for 2008-2012 updated since publication of the 2013 Yearbook.

17.7 UK spend as percentage of total production budget

Table 17.10 shows UK spend as a percentage of the total production budget for inward investment, UK domestic and co-production titles. UK domestic films had the highest proportion of UK spend in 2013 (89%), followed by inward investment films at 66%. Co-productions had the lowest UK spend percentage (46%).

Table 17.10 UK spend as percentage of total production budget, 2008-2013

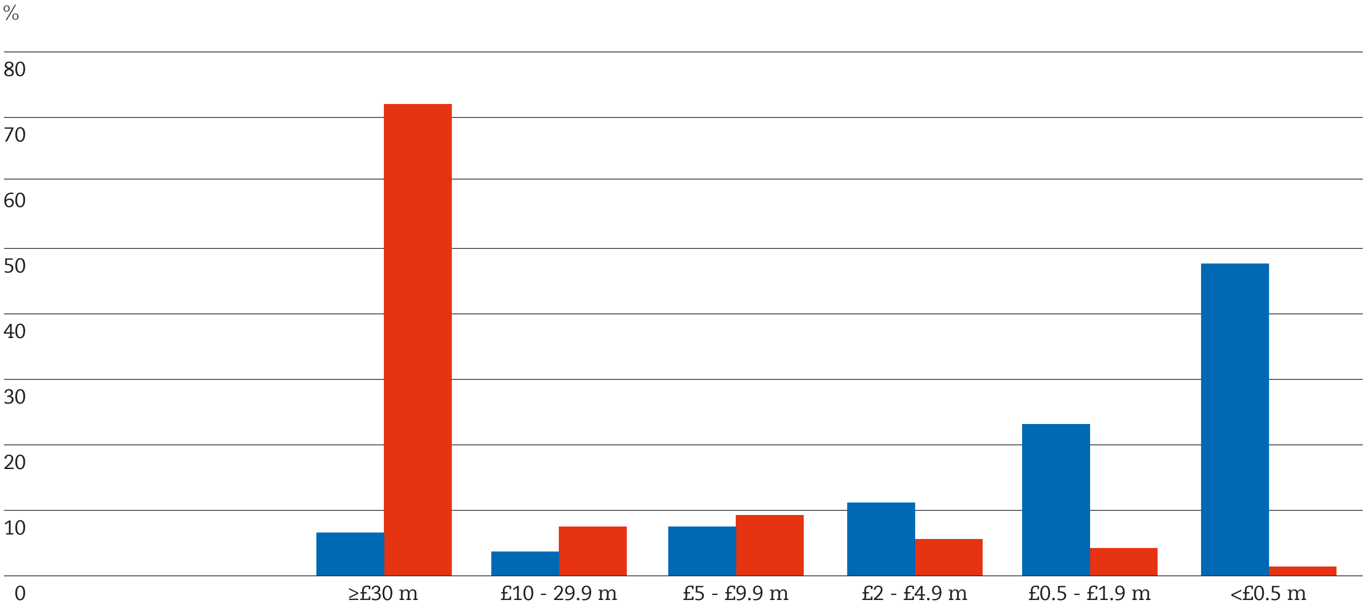
Production category	2008	2009	2010	2011	2012	2013
Inward investment	46.9	50.9	71.7	55.9	71.8	66.2
UK domestic	77.0	81.4	88.9	86.7	89.9	89.1
Co-production	43.5	37.2	41.7	35.8	47.5	45.6

Source: BFI

Notes:
Data for 2008-2012 updated since publication of the 2013 Yearbook.
VFX-only films are not included in the 'inward investment' category.

Figure 17.4 underlines that a small proportion (7%) of titles with a UK spend of £30 million or greater are responsible for the majority (72%) of UK production spend. Conversely, 48% of films have a UK spend of less than £500,000, but they represent just 1% of production investment in the UK.

Figure 17.4 Percentage of productions and UK spend by category of UK spend, 2013



	≥£30 m	£10 - 29.9 m	£5 - £9.9 m	£2 - £4.9 m	£0.5 - £1.9 m	<£0.5 m
% of productions	6.6	3.7	7.5	11.2	23.2	47.7
% of UK spend	72.0	7.5	9.3	5.6	4.2	1.4

Source: BFI

17.8 UK domestic productions by territory of shoot

Table 17.11 analyses UK domestic productions in 2013 according to whether they were wholly shot in the UK, or shot partly or wholly abroad. The majority (126 out of 167) were shot exclusively in the UK, while 40 films were shot partly or wholly outside the UK. The non-UK spend of domestic productions in 2013 as a proportion of budget was 11%.

Table 17.11 UK domestic productions by territory of shoot, 2013

Shooting in...	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	126	103.2	0.4	0.4
UK and other / wholly outside the UK	41	69.5	18.4	26.6
Total UK domestic films	**167**	**172.8**	**18.9**	**10.9**

Source: BFI

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

Table 17.12 shows the number of shoots by territory for UK domestic films. Because some films were shot in two or more territories, the total number of shoots was greater than the total number of films. There were 11 shoots in the USA, four in both Germany and Spain, and three in France.

Table 17.12 UK domestic productions, shoots by territory or region, 2013

Territory of shoot	Number of shoots
UK	156
USA	11
Germany	4
Spain	4
France	3
Poland	2
Republic of Ireland	2
Italy	2
Other Europe	6
Middle East	5
Africa	4
Central Asia	5
South Asia	2
East Asia	2
Argentina	2
Turkey	2
Other	2
Total shoots	**214**

Source: BFI

17.9 Co-production by territory of shoot

In contrast to UK domestic films, co-productions were usually shot partly or wholly abroad, as Table 17.13 shows. Only five out of 37 films, with a total budget of £13.5 million, were shot wholly in the UK. Non-UK spend accounted for 54% of the total budget of co-productions in 2013.

Table 17.13 Co-production by territory of shoot, 2013

Shooting in…	Number of films	Budget (£ million)	Non-UK spend (£ million)	Non-UK spend as % of total budget
UK only	5	13.5	2.3	16.9
UK and other	12	53.7	28.8	53.7
Other only	20	51.7	33.5	64.9
Total co-production	**37**	**118.9**	**64.7**	**54.4**

Source: BFI

Notes:
Includes both official and unofficial co-productions.
Percentages calculated on unrounded data.

The country distribution of co-production shoots is shown in Table 17.14. As most co-productions were shot in two or more territories, the total number of shoots was greater than the total number of films. The majority of shoots were in the UK or elsewhere in Europe. Of the non-European shoots, East and South Asia accounted for four, the USA and South Africa accounted for three each, and Brazil and New Zealand for two each.

Table 17.14 Co-production, shoots by territory or region, 2013

Country	Number of shoots
UK	17
Republic of Ireland	5
USA	3
South Africa	3
Italy	3
Brazil	2
Hungary	2
France	2
Germany	2
New Zealand	2
East and South Asia	4
Other Europe	7
Other	4
Total shoots	**56**

Source: BFI

Notes:
Includes both official and unofficial co-productions.
Percentages calculated on unrounded data.

17.10 Production company activity levels

UK film production in 2013 was dispersed among a large number of production companies, as shown in Table 17.15. The BFI Research and Statistics Unit recorded 420 production companies associated with films shot in the UK or co-productions involving the UK in the year, an increase from 392 in 2012. Of these, 392 (93%) were associated with a single feature. These were a mixture of distinct production companies and special purpose vehicles set up to make a single film.

Table 17.15 Film production company activity, 2013

Number of features per company	Number of companies
6	1
5	0
4	4
3	5
2	18
1	392
Total	**420**

Source: BFI RSU

Note: Includes all production categories.

17.11 The value of high-end television production

In 2013, the UK government introduced tax reliefs for high-end television (HETV) and animation programmes. As these reliefs first came into force on 1 April 2013, we are reporting statistics on their implementation for the financial year 2013/14. (Animation programmes statistics are outlined in section 17.14.)

Table 17.16 shows that total UK spend on qualifying HETV produced in the UK between April 2013 and March 2014 was £395 million. Of this, 57% (£225 million) was attributed to inward investment productions, covering 13 HETV projects, including *Game of Thrones Series 4* (10 episodes), *24: Live Another Day* (12 episodes) and *Outlander* (16 episodes). The UK spend of domestic UK and co-production HETV programmes was £170 million (43%) covering 30 projects including *Atlantis* (13 episodes), *Critical* (13 episodes) *and Call the Midwife* (8 episodes).

Table 17.16 UK spend and number of high-end television productions produced in the UK, April 2013-March 2014

<table>
<tr><th>Production Category</th><th>UK spend £ million</th><th>Number of productions*</th></tr>
<tr><td>Inward investment</td><td>224.7</td><td>13</td></tr>
<tr><td>Domestic UK</td><td rowspan="2">170.0</td><td>27</td></tr>
<tr><td>Co-production</td><td>3</td></tr>
<tr><td>Total</td><td>394.8</td><td>43</td></tr>
</table>

Source: BFI RSU

Notes:
* A high-end television production can be a single programme or a television series.
Figures may not sum to totals due to rounding.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

17.12 Genre of high-end television production

Table 17.17 shows a breakdown of qualifying HETV productions by genre. The most common genre was drama, accounting for 18 productions (42% of total) and £160 million (41%) of UK spend. The second was crime, accounting for six productions and 13% of UK spend.

Table 17.17 Genre of high-end television production*, April 2013-March 2014

Genre	Number of productions	% of total productions	Budget (£ million)	% of total budget	UK spend (£ million)	% of total UK spend
Drama	18	41.9	181.2	40.0	160.3	40.6
Crime	6	14.0	65.4	14.4	53.1	13.4
Comedy	4	9.3	13.3	2.9	12.4	3.1
Thriller	4	9.3	66.7	14.7	54.9	13.9
Other	11	25.6	126.7	28.0	114.1	28.9
Total	**43**	**100.0**	**453.3**	**100.0**	**394.8**	**100.0**

Source: BFI RSU

Notes:
* A high-end television production can be a single programme or a television series.
The data in this table show the primary genre assigned by the BFI Research and Statistics Unit.
Percentages may not sum to totals due to rounding.

17.13 The value of animation production

Table 17.18 shows that the total UK spend of the 25 qualifying animation projects produced in the UK between April 2013 and March 2014 was £52 million. In contrast to film and HETV production, only 15% of this was attributed to inward investment. Three fifths of these productions (15 of 25) were aimed at children.

Table 17.18 UK spend and number of animation programmes produced in the UK, April 2013-March 2014

<table>
<tr><th>Production Category</th><th>UK spend £ million</th><th>Number of productions*</th></tr>
<tr><td>Inward investment</td><td>7.8</td><td>4</td></tr>
<tr><td>Domestic UK</td><td rowspan="2">43.9</td><td>19</td></tr>
<tr><td>Co-production</td><td>2</td></tr>
<tr><td>Total</td><td>51.7</td><td>25</td></tr>
</table>

Source: BFI

* An animation production can be a single programme or a television series.

- For more on British film, high-end television and animation certification see Chapter 18 (page 193)
- For more on UK film companies see Chapter 20 (page 212)
- For more about employment in the film production sector see Chapter 22 (page 22)
- For more about the UK film economy see Chapter 21 (page 220)

Chapter 18

Film, high-end television and animation productions certified as British

In 2013, 199 films, with a total production value of £1.2 billion, were certified as British. In addition, 13 high-end television productions and three animation productions with a combined budget of £65 million received final certification in the first full year of the new government tax reliefs for the creative sector.

FACTS IN FOCUS:

A total of 199 UK films (200 in 2012) received final certification as British in 2013. Of these, 182 were films which passed the cultural test and 17 were official co-productions.

The total production budget of finally certified cultural test films was £1,353 million in 2013 (£1,170 million in 2012); the total budget of finally certified co-productions was £113 million (£73 million in 2012).

Sixteen cultural test films had budgets of over £10 million (14 in 2012) and four co-productions had budgets of over £10 million (two in 2012).

In 2013/14, 13 high-end television productions received final certification and 32 received interim approval; three animation productions received final certification and 27 received interim approval.

18.1 Qualifying as an official British film

To access UK film tax relief, a film must be certified as British. To qualify as British, a film must either pass the cultural test 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 is currently being revised to allow for content within the European Economic Area (EEA), additional points for work taking place in the UK and to bring it in line with the new reliefs outlined below. Before 2007, films which were not certified as co-productions had to pass a production costs test to be certified as British.

The Secretary of State for Culture, Media and Sport is responsible for approving the issuing of British Film Certificates on the basis of recommendations made by the BFI Certification Unit. An 'interim approval' may be granted before its completion, to a film which meets the certification criteria, and 'final certification' is awarded once the film has been completed and final documents submitted.

To qualify as a British film under the current cultural test, films have to achieve a requisite number of points based on the British cultural elements for content, contribution, hubs and practitioners (see the links at the end of the chapter for details of the cultural test). A wide range of films qualified as British under the cultural test in 2013, including *The Dark Knight Rises, Ginger and Rosa, Le Week-End* and *Les Misérables*.

To qualify as British under one of the UK's official co-production agreements, films must be jointly certified by the competent authorities in each co-producing country. Each party co-producer is required to meet the certifying criteria of the specific co-production agreement, which include the creative, artistic, technical 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 on the same basis as national films in that territory. British films certified as official co-productions are not required to pass the cultural test. Films which received final co-production certification in 2013 include *Byzantium, I Give It a Year, The Railway Man* and *Pride*.

At the end of 2013, the UK had 10 active bilateral treaties in place, with Australia, Canada, France, India, Israel, Jamaica, Morocco, New Zealand, the Occupied Palestinian Territories and South Africa. In 2013 an agreement with Brazil was signed and in 2014 an agreement with China was signed, but both are subject to constitutional procedures and ratification before they can come into force. 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.

18.2 Qualifying as an official British high-end television or animation programme

In 2013, the UK government introduced tax reliefs for high-end television (HETV) and animation programmes with the aim of boosting production investment in the creative sector. As these reliefs first came into force on 1 April 2013, we are reporting statistics on their implementation for the financial year 2013/14.

Similarly to qualification as a British film, HETV or animation projects must either pass a cultural test (under Schedule 16 of the Finance Act 2013) or be certified as an official co-production under one of the UK's bilateral co-production agreements which allow television co-production. In 2013/14 these were with Australia, Canada, Israel, New Zealand and the Occupied Palestinian Territories.

In 2013/14, HETV projects with final certification included *The Tunnel* and *Call the Midwife*; finally certified animation projects included *The Clangers* and *Sarah and Duck*. No HETV or animation co-productions received final certification in this period.

18.3 Film cultural test certifications, 2012 and 2013

In 2013, a total of 182 films (187 in 2012) received final certification as British under the cultural test (Table 18.1). Although fewer films received final certification than in 2012, the total budget was greater, increasing from £1,170 million to £1,353 million. The number of interim cultural test approvals increased in 2013 compared with 2012, from 154 to 190, and the anticipated total production value rose from £1,343 million to £1,731 million.

Table 18.1 Film cultural test certifications, 2012 and 2013

	2012		2013	
Type of certification	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	154	1,342.5	190	1,730.8
Final certification	187	1,169.7	182	1,353.3

Source: DCMS, BFI

18.4 Film co-production certifications, 2012 and 2013

In 2013, with 17 final certifications and 19 interim approvals, the number of official co-productions was higher than in 2012. The total budget for final certifications was also higher than in 2012 (£73 million in 2012 and £113 million in 2013), but the anticipated production value of interim approvals was lower (£139 million in 2012 and £117 million in 2013).

Table 18.2 Film co-production certifications, 2012 and 2013

	2012		2013	
Type of certification	Number	Budget (£ million)	Number	Budget (£ million)
Interim approval	18	138.7	19	116.6
Final certification	13	73.4	17	112.7

Source: DCMS, BFI

In 2013, 12 of the 17 final co-production certifications were under the European Convention on Cinematic Co-production (one of which was jointly under the UK-South Africa treaty), four were under the UK-Canada agreement and one was under the UK-Australia agreement.

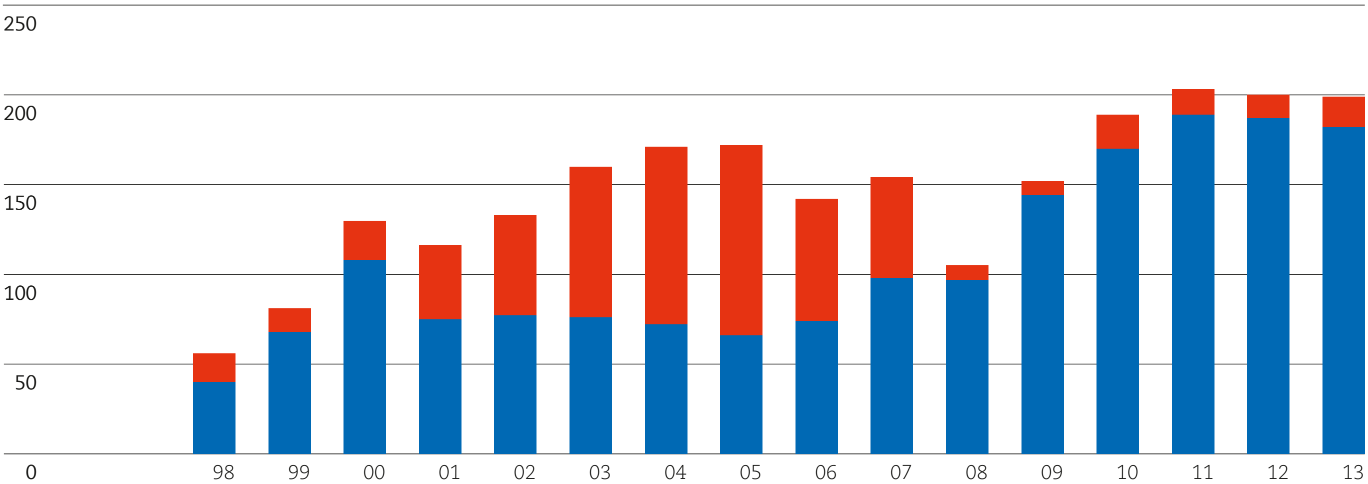
Of the 19 interim co-production certifications, 15 were under the European Convention, two were under the UK-New Zealand agreement, one was under the UK-Canada agreement and one was under the UK-South Africa agreement.

18.5 Films with final certification, 1998-2013

Due in part to a competitive tax regime, the number of UK films (cultural test/production costs test and co-productions) receiving final certification has risen sharply in the past few years. The high figures of 2010 to 2013 (between 189 and 203) contrast sharply with the low totals of 1998 (56) and 1999 (81). As Figure 18.1 shows, in the first half of the 2000s the number of cultural test/production costs test films remained fairly constant while co-productions increased to become the dominant financing model for production. The decline in co-production numbers since then has been influenced by the government's closing of tax loopholes and the redesign of the post-2006 tax relief to accrue more benefit to the UK economy (see below).

Figure 18.1 Number of films with final certification, 1998-2013

Number of final certifications



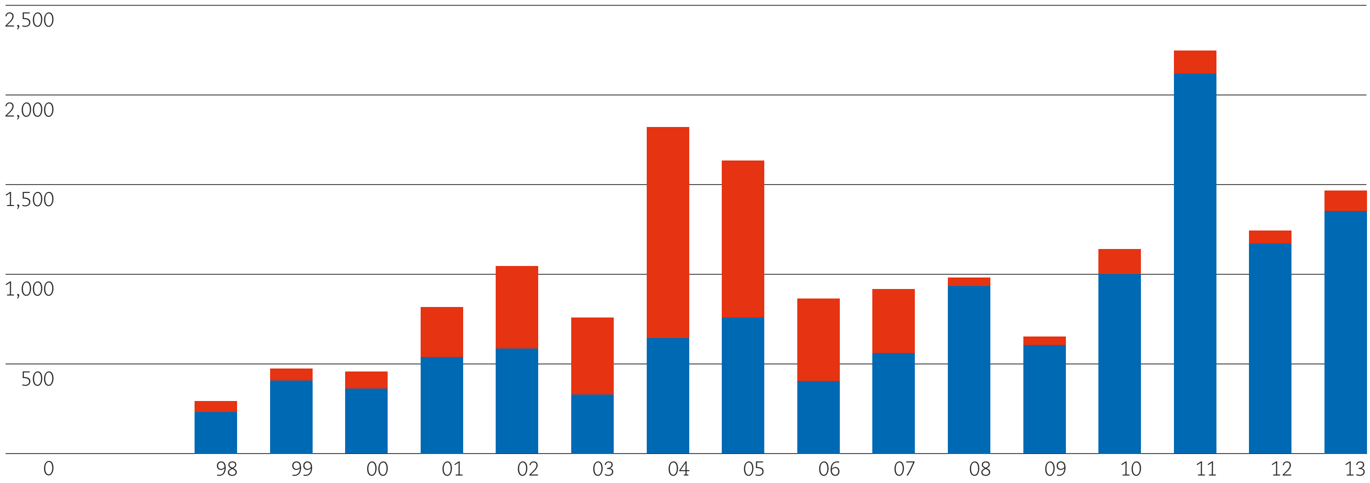
	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13
Cultural Test/Production Costs Test	40	68	108	75	77	76	72	66	74	98	97	144	170	189	187	182
Co-production	16	13	22	41	56	84	99	106	68	56	8	8	19	14	13	17
Total	**56**	**81**	**130**	**116**	**133**	**160**	**171**	**172**	**142**	**154**	**105**	**152**	**189**	**203**	**200**	**199**

Source: DCMS, BFI

The total production budget of British films receiving final certification in 2013, at £1,466 million, was higher than in 2012 (£1,243 million) but lower than 2011's record high of £2,250 million (Figure 18.2). Before 2011, the previous highest aggregate budget was £1,822 million in 2004, which was the highpoint (in terms of value) of the surge in official UK co-productions in the early 2000s. Over 92% of the total budget was accounted for by cultural test films in 2013. The value of official co-productions in 2008 was similar to the level in 1998-2000; from 2008 to 2010 the aggregate budget increased slightly to £137 million, then decreased to £74 million in 2012, followed by an increase in 2013 to £113 million.

Figure 18.2 Total production budget of films with final certification, 1998-2013

Total production budget (£ million)



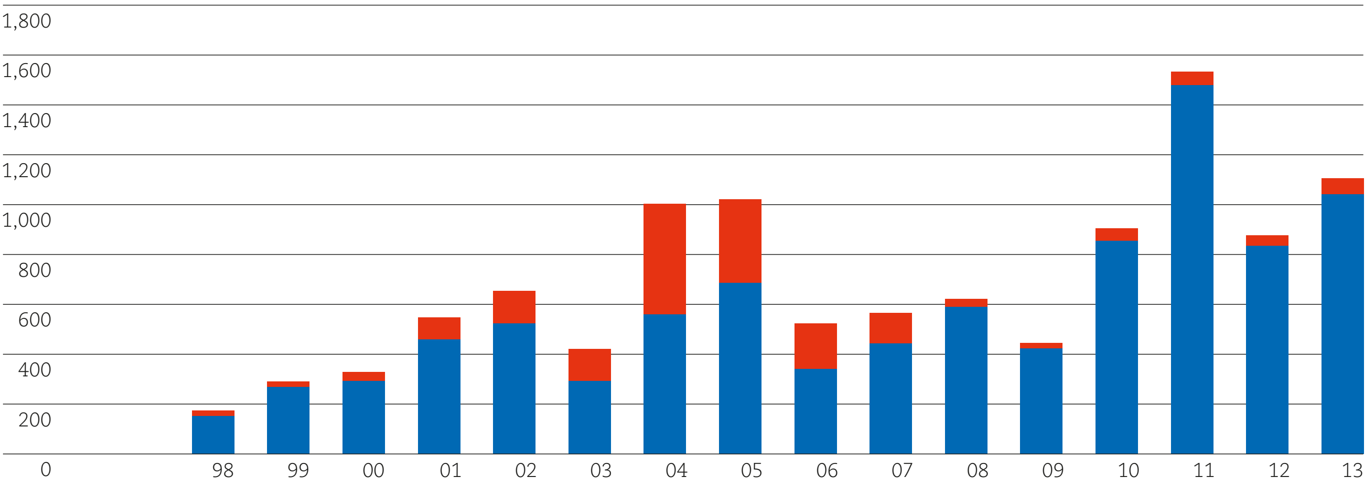
	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13
Cultural Test/Production Costs Test	232	408	361	539	585	330	644	758	402	561	935	605	1,002	2,118	1,170	1,353
Co-production	60	66	96	278	462	428	1,178	877	460	357	45	48	137	131	74	113
Total	**292**	**474**	**457**	**816**	**1,048**	**758**	**1,822**	**1,635**	**862**	**918**	**980**	**653**	**1,139**	**2,250**	**1,243**	**1,466**

Source: DCMS, BFI

Notes:
Total production budget is the sum of production activity in the UK and production activity outside the UK for cultural test/production costs test films and total investment for co-productions.
Figures may not sum to totals due to rounding.

Figure 18.3 shows the levels of UK spend between 1998 and 2013. UK spend is generally that part of the production budget spent in the UK (see notes to Figure 18.3). As with aggregate budgets, 2011 saw a record total of UK spend (£1,534 million), with 2013 being the second highest at £1,107 million (up from £879 million in 2012). The previous peak of UK spend was in 2004 and 2005 when well over half the total production budget was contributed by co-productions. However, the UK spend of co-productions has always been less than that of cultural test/production costs test films. In 2013, cultural test films accounted for 94% of the UK spend of finally certified films.

Figure 18.3 UK spend of films with final certification, 1998-2013



	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13
Cultural Test/Production Costs Test	151	269	292	459	523	293	560	685	341	442	589	423	854	1,479	834	1,041
Co-production	23	22	38	88	132	127	443	337	183	123	34	22	51	55	44	65
Total	**174**	**291**	**330**	**548**	**655**	**421**	**1,003**	**1,023**	**524**	**566**	**623**	**445**	**905**	**1,534**	**879**	**1,107**

Source: DCMS, BFI

Notes:
'UK spend' is the 'value of the production activities in the UK' for cultural test/production costs 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.
Figures may not sum to totals due to rounding.

UK spend as a percentage of total budget is typically lower for co-productions than for cultural test/production costs test films (Table 18.3). At the beginning of the period the co-production UK spend share was usually around one third, although it was as high as 75% in 2008 and 45% in 2009 when the number of co-productions was particularly small. UK spend has been relatively high in the last few years: 42% in 2011, increasing to just over 60% in 2012 and falling slightly to 58% in 2013. The annual UK spend share of cultural test/production costs test films has ranged from 63% to 91%, and in 2013 was 77%.

Table 18.3 UK spend as % of total film production budget for British film, 1998-2013

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Cultural Test/ Production Costs Test	65	66	81	85	89	89	87	91	85	79	63	70	85	70	71	77
Co-production	39	33	40	32	29	30	38	39	40	35	75	45	37	42	60	58
Total	**60**	**61**	**72**	**67**	**63**	**56**	**55**	**63**	**61**	**62**	**64**	**68**	**80**	**68**	**71**	**76**

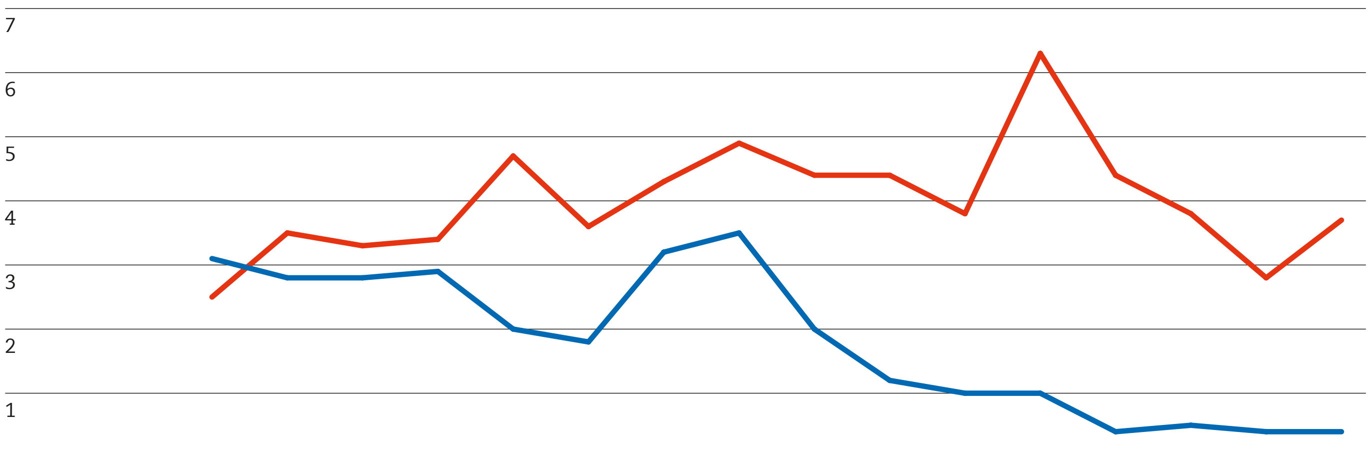
Source: BFI

18.6 Budget distribution of films with final certification, 1998-2013

Median budgets for films with final certification are shown in Figure 18.4. From 1998 to 2005 the median budget for co-productions was on a rising trend, increasing to £4.9 million. This was followed by a drop to £3.8 million in 2006-2008 then a steep rise in 2009 to £6.3 million. The sharp rise in the median budget for 2009 is likely to be partly due to the very low numbers of films certified in that year, as with low numbers the median is more susceptible to the effects of individual budgets. Median budgets fell again in 2010, 2011 and 2012 to £4.4 million, £3.8 million and £2.8 million respectively, but increased in 2013 to £3.7 million.

From 1998 to 2001, the median budget of production costs test films was around £3 million. This dipped in 2002 and 2003 to around £2 million, but then rose to over £3 million in 2004 and 2005. Since then, as the number of cultural test films has increased, the median budget has gradually fallen to £1 million in 2008 and 2009 and to £0.4 million in 2012 and 2013.

Figure 18.4 Median budgets of films with final certification, 1998-2013



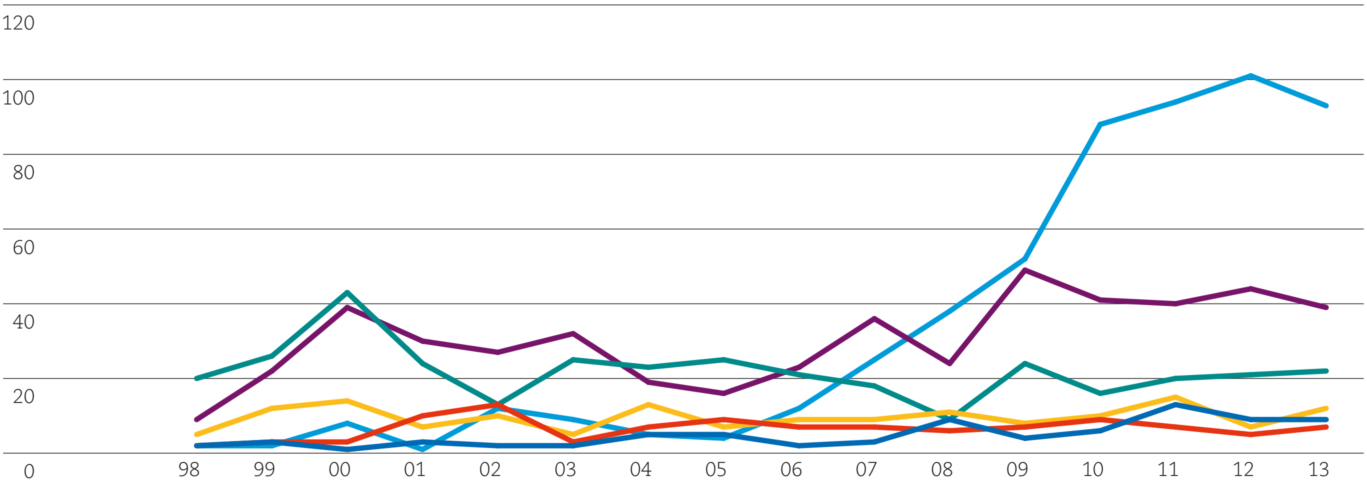
	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13
Cultural Test/Production Costs Test	3.1	2.8	2.8	2.9	2.0	1.8	3.2	3.5	2.0	1.2	1.0	1.0	0.4	0.5	0.4	0.4
Co-production	2.5	3.5	3.3	3.4	4.7	3.6	4.3	4.9	4.4	4.4	3.8	6.3	4.4	3.8	2.8	3.7

Source: BFI

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

Figure 18.5 shows that one reason for the decrease in the cultural test/production costs test median budget is the growth in the number of very low budget (under £2 million) films being awarded final certification. This growth has been particularly marked since 2006, suggesting that UK tax relief has become more accessible to low budget filmmakers following the introduction of new rules in 2007. The total number of medium and high budget (over £10 million) films with final certification has remained fairly consistent. From 2004 to 2010 there were around 10 to 15 films per year, then the number increased to 20 in 2011 before going back to a more 'typical' 14 and 16 in 2012 and 2013 respectively.

Figure 18.5 Final cultural test/production costs test certifications by budget band, 1998-2013



	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13
≥30	2	3	1	3	2	2	5	5	2	3	9	4	6	13	9	9
10-29.9	2	3	3	10	13	3	7	9	7	7	6	7	9	7	5	7
5-9.9	5	12	14	7	10	5	13	7	9	9	11	8	10	15	7	12
2-4.9	20	26	43	24	13	25	23	25	21	18	9	24	16	20	21	22
0.5-1.9	9	22	39	30	27	32	19	16	23	36	24	49	41	40	44	39
<0.5	2	2	8	1	12	9	5	4	12	25	38	52	88	94	101	93
Total	**40**	**68**	**108**	**75**	**77**	**76**	**72**	**66**	**74**	**98**	**97**	**144**	**170**	**189**	**187**	**182**

Source: DCMS, BFI

Table 18.4 shows the distribution of cultural test budgets by budget band for all films certified in the years 2007 to 2013. The 5% of films with budgets of £30 million or over accounted for 74% of the aggregate budget, while the 72% of films with budgets under £2 million accounted for only 5% of the aggregate budget. This reflects both the growth in the number of low budget cultural test films and of big budget inward investment UK/USA titles in the top budget band.

Table 18.4 Final cultural test certifications, budget distribution by budget band, 2007-2013

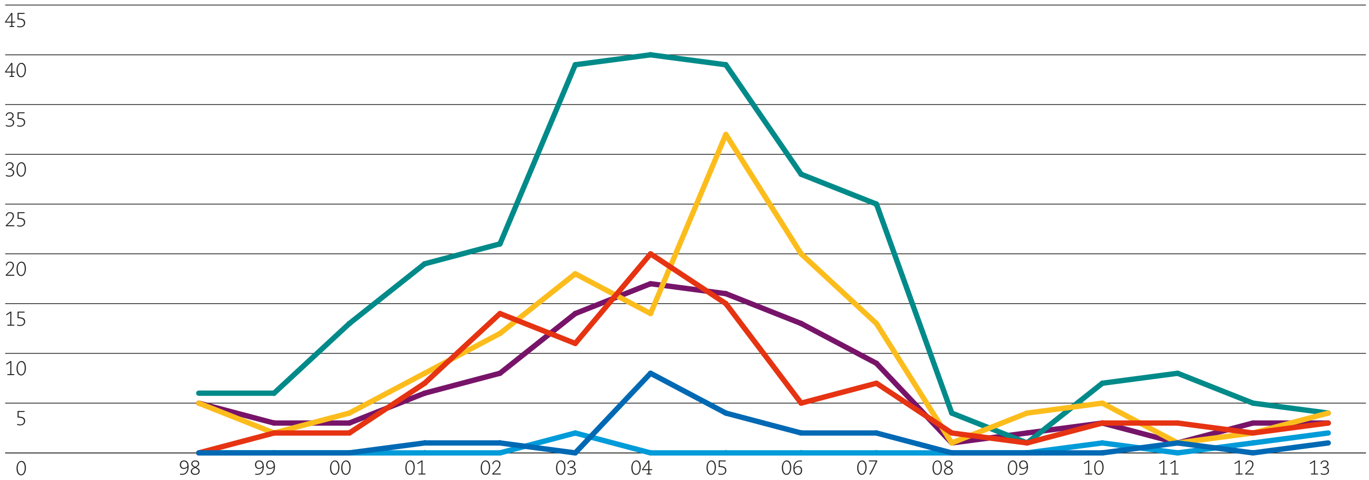
Budget band (£ million)	Number	Total budget (£ million)	% number	% budget
≥30	53	5,694.2	5.0	73.5
10 – 29.9	48	763.3	4.5	9.9
5 – 9.9	72	512.5	6.7	6.6
2 – 4.9	130	408.0	12.2	5.3
0.5 – 1.9	273	280.4	25.6	3.6
<0.5	491	86.0	46.0	1.1
Total	**1,067**	**7,744.4**	**100.0**	**100.0**

Source: DCMS, BFI

For co-productions the pattern is different. The rise and fall in co-production numbers is clear from Figure 18.6, which also shows a disproportionate increase in high budget co-production certifications in 2004-2005. This reflects the structuring of some high budget UK/USA inward investment films as co-productions at that time, a practice that has fallen away since the tax rules changed.

Figure 18.6 Final co-production certifications for film by budget band, 1998-2013

Number of films



	98	99	00	01	02	03	04	05	06	07	08	09	10	11	12	13
≥30	–	–	–	1	1	–	8	4	2	2	–	–	–	1	–	1
10-29.9	–	2	2	7	14	11	20	15	5	7	2	1	3	3	2	3
5-9.9	5	2	4	8	12	18	14	32	20	13	1	4	5	1	2	4
2-4.9	6	6	13	19	21	39	40	39	28	25	4	1	7	8	5	4
0.5-1.9	5	3	3	6	8	14	17	16	13	9	1	2	3	1	3	3
<0.5	–	–	–	–	–	2	–	–	–	–	–	–	1	–	1	2
Total	**16**	**13**	**22**	**41**	**56**	**84**	**99**	**106**	**68**	**56**	**8**	**8**	**19**	**14**	**13**	**17**

Source: DCMS, BFI

The budget distribution for co-productions certified between 2007 and 2013 was much more even than for cultural test films, with nearly 81% of films having budgets between £2 million and £30 million, accounting for 96% of the total budget, as shown in Table 18.7.

Table 18.7 Final co-production certifications for film budget distribution by budget band, 2007-2013

Budget band (£ million)	Number	Total budget (£ million)	% number	% budget
≥30	4	150.3	3.0	16.6
10 – 29.9	21	315.8	15.6	34.9
5 – 9.9	30	221.7	22.2	24.5
2 – 4.9	54	184.2	40.0	20.4
0.5 – 1.9	22	31.9	16.3	3.5
<0.5	4	1.0	3.0	0.1
Total	**135**	**904.8**	**100.0**	**100.0**

Source: DCMS, BFI

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

18.7 High-end television programme certifications, 2013/14

As the new tax reliefs for HETV programmes and animation programmes came into effect in April 2013, our data on certifications is presented for the financial year 2013/14 to give a more rounded impression of their first year of implementation.

In 2013/14, a total of 13 HETV programmes received final certification as British under the relevant cultural test (Table 18.8). The total budget was £64 million, all of which was attributed to UK spend. The number of interim cultural test approvals issued in the same period was 29, with a combined budget of £281 million and an anticipated UK spend of £254 million (90% of total budget).

No co-productions received final certification in this period but three interim approvals were issued. The total budget of these productions was £27 million and the anticipated UK spend was £19 million (71% of total budget).

The median budget for HETV programmes with final certification was £2.3 million.

Table 18.8 High-end television programme certifications, 2013/14

Type of certification	Number	UK spend (£ million)	Total budget (£ million)	UK spend as % of budget
Interim (cultural test)	29	252.4	281.4	89.7
Interim (co-production)	3	19.0	26.7	71.1
Total interim	**32**	**271.4**	**308.1**	**88.1**
Final (cultural test)	13	63.8	63.8	100.0

Source: DCMS, BFI

18.8 Animation programme certifications, 2013/14

Three animation programmes received final certification in 2013/14 under the applicable cultural test (Table 18.9). The combined budget for these programmes was £0.9 million, all of which was attributed to UK spend. A total of 27 interim approvals were awarded in the same period with a combined budget of £67 million and an anticipated UK spend of £58 million (86% of total budget).

No co-productions received either form of certification in 2013/14.

The mean budget for animation programmes with final certification was £0.3 million. (Due to the small number of animation programmes with final certifications, the mean budget is given instead of the median.)

Table 18.9 Animation programme cultural test certifications, 2013/14

Type of certification	Number	UK spend (£ million)	Total budget (£ million)	UK spend as % of total budget
Interim	27	57.9	67.2	86.1
Final	3	0.9	0.9	100.0

Source: DCMS, BFI

- For more on UK film, HETV and animation production, see Chapter 17 (page 178)
- For more on the UK film economy, see Chapter 21 (page 220)
- For more on public investment in film in the UK see Chapter 19 (page 204)

- For more on UK film, HETV and animation production tax reliefs and the relevant cultural tests, see: http://www.bfi.org.uk/film-industry/british-certification-tax-relief
- For more on the European Convention on Cinematographic Co-production, see the Council of Europe website: http://conventions.coe.int (number 147 under the full list of treaties)
- For more on the UK's co-production treaties, see http://www.bfi.org.uk/film-industry/british-certification-tax-relief/co-production

Chapter 19

Public investment in film in the UK

In recognition of the cultural and economic value of film, the UK Government and the European Union provide financial support to film in the UK through a variety of channels. The single biggest source of public funding in 2012/13 was film tax relief, followed by the National Lottery and UK government grant-in-aid.

FACTS IN FOCUS:

Total measured public funding for film in the UK in 2012/13 was £363 million, a decline of just under 1% on 2011/12.

The principal sources of public funding for UK film in 2012/13 were the film production tax relief (57%), the National Lottery (18%) and grant-in-aid (8%) from the Department for Culture, Media, and Sport (DCMS).

Combined grant-in-aid from the DCMS and the national governments in Scotland, Wales, and Northern Ireland totalled 9.5% of all public sector investment.

Film production benefited from 68% of the total financial support followed by education, young people and lifelong learning (8%), and distribution and exhibition (7%).

Support for education, young people and lifelong learning was £32.3 million, up from £19.8 million in 2011/12.

19.1 Public funding for film in the UK by source

Public funding for film identified in Table 19.1 is estimated to have been just over £363 million in the financial year 2012/13, down 0.7% from £366 million in 2011/12. The estimate does not include some types of local authority, research council, higher or further education funding.

The largest source of public funding was the UK film tax relief, which provided £206 million in 2012/13 (57% of the total). This was followed by the National Lottery (£65.4 million, 18% of the total) and grant-in-aid from the Department for Culture, Media, and Sport (DCMS) (£27.9 million, 8% of the total) to the BFI and the National Film and Television School (NFTS). Film4/Channel 4 provided £18.1 million for film production in the UK in 2012/13 and BBC Films/BBC £12.7 million. The European Union (EU) contributed £6.8 million, of which £5.6 million (£5 million in 2011/12) came from the MEDIA Programme.

The year saw a decrease of £13.8 million in DCMS grand-in-aid compared with 2011/12; this was offset by a matching increase in National Lottery investment over the same period.

Figure 19.1 shows the proportion of public funding provided by the main sources.

Table 19.1 Public funding for film in the UK by source, 2012/13

Source	£ million	% of total	Notes
National Lottery Distribution Fund	65.4	18.0	National Lottery allocations to the BFI, Creative Scotland, Film Agency for Wales and Northern Ireland Screen, plus Heritage Lottery Fund
DCMS grant-in-aid to the BFI and NFTS	27.9	7.7	Awards to the BFI and NFTS
Film4/Channel 4[1]	18.1	5.0	Includes Film4's production investment and Channel 4 investment in the NFTS
BBC Films/BBC[2]	12.7	3.5	Includes BBC Films' production investment and BBC investment in the NFTS and film archives
National and Regional Development Agencies	9.4	2.6	Contributions to Screen Agencies from Development Agencies throughout the UK
EU MEDIA Programme[3]	5.6	1.5	
Arts Council England (ACE)[4]	4.3	1.2	Includes ACE National Lottery investments (for example Grants for the Arts) into moving image projects, plus the National Portfolio Organisation investment in FLAMIN/Film London
Welsh Assembly Government	2.2	0.6	Includes spend from all Welsh government agencies into strategic bodies/projects
Northern Ireland Executive	2.1	0.6	Includes spend from all Northern Ireland government agencies into strategic bodies/projects
Scottish Government	2.1	0.6	Includes spend from all Scottish government agencies into strategic bodies/projects
Higher Education Funding Councils (HEFC)[5]	1.6	0.5	Includes support for Creative Skillset film academies, film archives and other strategic agencies[6]
Other EU	1.1	0.3	European Social Fund, European Regional Development Fund
Foreign and Commonwealth Office	1.1	0.3	Funding for UK-originated British Council activity. Excludes partnership funding of 'in-country' events (outside of the UK)
The Office of Communications (Ofcom)	1.1	0.3	Contribution to the costs of BFI archiving of off-air broadcasts

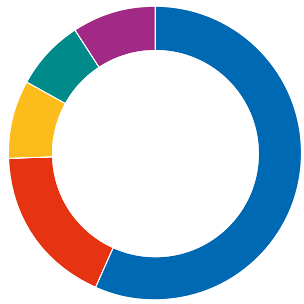
Table 19.1 Public funding for film in the UK by source, 2012/13 (continued)

Source	£ million	% of total	Notes
Department for Business, Innovation & Skills	0.8	0.2	Includes direct investment in the NFTS
Skills Investment Fund training levy	0.8	0.2	Made up of contributions from all film productions either based in the UK or in receipt of UK public funding, collected and re-distributed by Creative Skillset
Local government[7]	0.3	0.1	Investment by local authorities in Regional Film Archives, Creative England and other English Regional Screen Agencies
UK Trade & Investment	0.2	0.1	Funding for export support
Other public sector	<0.1	<0.1	Very small awards (under £10,000) from a range of public sector agencies
Total public sector selective investment[8]	**157.4**	**43.3**	**National Lottery and grant-in-aid from all sources as above**
UK film production tax relief (HMRC)[9]	206.0	56.7	Cost of film tax relief in 2012/13
Total public sector selective and automatic funding	**363.4**	**100.0**	**Sum of all of the above**

Notes:
1. Film4/Channel 4 investments in the calendar year 2013.
2. BBC Films/BBC investments in the calendar year 2013.
3. Investment for the MEDIA Programme is for awards made from 1 April 2012 to 31 March 2013.
4. ACE total does not include other National Portfolio Organisation investments as detailed breakdowns into film and other artforms are not available.
5. Includes the HEFC for England, Wales and Scotland, support and subsidy from higher education institutions.
6. This does not include payments from educational funding councils to film courses (eg film studies) in higher or further education.
7. Does not include local authority direct spending for example on city film offices, support for arts centre cinemas or youth film projects. Only English local authorities reported any funding for film.
8. Does not include transfers to or from reserves or funds carried over from the previous year.
9. Film Tax Relief Monitoring Summary, HMRC, July 2013.

Figure 19.1 Public funding for UK film by source, 2012/13

	%
UK film production tax relief	56.7
National Lottery Distribution Fund	18.0
Film4/Channel 4 and BBC Films/BBC	8.5
DCMS grant-in-aid to the BFI and NFTS	7.7
Other	9.1



Source: BFI

19.2 Spend by agency

As Table 19.2 shows, the largest net spender on film in 2012/13 was HMRC (£206 million for film tax relief), followed by the BFI (£92.6 million), Film4/Channel 4 (£17.9 million), Northern Ireland Screen (£15.2 million) and BBC Films/BBC (£12 million).

Table 19.2 Net film spend by agency, 2012/13[1]

Source	£ million	%
HMRC	206.0	52.5
BFI	92.6	23.6
Film4/Channel 4[2]	17.9	4.6
Northern Ireland Screen	15.2	3.9
BBC Films/BBC[3]	12.0	3.1
NFTS	7.8	2.0
Scottish agencies[4]	6.9	1.8
EU MEDIA Programme	5.5	1.4
Creative England	5.2	1.3
Film London	3.9	1.0
Arts Council England[5]	3.9	1.0
Creative Skillset	3.6	0.9
Welsh agencies[6]	3.3	0.8
FILMCLUB	3.2	0.8
English regional film archives[7]	2.1	0.5
First Light	1.4	0.4
British Council	1.1	0.3
Other English agencies[8]	0.7	0.2
Heritage Lottery Fund	<0.1	<0.1
Total public sector[9]	**392.6**	**100.0**

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.
2. Investment for the calendar year 2013.
3. Investment for the calendar year 2013.
4. Includes film expenditure on the part of Creative Scotland and the Scottish Screen Archive (part of the National Library of Scotland).
5. Includes ACE National Lottery investments (for example from Grants for the Arts) into moving image projects, plus the National Portfolio Organisation (NPO) investment in FLAMIN/Film London. Does not include other NPO investments as detailed breakdowns into film and other artforms are not available.
6. Welsh agencies means Film Agency for Wales, direct spend from the Welsh Assembly Government, and the National Screen and Sound Archive of Wales (part of the National Library of Wales).
7. 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.
8. Includes Northern Film and Media and Screen Yorkshire.
9. 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 (£392.6 million) is higher than total public funding for film in the 2012/13 year (£363.4 million, Table 19.1). Figures and percentages may not sum to totals due to rounding.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

19.3 Activities supported by public spending on film

The areas of activity supported by public spend on film in the UK in 2012/13 are shown in Table 19.3. As in previous years, film production took the largest share, accounting for £267 million (68% of the total). In a change to 2011/12, education, young people and lifelong learning was second (£32 million or 8%, up from £19.8 million on 2011/12). This increase is largely the result of the implementation of the BFI's *Film Forever* strategic plan, one of whose goals is the expansion of opportunities for film education and learning. Distribution and exhibition activity was third with £28 million (7%), followed by film archives and heritage (5%).

Table 19.3 Activities supported by public spend on film, 2012/13

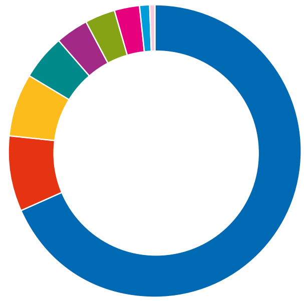
Activity	£ million	% of total
Production[1]	268.7	68.4
Education, young people and lifelong learning[2]	32.3	8.2
Distribution and exhibition	28.1	7.1
Film archives and heritage[3]	19.5	5.0
Administration and services to the public	14.2	3.6
Training and skills[4]	13.5	3.4
Development	10.9	2.8
Export and inward investment promotion[5]	3.8	1.0
Business support[6]	1.6	0.4
Total public film expenditure[7]	**392.6**	**100.0**

Source: BFI

Notes:
1. Non-tax relief production spend in 2012/13 was £61.6 million.
2. FILMCLUB, First Light, education and lifelong learning projects funded and delivered by Creative Scotland, Film Agency Wales, Northern Ireland Screen and ACE. BFI investment in the 5-19 Education Scheme and in its own in-house education activities.
3. BFI National Archive, National/Regional Screen Archives, Heritage Lottery Fund investments.
4. Creative Skillset Skills Investment Fund, National/Regional training investment, Creative Skillset film/craft and technical skills academies.
5. British Film Commission, British Council, locations services in the nations and regions.
6. National/Regional Screen Agency investment: primary beneficiaries are independent production companies.
7. 2012/13 total expenditure (£392.6 million) was greater than total public funding (£363.4 million, Table 19.1) as expenditure was supplemented by earned/self-generated income, grants from trusts and foundations and transfers from reserves.

Figure 19.2 Activities supported by public spending on film, 2012/13

	%
Production	68.4
Education, young people and lifelong learning	8.2
Distribution and exhibition	7.1
Film archives and heritage	5.0
Administration and services to the public	3.6
Training and skills	3.4
Development	2.8
Export and inward investment promotion	1.0
Business support	0.4



Source: BFI

19.4 BFI Lottery awards, 2013

Table 19.4 shows the Lottery awards made by the BFI in 2013. This was the first year of operation for Lottery funding under the BFI *Film Forever* strategic plan. There were 399 awards in total (294 in 2012), with a combined value of £33.3 million.

Table 19.4 BFI Lottery awards, 2013

Source	Number of awards	Total value (£ million)
Film Fund – production	52	13.20
Film Fund – development	163	3.80
Film Fund – completion	7	0.80
Film Fund – pilots	1	0.04
Film Fund – short film	3	0.02
Distribution – Exhibition Fund	28	3.30
Partnerships Lottery		
- Audience Fund	67	9.50
- Film Academy	37	1.60
International Fund	6	0.40
Unlocking Film Heritage	11	0.40
Film Export Fund	24	0.20
Total awards	**399**	**33.30**

Source: BFI

Note: BFI awards data are for calendar year 2013.

The large awards of £250,000+ made by the BFI in 2013 are shown in Table 19.5. There were 21 awards made, of which six were for £1 million or more.

Table 19.5 Large awards (£250,000+) made by BFI, 2013

Source	Project (total = 21)	Amount of award (£)
Film Fund	Bill	1,015,000
	Get Santa	1,000,000
	Jimmy's Hall	1,000,000
	Pride	1,000,000
	Slow West	1,000,000
	Suffragette (aka The Fury)	1,000,000
	X Plus Y	900,000
	Our Robot Overlords	820,000
	The Riot Club (aka Posh)	800,000
	The Falling	750,000
	The Duke of Burgundy	500,000
	Electricity	450,000
	Second Coming	350,000
	Dark Horse	325,000
	Queen and Country	320,000
	Hyena	305,420
	Thomas Quick: The Making of a Serial Killer	300,000
	The Legend of Shorty	250,000
Distribution Fund	All Stars	300,000
	Le Week-End	300,000
	Spike Island	300,000

Source: BFI

Note: BFI awards data are for calendar year 2013.

19.5 Leading public investors in British film production, 2011-2013

Table 19.6 shows the leading public agency and public service broadcaster investment in British films for the calendar years 2011-2013. The most frequent public investors were the BFI/UK Film Council with 92 projects and BBC Films/BBC with 66. These projects had combined budgets of £280 million and £238 million respectively. Third was Film4/Channel 4 with 59 projects with a total combined budget of £180 million. These budget figures are for the total budget of the films, including the share of budget provided by other public investors, private investors and pre-sales.

Table 19.6 Leading public investors in British film production, 2011-2013

Public funder	Number	Estimated budget (£ million)	Examples
BFI/UK Film Council	92	280	Belle, Mr. Turner, Philomena, The Invisible Woman, The Last Days on Mars, The Selfish Giant
BBC Films/BBC	66	238	A Long Way Down, Alan Partridge: Alpha Papa, Far From the Madding Crowd, Pride, Suite Française
Film4/Channel 4	59	180	12 Years a Slave, Ex Machina, Hyde Park on Hudson, The Inbetweeners 2, The Riot Club, Trance
European agencies[1]	33	215	A Most Wanted Man, Big Game, I Anna, The Salvation
Scottish agencies	25	45	Lore, The Railway Man, Starred Up
Irish Film Board	22	50	Byzantium, Calvary, Shadow Dancer
Northern Ireland Screen	15	29	Miss Julie, Our Robot Overlords, Whole Lotta Sole
Welsh agencies	12	10	Bypass, The Machine, The Silent Storm
Northern Film & Media	9	9	I Am Nasrine, The Liability, Song for Marion
Screen Yorkshire	8	15	Catch Me Daddy, Death & Supermarkets, Pulp: A Film About Life, Residue
EM Media[2]	5	2	Entity, Jadoo, The Great Hip Hop Hoax
Film London	5	0.5	Borrowed Time, Lilting
ACE	4	0.4	On Languard Point, The Man Whose Mind Exploded

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 the Nordic Film and TV Fund, the German Federal Film Fund, CNC, Swissimage
2. EM Media ceased trading in February 2013.

- For more on the UK film economy, see Chapter 21 (page 220)
- For more on film education, see Chapter 16 (page 169)
- For more on UK film tax relief, see Chapter 18 and http://www.bfi.org.uk/film-industry/british- certification-tax-relief

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Chapter 20

Film industry companies

In the UK, the majority of film industry companies are in the production and post-production sectors, but most of these are small companies. The exhibition sector has the greatest proportion of large companies, the top 10 of which generate 90% of the sector's total turnover.

FACTS IN FOCUS:

In 2013, there were over 5,400 film production companies and over 2,200 post-production companies in the UK.

There were 395 film distributors and 215 film exhibitors.

The majority of companies were small (turnover under £250,000).

The production, post-production and distribution sectors were concentrated in London and the South East, while the exhibition sector was more dispersed.

Outside London and the South East there were significant production and post-production clusters in the East of England, South West, North West, Scotland and Yorkshire and The Humber.

20.1 Number of companies in the film industry

The number of companies involved in the film industry has grown significantly in the last 18 years, particularly in the production sector which saw an increase of 450% between 1996 and 2013, compared with the UK all industries average of 57%. Part of this growth reflects the improvement in coverage in 2008 when companies registered for PAYE, but not for VAT, were added to the totals. It might also 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 not usually be involved in the production of other films. In 2013, there were 9,595 film and video production companies, 470 film and video distributors and 215 exhibitors (Table 20.1).

Table 20.1 Number of companies by industry group, 1996-2013

Year	Film and video production	Film and video distribution	Film exhibition	UK all industries
1996	1,745	355	155	1,380,695
1997	2,460	360	160	1,547,175
1998	3,065	370	160	1,573,935
1999	3,460	380	165	1,595,705
2000	3,900	425	165	1,616,835
2001	4,185	485	190	1,623,025
2002	4,605	515	195	1,619,195
2003	5,065	530	205	1,623,715
2004	5,275	455	200	1,611,535
2005	5,785	445	200	1,631,540
2006	6,210	415	200	1,646,280
2007	6,575	400	200	1,673,835
2008	7,970	435	230	2,161,555
2009	7,965	460	225	2,152,400
2010	8,015	440	225	2,100,370
2011	8,215	465	210	2,080,860
2012	8,865	475	205	2,149,190
2013	9,595	470	215	2,167,580
Growth 1996-2013 (%)	**449.9**	**32.4**	**38.7**	**57.0**

Source: Office for National Statistics

Notes:
From 1996 to 2007, data include only companies registered for VAT.
For 2008-2013, data include in addition companies registered for PAYE but not registered for VAT, so give improved coverage of the company population.
Standard Industrial Classifications (SICs) are used to classify businesses according to the type of their economic activity. The classifications were last revised in 2003 and in 2007. For 1996-2008 data are for 2003 Standard Industrial Classifications (SICs) 9211 (film and video production), 9212 (film and video distribution) and 9213 (film exhibition).
For 2009-2013, film and video production is the sum of 2007 SICs 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).

Image: *Alan Partridge: Alpha Papa* courtesy of StudioCanal

The introduction of the 2007 Standard Industrial Classifications makes possible a more detailed breakdown of the sector, as shown in Tables 20.2 and 20.3. This gives a view of film production and distribution separately from video production and distribution, and confirms that film production and distribution make up the majority of the sector. In 2013, film, video and TV post-production activity represented 22% of companies and 19% of turnover.

Table 20.2 Number of film and video companies by sub-sector, 2013

Sub-sector	Number of companies	% of total
Film production	5,450	53.0
Video production	1,905	18.5
Film, video and TV post-production*	2,240	21.8
Film distribution	395	3.8
Video distribution	75	0.7
Film exhibition	215	2.1
Total	**10,280**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
* 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.

Although film distributors represented less than 4% of the companies, in 2013 they accounted for over one fifth (21%) of the total film industry turnover (Table 20.3). This reflects the dominant position of the UK subsidiaries of the major Hollywood studios in the film value chain.

Table 20.3 Turnover of film and video companies by sub-sector, 2013

Sub-sector	Turnover (£ 000)	% of total
Film production	2,760,227	36.9
Video production	263,009	3.5
Film, video and TV post-production*	1,434,894	19.2
Film distribution	1,579,168	21.1
Video distribution	180,001	2.4
Film exhibition	1,261,656	16.9
Total	**7,478,955**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
* Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.

20.2 Size distribution of film companies

The size distribution of film companies is shown in Tables 20.4 to 20.7. In all sectors apart from film exhibition, the majority of companies were very small with turnover less than £250,000 per year.

Table 20.4 Size distribution of film production companies, 2013

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	95	1.7	c	c
1,000 – 4,999	350	6.4	700,625	25.4
500 – 999	255	4.7	162,623	5.9
250 – 499	410	7.5	138,939	5.0
100 – 249	1,355	24.9	199,330	7.2
50 – 99	1,490	27.3	106,577	3.9
0 – 49	1,495	27.4	c	c
Total	**5,450**	**100.0**	**2,760,227**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
'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 20.5 Size distribution of post-production companies, 2013

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	50	2.2	953,947	66.5
1,000 – 4,999	110	4.9	228,553	15.9
500 – 999	90	4.0	60,552	4.2
250 – 499	150	6.7	53,397	3.7
100 – 249	525	23.4	74,632	5.2
50 – 99	675	30.1	48,034	3.3
0 – 49	640	28.6	15,779	1.1
Total	**2,240**	**100.0**	**1,434,894**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
Percentages may not sum to 100 due to rounding.

Table 20.6 Size distribution of film distribution companies, 2013

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	30	7.6	c	c
1,000 – 4,999	45	11.4	c	c
500 – 999	40	10.1	c	c
250 – 499	45	11.4	c	c
100 – 249	70	17.7	10,111	0.6
50 – 99	75	19.0	5,400	0.3
0 – 49	90	22.8	1,856	0.1
Total	**395**	**100.0**	**1,579,168**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Table 20.7 Size distribution of film exhibition companies, 2013

Turnover size band £ 000	Number	%	Turnover (£ 000)	%
5,000+	10	4.7	1,136,544	90.1
1,000 – 4,999	35	16.3	78,299	6.2
500 – 999	30	14.0	23,170	1.8
250 – 499	40	18.6	12,722	1.0
100 – 249	50	23.3	8,241	0.7
50 – 99	25	11.6	1,996	0.2
0 – 49	25	11.6	684	0.1
Total	**215**	**100.0**	**1,261,656**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
Percentages may not sum to 100 due to rounding.

20.3 National/regional distribution of film companies in the UK

Tables 20.8 and 20.9 show the national/regional distribution of film companies and film company turnover in 2013. Overall, 71% of film companies were concentrated in London and the South East and over 80% of turnover was generated by companies located in these two regions. The London concentration was particularly strong for distribution (61% of companies and 94% of turnover) but the exhibition sector was more widely spread across the UK, with 72% of companies and 42% of turnover associated with companies based outside London.

While London and the South East dominate in production and post-production, there are significant national and regional centres, particularly in the East of England, the South West, the North West, Scotland and Yorkshire and The Humber.

Table 20.8 National/regional distribution of film companies, 2013

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Number	%	Number	%	Number	%	Number	%	Number	%
London	3,100	56.9	1,130	50.4	240	60.8	60	27.9	4,530	54.6
South East	825	15.1	440	19.6	70	17.7	25	11.6	1,360	16.4
East of England	330	6.1	150	6.7	25	6.3	30	14.0	535	6.4
South West	275	5.0	140	6.3	15	3.8	20	9.3	450	5.4
North West	180	3.3	95	4.2	15	3.8	15	7.0	305	3.7
Scotland	165	3.0	60	2.7	5	1.3	15	7.0	245	3.0
Yorkshire and The Humber	155	2.8	45	2.0	5	1.3	15	7.0	220	2.7
West Midlands	120	2.2	60	2.7	10	2.5	5	2.3	195	2.3
Wales	100	1.8	35	1.6	5	1.3	10	4.7	150	1.8
East Midlands	90	1.7	40	1.8	5	1.3	10	4.7	145	1.7
North East	55	1.0	25	1.1	0	0.0	0	0.0	80	1.0
Northern Ireland	55	1.0	20	0.9	0	0.0	10	4.7	85	1.0
UK	**5,450**	**100.0**	**2,240**	**100.0**	**395**	**100.0**	**215**	**100.0**	**8,300**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
Percentages may not sum to 100 due to rounding.

Table 20.9 National/regional distribution of film company turnover, 2013

	Film production		Post-production		Film distribution		Film exhibition		Total UK film	
	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%	Turnover (£ 000)	%
London	2,129,819	77.2	1,201,071	83.7	1,486,443	94.1	735,000	58.3	5,552,333	78.9
South East	186,668	6.8	101,156	7.0	c	c	6,259	0.5	c	c
East of England	94,385	3.4	31,568	2.2	33,951	2.1	24,188	1.9	184,092	2.6
South West	89,823	3.3	30,524	2.1	c	c	17,892	1.4	c	c
North West	57,472	2.1	c	c	5,562	0.4	c	c	c	c
Wales	47,984	1.7	c	c	c	c	c	c	c	c
Scotland	42,189	1.5	c	c	c	c	10,125	0.8	62,036	0.9
Yorkshire and The Humber	41,364	1.5	c	c	c	c	9,188	0.7	c	c
East Midlands	22,485	0.8	c	c	c	c	c	c	131,280	1.9
Northern Ireland	21,238	0.8	c	c	0	0.0	32,739	2.6	c	c
West Midlands	17,018	0.6	7,186	0.5	4,079	0.3	c	c	c	c
North East	9,782	0.4	2,148	0.1	c	c	c	c	14,306	0.2
UK	**2,760,227**	**100.0**	**1,434,894**	**100.0**	**1,579,168**	**100.0**	**1,261,656**	**100.0**	**7,035,945**	**100.0**

Source: Office for National Statistics

Notes:
Data as at March 2013.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.
The geographic distribution of turnover is given by the location of the company, not its local units, so a London concentration may be overstated for companies such as cinema chains that have local units around the UK.
The overall total differs from that in Table 20.3 as it excludes figures for video production and distribution.
Percentages may not sum to 100 due to rounding.

20.4 Leading film production companies in the UK

Drawing on the BFI Research and Statistics Unit's production database and public information, Table 20.10 presents the production companies involved in the most productions in the UK over the three-year period 2011 to 2013. Working Title Films came top of the list with 13 films with a combined budget of £249 million (equivalent to a mean budget per film of £19 million), followed by Press On Features also with 13 films (combined budget of £12 million) and Vertigo Films with 11 films (combined budget of £26 million).

Table 20.10 Top 20 production companies involved in UK production, ranked by number of films, 2011-2013

Production company	Number of films	Estimated combined budget (£ million)	Selected titles
Working Title Films	13	249	About Time, Closed Circuit, I Give It a Year, Les Misérables
Press On Features	13	12	Essex Boys Retribution, Riot, The Warning
Vertigo Films	11	26	All Stars, Pusher, StreetDance 2, The Sweeney
Revolution Films	9	55	360, Good Vibrations, The Look of Love, Rush
Met Film Production	9	1	The Great Hip Hop Hoax, Pantomime, Village at the End of the World, Town of Runners
Passion Pictures	8	10	How I Live Now, Manhunt, Searching for Sugar Man
Scott Free Films	7	273	The Counsellor, Springsteen & I, Welcome to the Punch
Templeheart Films	7	1	Ibiza Undead, The Rise and Fall of a White Collar Hooligan, The Zombie King
Matador Pictures	6	29	All Is by My Side, Flying Blind, The Numbers Station
The Fyzz Facility	6	8	The Anomaly, Interview with a Hitman, Legendary: Tomb of the Dragon
Film & Music Entertainment	6	6	Amsterdam Express, Epic aka Welcome to Karastan, Goltzius and the Pelican Company
Black & Blue Films	6	2	Elfie Hopkins, How to Stop Being a Loser, Strippers vs Werewolves
New Black Films	6	2	The Battle of the Sexes, Shooting for Socrates, The White Room
Pulse Films	6	2	Backstreet Boys: The Movie, Nick Cave: 20,000 Days on Earth, Shut Up and Play the Hits
Chata Pictures	6	1	The Fall of the Essex Boys, White Collar Hooligan 2: England Away, Vendetta
Big Talk Productions	5	37	Cuban Fury, Sightseers, The World's End
Fulwell 73	5	28	The Class of '92, JLS: Eyes Wide Open, One Direction: This Is Us
Baby Cow Films	5	20	Alan Partridge: Alpha Papa, The Look of Love, Philomena
Sixteen Films	5	11	The Angels' Share, Jimmy's Hall, The Spirit of '45

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 funding 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. This cut-off point omits a number of other major production companies behind well-known UK films, including DJ Films, Heyday Films, Number 9 Films and Potboiler Productions.

- For film production company activity levels in 2013 see Chapter 17 (page 178)
- For more on film distributors in the UK in 2013 see Chapter 9 (page 93)
- For more on film exhibitors in the UK in 2013 see Chapter 10 (page 104)
- For numbers and size distribution of film workplaces in 2013 see Chapter 22 (page 232)

Chapter 21

The UK film economy

The UK film industry is a valuable sector of the British economy and has grown considerably over the last 20 years. In 2012, its direct contribution to Gross Domestic Product was £2.9 billion, more than twice its 1995 contribution in real terms.

FACTS IN FOCUS:

In 2012, the UK film industry had a turnover of £7.3 billion (excluding video distribution).

The UK film industry's direct contribution to UK Gross Domestic Product (GDP) represented 4% of the GDP of all the creative industries.

The industry exported £1.3 billion worth of services in 2012, made up of £792 million in royalties and £550 million in film production services.

Exports in 2012 were 71% higher than in 1995.

The UK film trade surplus in 2012 was £789 million.

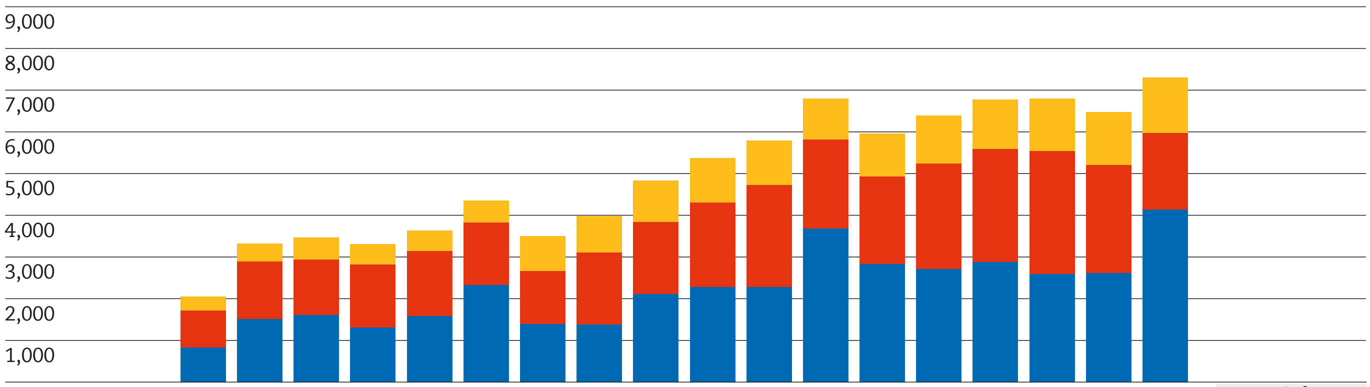
21.1 Film industry turnover, 1995-2012

Figure 21.1 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 period 1995-2012. (2012 is the latest year for which data are available.) Each of the three sectors has shown strong growth over this period, with total industry turnover increasing from £2 billion in 1995 to over £7 billion in 2012. However, for 2009, 2011 and 2012 the turnover for film and video distribution includes only film distribution as the data for video distribution are confidential.

The chart shows that turnover for film distribution decreased significantly from £2.6 billion in 2011 to £1.8 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. The reclassifications are contained within the Standard Industrial Classification (SIC) 5913 (film, video and TV programme distribution), and turnover for this class as a whole has increased from £3 billion in 2011 to £3.5 billion in 2012. (For both video distribution and TV programme distribution, the latter of which is not included in our analysis, the turnover figures are confidential in 2009, 2011 and 2012.) For more on the classifications, see Chapter 20.

Figure 21.1 Total turnover of UK film industry by sector, 1995-2012

£ million



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 1995-2012
Film and video production (including post – production)	829	1,514	1,612	1,306	1,589	2,334	1,402	1,389	2,119	2,281	2,280	3,693	2,830	2,717	2,889	2,596	2,620	4,140	399.4
Film and video distribution	895	1,385	1,328	1,521	1,555	1,494	1,271	1,721	1,718	2,030	2,450	2,125	2,105	2,524	2,710	2,950	2,592	1,833	104.8
Film exhibition	329	420	527	485	485	519	828	871	987	1,065	1,065	976	1,022	1,141	1,176	1,257	1,264	1,322	301.8
Total	**2,053**	**3,319**	**3,467**	**3,312**	**3,629**	**4,347**	**3,501**	**3,981**	**4,824**	**5,376**	**5,795**	**6,794**	**5,957**	**6,382**	**6,775**	**6,803**	**6,476**	**7,295**	**255.3**

Source: Office for National Statistics Annual Business Inquiry and Annual Business Survey

Notes:
'Total turnover' is expressed in current values, ie not adjusted for inflation.
Standard Industrial Classifications (SICs) are used to classify businesses according to the type of their economic activity. The classifications were last revised in 2003 and in 2007.
For 1995-2007 data are for 2003 SICs 9211 (film and video production), 9212 (film and video distribution) and 9213 (film exhibition).
For 2008 onwards, we define film and video production as the sum of 2007 SICs 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 4-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 2011 have been revised since publication of the 2013 edition of the Yearbook.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

The 2007 SIC provides a more detailed breakdown of the industry by sub-sector, as shown in Table 21.1. This gives an official measure of film production and distribution separate from video production and distribution, and confirms that film production and distribution make up the majority of the industry. It also highlights the relative importance of the post-production sector (22% of turnover) which can be separately identified in the 2007 SIC.

Table 21.1 Total turnover of UK film industry by sub-sector, 2012

Sub-sector	Turnover (£ million)	% of total
Film production	2,260	31.0
Video production	293	4.0
Film, video and TV post-production	1,587	21.8
Film distribution	1,833	25.1
Video distribution	c	c
Film exhibition	1,322	18.1
Sector total (excluding video distribution)	**7,295**	**100.0**

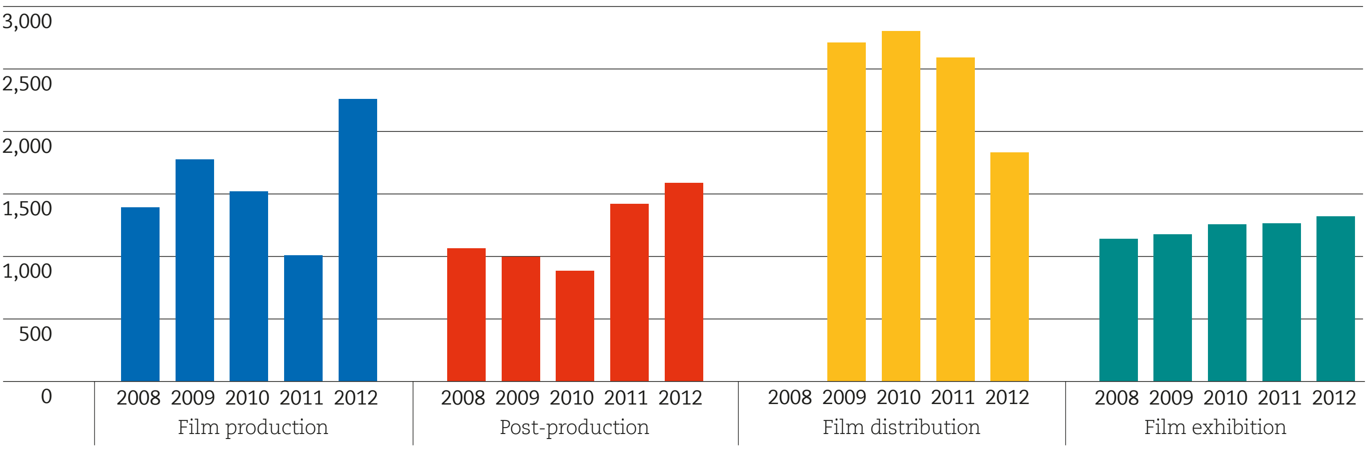
Source: Office for National Statistics Annual Business Survey

Notes:
Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.
'c' indicates the data have been made confidential by the Office for National Statistics to avoid disclosing details of individual companies.

Figure 21.2 shows the turnover for film production, film, video and TV post-production, film distribution and film exhibition from 2008 to 2012. Film distribution was the sub-sector with the highest turnover up to 2011 but, due to the reclassifications of businesses within the distribution sector, turnover for film distribution fell by £760 million between 2011 and 2012, and in 2012 film distribution turnover was lower than that for film production. The turnover for post-production has shown increases since 2010 and the turnover for exhibition has increased slightly every year over the period.

Figure 21.2 Total turnover of film sub-sectors, 2008-2012

£ million



	Film production 2008	2009	2010	2011	2012	Post-production 2008	2009	2010	2011	2012	Film distribution 2008	2009	2010	2011	2012	Film exhibition 2008	2009	2010	2011	2012
Turnover	1,393	1,778	1,520	1,010	2,260	1,065	996	885	1,421	1,587	c	2,710	2,805	2,592	1,833	1,141	1,176	1,257	1,264	1,322

Source: Office for National Statistics Annual Business Survey

See notes to Table 21.1.

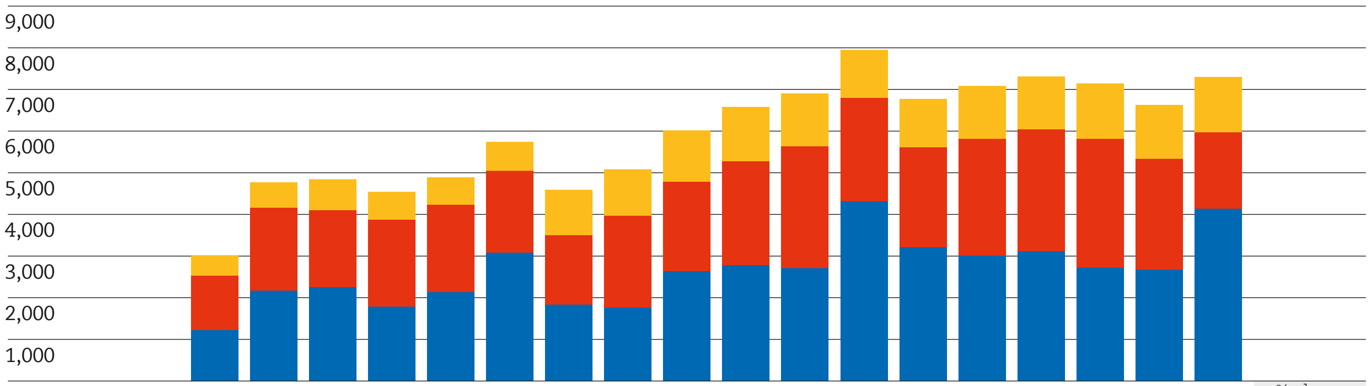
The total industry turnover expressed in real terms, ie with the effects of inflation removed, is shown in Figure 21.3. The real increase since 1995 has been significant: 239% for film and video production and 173% for film exhibition. Overall, in real terms, based on available data the industry's turnover in 2012 was almost two and a half times its 1995 level. However, this is an underestimate as our 2012 turnover data do not include figures for video distribution, as these data are confidential.

With turnover for video distribution not included in the 2012 figures, the growth in real turnover for film and video distribution appears to be just 39%. Also, real turnover for film distribution fell from £2.7 billion in 2011 to £1.8 billion in 2012, due to the reclassifications of businesses in the distribution sector, as explained above.

For the film industry as a whole (excluding video distribution in 2012), real turnover was just under £7.3 billion in 2012, a similar level to 2009 (the second highest level in the period shown in Figure 21.3) but higher than 2010 and 2011. The highest real turnover of the period was in 2006 when total turnover was over £7.9 billion in 2012 pounds.

Figure 21.3 Inflation-adjusted turnover of UK film industry by sector, 1995-2012

£ million (2012 pounds)



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 1995–2012
Film and video production (including post – production)	1,220	2,174	2,253	1,793	2,140	3,083	1,839	1,773	2,644	2,792	2,716	4,320	3,218	3,014	3,117	2,726	2,681	4,140	239.2
Film and video distribution	1,318	1,989	1,856	2,088	2,094	1,973	1,667	2,197	2,144	2,485	2,918	2,486	2,394	2,800	2,924	3,097	2,652	1,833	39.1
Film exhibition	484	603	736	666	653	686	1,086	1,112	1,232	1,304	1,269	1,142	1,162	1,266	1,269	1,320	1,293	1,322	172.9
Total	**3,022**	**4,767**	**4,845**	**4,546**	**4,888**	**5,742**	**4,592**	**5,083**	**6,019**	**6,581**	**6,903**	**7,948**	**6,774**	**7,079**	**7,309**	**7,143**	**6,627**	**7,295**	**141.4**

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.
Values expressed in constant 2012 pounds.
For sector classifications, see notes to Figure 21.1.
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 4-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.

21.2 Film industry contribution to GDP, 1995-2012

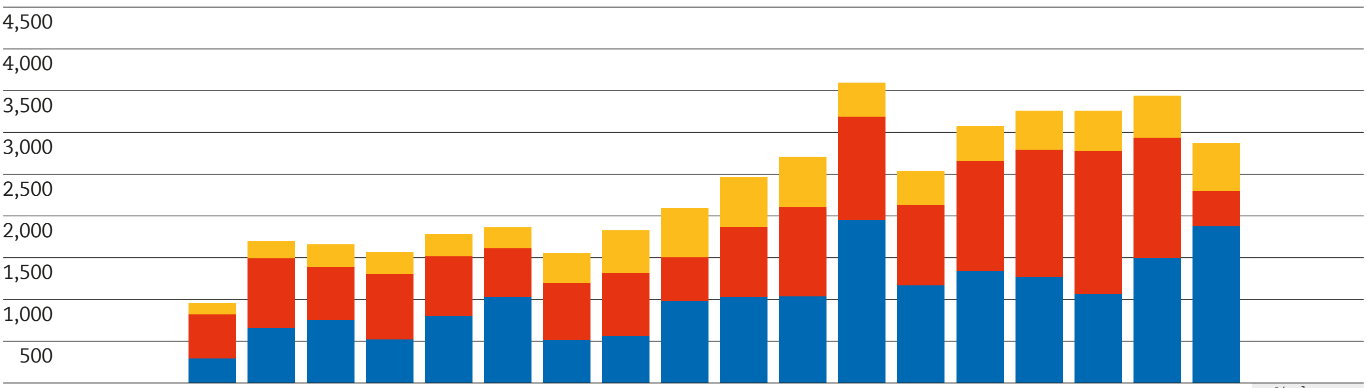
The direct contribution an industry makes to UK Gross Domestic Product is measured by its gross value added (GVA). 'Value added' is industry turnover minus the cost of inputs bought from other industries. The main components of value added are wages and salaries, interest and company profits. Value added 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 2012, not including the GVA for video distribution, was £2.9 billion. According to data published by the government in January 2014, the GVA for all UK creative industries in 2012 was £71.4 billion, so film accounted for at least 4% of all creative industries' value added.

For the film industry as a whole (again with the exception of video distribution), production accounted for 58% of the industry's value added, distribution 25% and exhibition 18%. Also, as with turnover (see section 21.1 above), the value added for film distribution decreased between 2011 and 2012 due to the reclassifications of businesses in the distribution sector.

Figure 21.4 UK film industry gross value added, 1995-2012

£ million



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 1995–2012
Film and video production (including post – production)	299	663	758	525	805	1,032	514	562	983	1,032	1,035	1,957	1,170	1,342	1,275	1,071	1,497	1,875	527.1
Film and video distribution	522	829	638	784	716	582	689	760	520	841	1,072	1,232	964	1,317	1,517	1,706	1,442	425	-18.6
Film exhibition	135	208	264	260	266	250	354	504	592	592	600	407	403	415	466	483	500	570	322.2
Total	**956**	**1,700**	**1,660**	**1,569**	**1,787**	**1,864**	**1,557**	**1,826**	**2,095**	**2,465**	**2,707**	**3,596**	**2,537**	**3,074**	**3,258**	**3,260**	**3,439**	**2,870**	**200.2**

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 4-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 2008, 2010 and 2011 have been revised since publication of the 2013 Yearbook.

Table 21.2 shows the GVA breakdown in 2012 by 2007 SICs. Film, video and TV post-production was the highest single contributor (£927 million, 32% of the total) followed by film production (£797 million, 28% of the total).

Table 21.2 UK film industry gross value added 2012

Sub-sector	GVA (£ million)	% of total
Film production	797	27.8
Video production	151	5.3
Film, video and TV post-production	927	32.3
Film distribution	425	14.8
Video distribution	c	c
Film exhibition	570	19.9
Sector total (excluding video distribution)	**2,870**	**100.0**

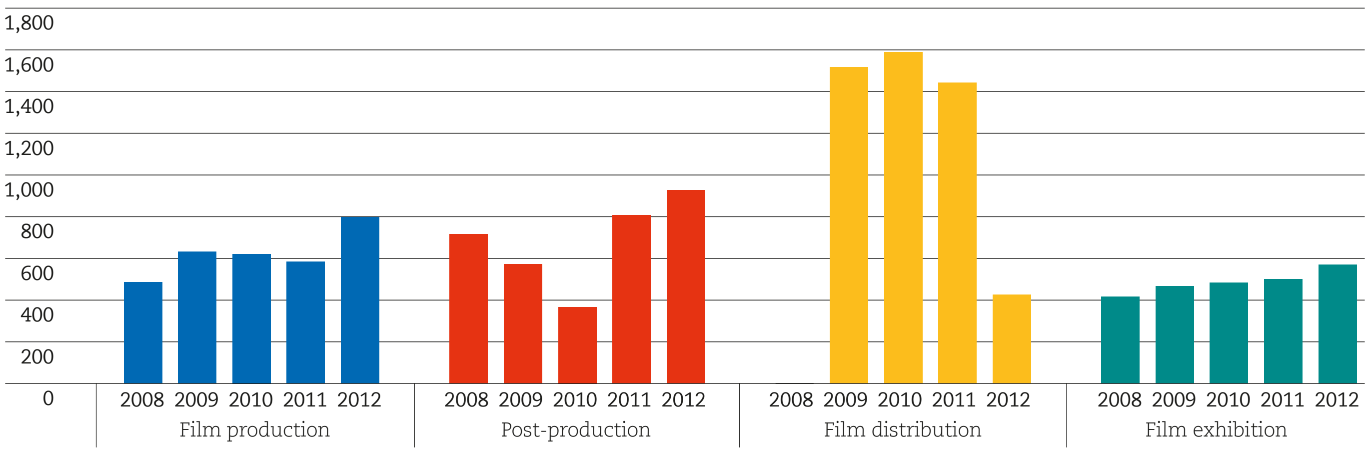
Source: Office for National Statistics Annual Business Survey

Notes:
Companies in the post-production sector usually work on films, commercials, videos and television programmes, and therefore have a combined statistical classification.
'c' indicates the GVA of video distribution is suppressed to avoid disclosing confidential data.
Percentages may not sum to 100 due to rounding.

The patterns of GVA by sub-sector from 2008 to 2012 are similar to those for total turnover (Figure 21.5). As with turnover, film distribution consistently had the highest value added between 2008 and 2011 but, because of the reclassifications of companies within distribution described above, the contribution to GVA for film distribution in 2012 fell to just over £400 million. Film production, film, video and TV post-production and film exhibition all showed increases in value added between 2011 and 2012.

Figure 21.5 Gross value added of film sub-sectors, 2008-2012

£ million



	Film production 2008	2009	2010	2011	2012	Post-production 2008	2009	2010	2011	2012	Film distribution 2008	2009	2010	2011	2012	Film exhibition 2008	2009	2010	2011	2012
GVA	486	631	621	585	797	716	572	367	806	927	c	1,517	1,588	1,442	425	415	466	483	500	570

Source: Office for National Statistics Annual Business Survey

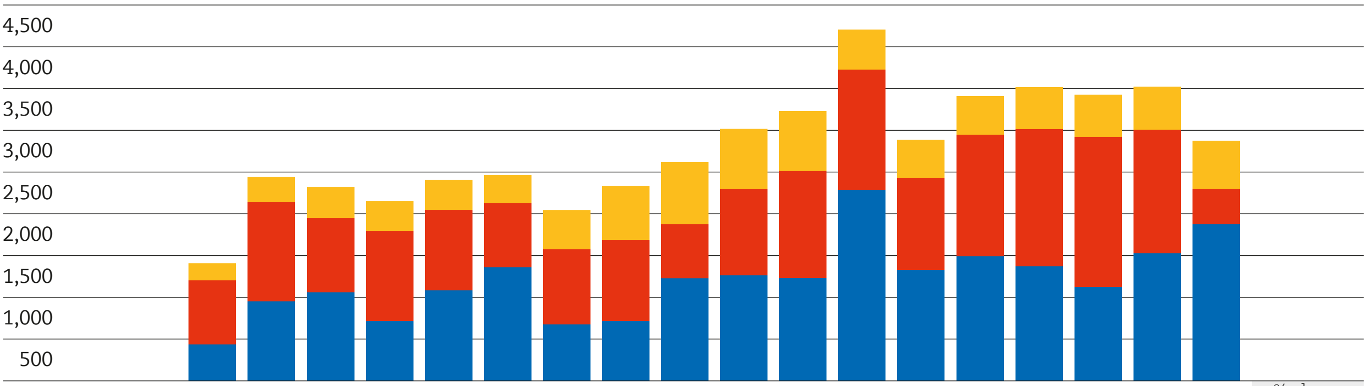
See notes to Table 21.2.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Figure 21.6 shows the industry's value added expressed in real terms, ie with the effects of inflation removed. There was a sharp increase in real industry GVA between 1995 and 1996, followed by a plateau from 1996 to 2002. Real GVA then began to increase strongly again, reaching a peak of £4 billion in 2006. For the four years 2008 to 2011, real GVA stayed at around £3.5 billion (in 2012 pounds) but decreased in 2012 to £2.9 billion. The decrease was mainly due to the reduction in GVA for film distribution, caused by the reclassifications of companies within the distribution sector. In real terms, GVA for the film industry as a whole in 2012 was more than twice its value in 1995.

Figure 21.6 UK film industry real gross value added, 1995-2012

£ million (2012 pounds)



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	% change 1995–2012
Film and video production (including post production)	440	952	1,059	721	1,084	1,363	674	718	1,227	1,263	1,233	2,289	1,330	1,489	1,375	1,125	1,532	1,875	326.0
Film and video distribution	768	1,191	892	1,076	964	769	904	970	649	1,029	1,277	1,441	1,096	1,461	1,637	1,791	1,476	425	-44.7
Film exhibition	199	299	369	357	358	330	464	644	739	725	715	476	458	460	503	507	512	570	186.8
Total	**1,407**	**2,442**	**2,320**	**2,154**	**2,407**	**2,462**	**2,042**	**2,331**	**2,614**	**3,017**	**3,225**	**4,207**	**2,885**	**3,410**	**3,515**	**3,423**	**3,519**	**2,870**	**103.9**

Source: Office for National Statistics Annual Business Inquiry, HM Treasury

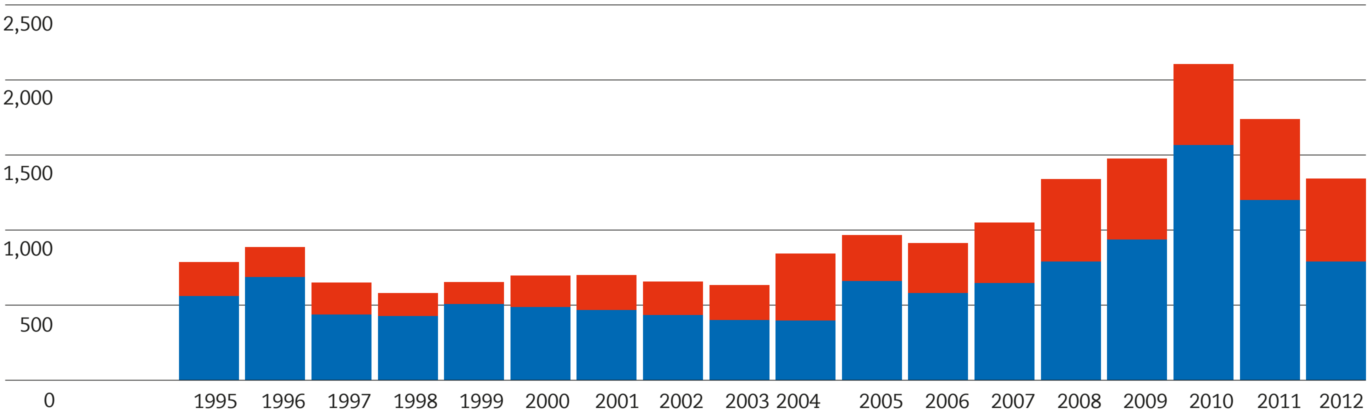
Notes:
The deflator used to calculate real values is the UK whole economy deflator.
Values expressed in constant 2012 pounds.
For 2008 both film distribution and video distribution are suppressed by the ONS as confidential. The figure shown for the sum of the two is the 4-digit class total (5913) minus TV distribution (59133).
For 2009, 2011 and 2012, only film is included in the distribution sector as the data for video distribution are confidential.

21.3 Film exports, 1995-2012

The UK film industry exported £1,342 million worth of services in 2012 (the latest year for which data are available), of which £792 million came from royalties and £550 million from film production services (Figure 21.7). Royalties fell by one third (34%) compared with 2011, but the export value of film-related services was slightly higher (2%) in 2012 than in 2011. Total film exports in 2012 were 71% higher than in 1995.

Figure 21.7 UK film industry exports, 1995-2012

£ million



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Royalties	560	686	438	427	508	487	468	434	400	399	660	582	646	792	936	1,565	1,199	792
Film production services	227	202	212	154	145	210	232	222	233	444	307	330	403	549	541	541	540	550
Total film company exports	**787**	**888**	**650**	**581**	**653**	**697**	**700**	**656**	**633**	**843**	**967**	**912**	**1,049**	**1,341**	**1,476**	**2,106**	**1,739**	**1,342**

Source: Office for National Statistics

Notes:
Data for 2013 are expected to be available at the end of January 2015.
The export data to 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 Standard Industrial Classification 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. This chart shows the results for film companies only.

21.4 Film imports, 1995-2012

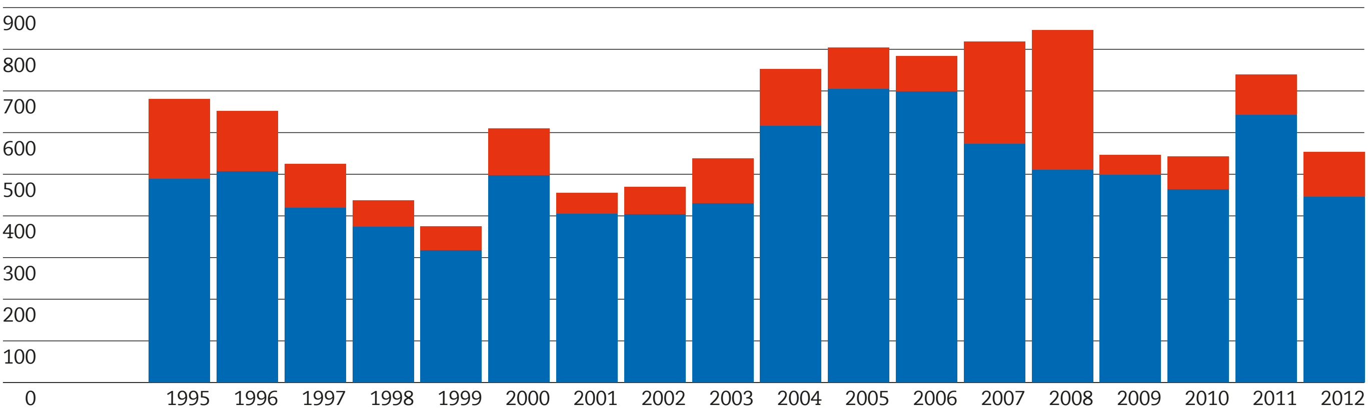
The UK film industry imported £553 million worth of services in 2012, of which £445 million (80%) comprised royalties and £108 million (20%) film production services.

As Figure 21.8 shows, in most years royalties make up the vast majority of imports with film production services accounting for only around 15% of the total. In 2007 and 2008, this pattern changed, with the royalties share dropping to 60% and the share for production services increasing to 40%. Between 2008 and 2012, however, the production services share of the imports total decreased to similar percentages seen before 2007.

The reasons for the increase of the production services share in 2007 and 2008 are unclear as the reported level of production imports is high in relation to total UK film production for these years (see Chapter 17). One possible explanation could be the categorisation of the non-UK spend of UK/USA inward investment productions as imports of production services. However, this explanation cannot be confirmed as the survey returns are confidential.

Figure 21.8 UK film industry imports, 1995-2012

£ million



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Royalties	489	507	419	374	317	497	405	403	430	616	704	698	573	510	498	463	642	445
Film production services	192	145	106	63	58	113	50	67	108	136	100	86	245	336	49	80	98	108
Total film company imports	**681**	**652**	**525**	**437**	**375**	**610**	**455**	**470**	**538**	**752**	**804**	**784**	**818**	**846**	**547**	**543**	**740**	**553**

Source: Office for National Statistics

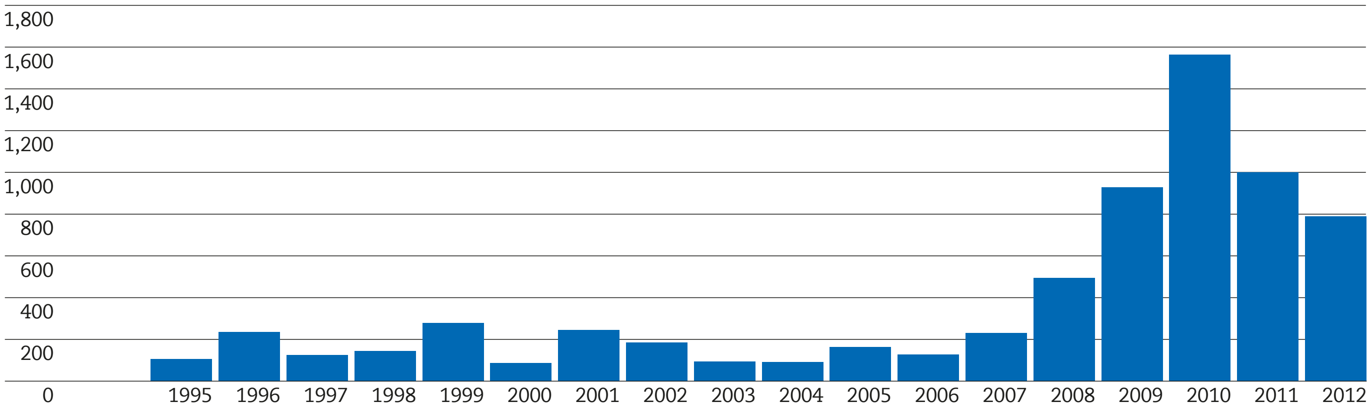
See notes to Figure 21.5.

21.5 The film trade balance, 1995-2012

The film industry has made a continuous positive contribution to the UK balance of payments since 1995, as Figure 21.9 shows. The trade surplus (positive balance of exports over imports) in 2012 was £789 million.

Figure 21.9 Trade surplus of UK film industry, 1995-2012

£ million



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Balance	106	236	125	144	278	87	245	186	95	91	163	128	231	495	929	1,564	1,000	789

Source: Office for National Statistics

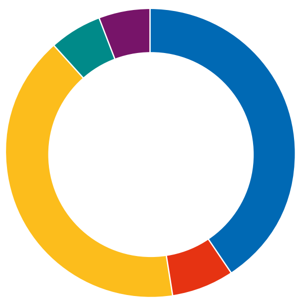
Note: 'Trade surplus' equals exports minus imports. Where a company (eg the UK subsidiary of a US major) receives income from another country on behalf of its parent company and subsequently passes it on to its parent company, this is recorded both as a receipt and a payment, leaving the measure of the trade surplus unaffected.

21.6 Film export markets

Figure 21.10 shows the geographic distribution of UK film exports for the years 2008-2012. The leading export destinations were the USA and the European Union (EU), both of which accounted for 41% of the film export market. However, Europe as a whole is a bigger market than the USA, and accounts for 48% of all UK film exports. Asia and 'rest of the world' both took 6% of the total.

Figure 21.10 Destination of UK film exports as percentage of the total, 2008-2012

	%
EU	40.8
Other Europe	6.8
USA	40.9
Asia	5.8
Rest of the world	5.8



Source: Office for National Statistics

Note: 'Rest of the world' cannot be disaggregated due to sampling variation and disclosive data.

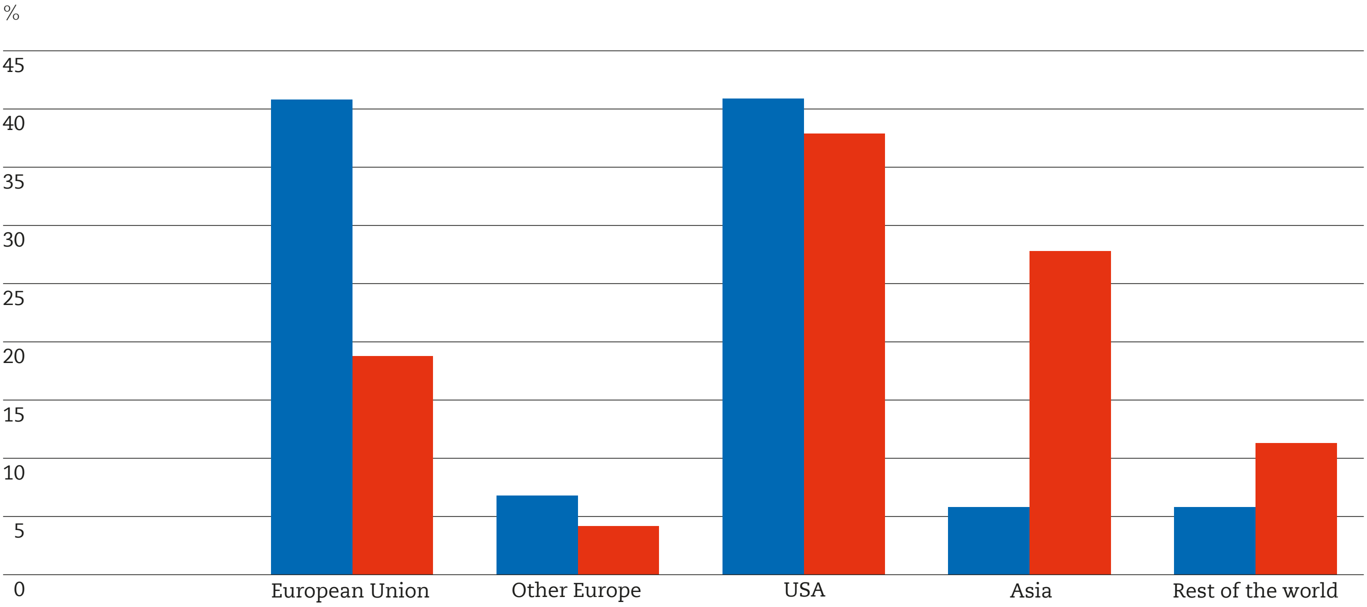
21.7 UK film exports compared with the global market for filmed entertainment

A useful comparison can be made between UK film export shares and the geographical distribution of the global market for filmed entertainment (Figure 21.11). For the EU, USA and 'other Europe' the shares of UK exports are higher than the shares of the ex-UK global filmed entertainment market in each of those regions, whereas the reverse is true in Asia and 'rest of the world'. The differences that stand out are:

- The higher proportion of UK exports to Europe (41% of the UK's film exports are to the EU compared with the EU's 19% share of the ex-UK global filmed entertainment market, and 7% of film exports are to 'other Europe' compared with a 4% ex-UK global market share);
- The lower proportion of UK exports to Asia (6%) compared with the Asian countries' share of the ex-UK global market (28%).

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 Hollywood and UK films.

Figure 21.11 UK export shares, 2008-2012, compared with the ex-UK global market for filmed entertainment, 2013



	European Union	Other Europe	USA	Asia	Rest of the world
% of total film exports	40.8	6.8	40.9	5.8	5.8
% of total ex-UK global filmed entertainment market	18.8	4.2	37.9	27.8	11.3

Sources: Office for National Statistics, PricewaterhouseCoopers

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

21.8 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 9% of the film trade balance, with 'rest of the world', as shown in Table 21.3. In the years 2008-2012, just over two fifths of the surplus came from the EU and, in contrast with some earlier years, the UK ran large film trade surpluses with the USA during the latest five-year period, which has led to the USA accounting for just over half of the UK's film trade surplus in 2008-2012.

Table 21.3 International transactions of the UK film industry by geographical area, average, 2008-2012

	Exports (£ million)	Imports (£ million)	Balance (£ million)	% balance
EU	652.4	233.2	419.2	43.9
Other Europe	108.4	42.0	66.4	7.0
USA	654.6	161.8	492.8	51.6
Asia	92.8	32.4	60.4	6.3
Rest of the world	92.6	176.4	-83.8	-8.8
Total	**1,600.8**	**645.8**	**955.0**	**100.0**

Source: Office for National Statistics

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

- For more on the UK and global film market see Chapter 14 (page 151)
- For more on the performance of UK films internationally see Chapter 6 (page 60)
- For more on inward investment in film production in the UK see Chapter 17 (page 178)
- For more on public investment in film see Chapter 19 (page 204)

- For more on economic estimates for all creative industries see https://www.gov.uk/government/publications/creative-industries-economic-estimates-january-2014

Chapter 22

Employment in the film industry

The UK film industry employs significant numbers of skilled people but is a volatile employment sector. In 2013, employment was high with more than 66,000 people working across the industry's three main sectors.

FACTS IN FOCUS:

In 2013, over 66,000 people worked in the UK film industry, of whom 42,000 worked in film and video production.

Employment in film and video production was concentrated in London and the South East.

Just under half (45%) of people working in film and video production were freelance.

Women made up just 14% of both screenwriters and directors of UK films released in the UK in 2013 (in 2012, 13% of screenwriters and 8% of directors of UK films released were women).

Most film industry businesses had low numbers of employees, in particular those involved in film and video production, where 95% of workplaces employed 10 people or fewer.

22.1 The workforce

According to the Annual Population Survey (APS) conducted by the Office for National Statistics (ONS), over 66,000 people worked in film and video production and distribution, and film exhibition in the year 2013 (Oct 2012-Sep 2013). The figures include full- and part-time workers. Table 22.1 shows the breakdown.

Table 22.1 Film industry workforce, 2013

Sector	Number in employment
Film and video production	42,000
Film and video distribution	6,000
Film exhibition	18,000
Total	**66,000**

Source: Office for National Statistics Annual Population Survey

Notes:
Numbers in employment are taken from the Annual Population Survey for the period October 2012 to September 2013.
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.

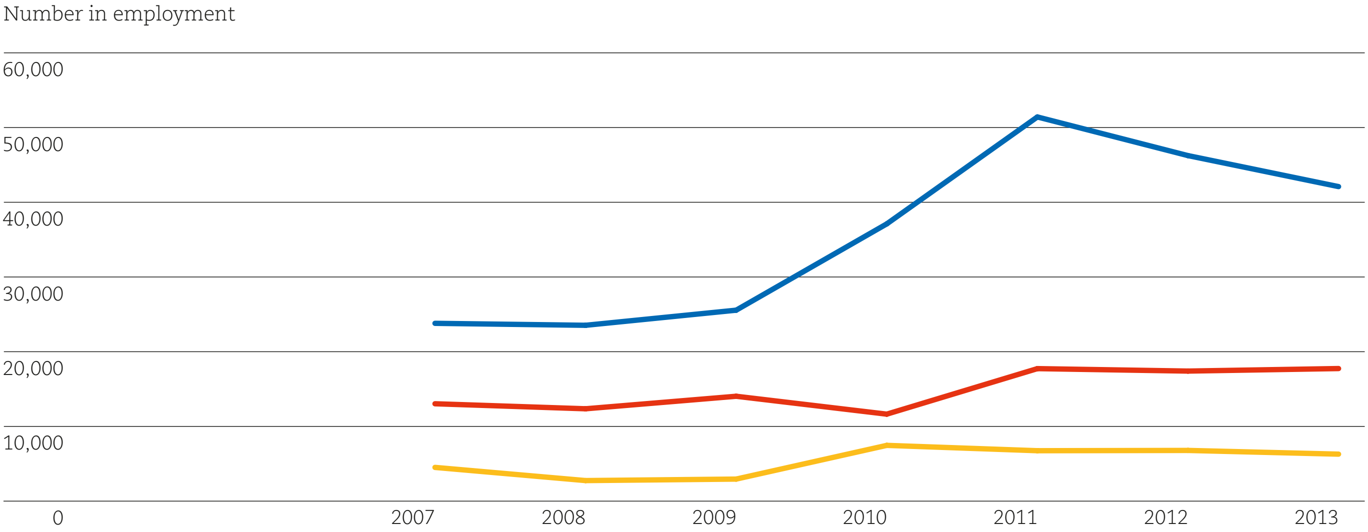
Changes to Labour Force Survey estimates presented in the Yearbook

Previous editions of the Yearbook have shown estimates of employment in the film industry based on results from the quarterly Labour Force Survey (LFS). For each year the average of four quarters' data were shown. These four-quarter averages are no longer available from the Office for National Statistics (ONS), so the figures for 2013 presented here are from the Annual Population Survey (APS), which is an annualised version of the LFS. The APS results are based on a larger sample which will result in an increase in precision of the estimates. Also, in previous editions we have shown employment data back to 1996 with a break in the series between 2006 and 2007 due to changes in the Standard Industrial Classifications. In the present chapter we show data back to 2007 all based on the current classifications.

As Figure 22.1 shows, employment levels in film and video distribution and film exhibition increased slightly between 2007 and 2013 but employment in film and video production showed a sharp increase between 2009 and 2011, from 26,000 to 51,000. It then decreased from this peak to 46,000 in 2012 and 42,000 in 2013.

Image: *The Invisible Woman* courtesy of Lionsgate Films

Figure 22.1 Size of the film workforce, 2007-2013



	2007	2008	2009	2010	2011	2012	2013
Film and video production	24,000	24,000	26,000	37,000	51,000	46,000	42,000
Film and video distribution	5,000	3,000	3,000	7,000	7,000	7,000	6,000
Film exhibition	13,000	12,000	14,000	12,000	18,000	17,000	18,000

Source: Office for National Statistics Labour Force Survey and Annual Population Survey

Note:
The employment figures are from the Labour Force Surveys and Annual Population Surveys covering the period October to September so, for example, the data labelled 2013 refer to the period October 2012 to September 2013.

The film and video production sector has traditionally employed a high proportion of freelance workers. In 2013, just over 45% of those engaged in film and video production, a total of more than 19,000 people, were self-employed (Table 22.2).

Table 22.2 Film and video production workforce, 2007-2013

Year	Total in employment	Self-employed	Self-employed as % of total
2007	24,000	11,000	46.3
2008	24,000	12,000	50.0
2009	26,000	15,000	59.8
2010	37,000	23,000	61.9
2011	51,000	31,000	61.3
2012	46,000	21,000	45.7
2013	42,000	19,000	45.4

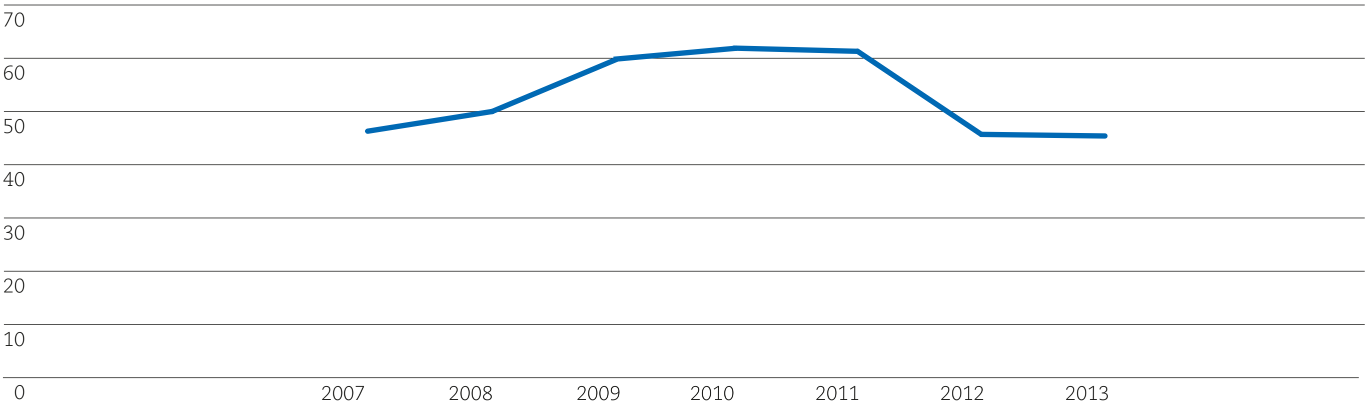
Source: Office for National Statistics Labour Force Survey and Annual Population Survey

Notes:
Year means the year ending September. See note to Figure 22.1.
Numbers in employment are shown to the nearest 1,000 but percentages are based on unrounded numbers.

The proportion of self-employed workers in film and video production fluctuated in the range 45% to just over 60% between 2007 and 2013. In 2007 it was 45%, then increased each year to a peak of 62% in 2010. It then stayed at a similar level in 2011, before reducing to just over 45% in both 2012 and 2013. In comparison, only 14% of the total UK workforce was self-employed in the year to September 2013.

Figure 22.2 Self-employed workers as proportion of total film and video production workforce, 2007-2013

% of total in employment



	2007	2008	2009	2010	2011	2012	2013
Self-employed as % of total	46.3	50.0	59.8	61.9	61.3	45.7	45.4

Source: Office for National Statistics Labour Force Survey and Annual Population Survey

Notes:
Year means the year ending September.
See note to Figure 22.1.

22.2 The gender of writers and directors of UK films

Since 2007, we have been tracking the under-representation of women among screenwriters and directors of UK films. In 2013, we published a report *Succès de plume? Female Screenwriters and Directors of UK Films, 2010-2012* which showed that although the numbers of female writers and directors of UK films released are consistently low, recently higher proportions of women have been associated with successful films (see link at end of chapter). Of the independent UK films released between 2010 and 2012, just 16% of the writers and 11% of the directors were women. However, for the top 20 UK independent films over the same period, women represented 37% of the writers and 18% of the directors. And for profitable UK independent films, 30% of the writers were women.

Successful female writers and directors of independent UK films over this period include: Jane Goldman (*The Woman in Black* and *Kick-Ass*), Debbie Isitt (*Nativity 2: Danger in the Manger*), Phyllida Lloyd and Abi Morgan (*The Iron Lady*), Dania Pasquini and Jane English (*StreetDance* and *StreetDance 2*), and Lucinda Whiteley (*Horrid Henry: The Movie*).

In addition to independent UK films, a number of female writers and directors had success over the same period working on UK-USA studio titles. Examples include: Jane Goldman (*X-Men: First Class*), Lone Scherfig (*One Day*), Sarah Smith (*Arthur Christmas*), Susanna White and Emma Thompson (*Nanny McPhee and the Big Bang*).

In 2013, of the 155 identified writers of UK films released during the year, 22 (14%) were women (Table 22.3).

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Table 22.3 Gender of writers of UK films released in the UK, 2007-2013

	2007	2008	2009	2010	2011	2012	2013
Number of UK films released in the UK	108	111	113	122	127	162	139
Number of writers associated with these films	169	168	139	144	159	187	155
Number of male writers	149	139	116	127	129	162	133
Number of female writers	20	29	23	17	30	25	22
% male	88.2	82.7	83.5	88.2	81.1	86.6	85.8
% female	11.8	17.3	16.5	11.8	18.9	13.4	14.2

Source: BFI

The proportion of female writers in 2013 remained low. Some of the female writers associated with UK films released in the year are: Shannon Hale and Jerusha Hess (*Austenland*) Amy Jump (*A Field in England*) and Abi Morgan (*The Invisible Woman*). As well as being involved in the writing of films, many of the female writers also directed or co-directed their films.

Table 22.4 shows directors by gender for UK films released in the UK in 2013.

Table 22.4 Gender of directors of UK films released in the UK, 2007-2013

	2007	2008	2009	2010	2011	2012	2013
Number of UK films released in the UK	108	111	113	122	127	162	138
Number of directors associated with these films	117	113	122	136	140	179	149
Number of male directors	110	100	101	119	119	165	128
Number of female directors	7	13	21	17	21	14	21
% male	94.0	88.5	82.8	87.5	85.0	92.2	85.9
% female	6.0	11.5	17.2	12.5	15.0	7.8	14.1

Source: BFI

The proportion of female directors in 2013 was higher than in 2012, but it still remained low, at 14%. Some of the female directors associated with UK films released in 2013 are: Clio Barnard (*The Selfish Giant*), Emma Davie and Morag McKinnon (*I Am Breathing*), Sophie Fiennes (*The Pervert's Guide to Ideology*), Tina Gharavi (*I Am Nasrine*) and Jacqui Morris (*McCullin*). Clio Barnard and Tina Gharavi both wrote the screenplays of their films as well as directing them.

22.3 The workplace location

In the year to September 2013, 67% of the UK film and video production workforce was based in London and the South East, compared with less than one third of the workforce as a whole (Table 22.5).

Table 22.5 London and South East employment as percentage of total, 2013

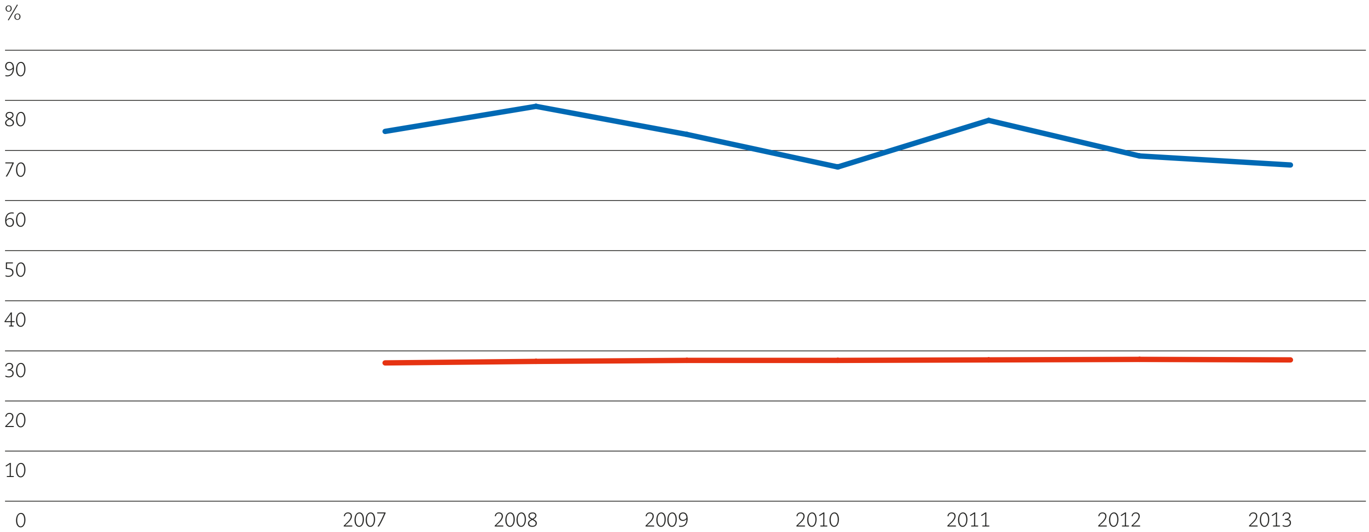
Sector	Total UK employment	London and South East employment	London and South East as % of UK total
UK all industries	29,000,000	8,000,000	28.2
Film and video production	42,000	28,000	67.0

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 period October 2012 to September 2013.
Numbers in employment in the film industry are shown to the nearest 1,000 and for all UK industries are shown to the nearest 1,000,000 but percentages are based on unrounded numbers.

As Figure 22.3 shows, the London and South East share of the film and video production workforce is consistently higher than the proportion for all UK industries, although this share fluctuates from year to year depending in part on the levels of production activity based in the capital and the surrounding major studios. Between 2009 and 2013, this has ranged from just under 67% in 2010 to just under 79% in 2008. In comparison the percentage of the total workforce based in London and the South East is consistently around 28%.

Figure 22.3 London and South East percentage share of the film and video production and total workforce, 2007-2013



	2007	2008	2009	2010	2011	2012	2013
Film and video production	73.8	78.8	73.2	66.7	76.0	68.9	67.1
UK all industries	27.6	27.9	28.1	28.1	28.2	28.3	28.2

Source: Office for National Statistics Labour Force Survey and Annual Population Survey

Notes:
Year means the year to September.
See note to Figure 22.1.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

22.4 The scale of the workplace

Tables 22.6 to 22.8 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 22.6 to 22.8 are from the Inter-Departmental Business Register (IDBR), which is maintained by the Office for National Statistics. These data differ from the estimates shown in sections 22.1 and 22.3 which are based on the Labour Force Survey and Annual Population Survey (APS). The LFS and APS count 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 numbers arising from them should be similar. However, 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 LFS/APS sample size at industry sub-sector level and the fact that there are two classification processes involved. In the LFS/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 LFS/APS and the IDBR measures.

In 2013, the film and video production sector had a very high number of workplaces with low numbers of employees. Workplaces with 1-10 employees accounted for 95% of all workplaces in the sector and nearly half of its total workforce (46%), as Table 22.6 shows. At the other end of the scale, there were a small number of workplaces with a high numbers of employees. The 65 workplaces with 50 or more employees accounted for nearly 8,800 employees, an average of 135 each.

Table 22.6 Numbers of employees in film and video production by size of workplace for the UK, 2013

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	65	0.8	8,789	31.0
11 – 49	315	4.0	6,483	22.9
1 – 10	7,485	95.2	13,089	46.2
Total	**7,865**	**100.0**	**28,361**	**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 2013 was less concentrated in small workplaces than the production sector, with 77% of employees based in workplaces with 11 or more employees and 45% of employees based in workplaces with 50 or more employees (Table 22.7).

Table 22.7 Numbers of employees in film and video distribution by size of workplace for the UK, 2013

Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	10	2.5	1,609	44.7
11 – 49	55	13.6	1,153	32.1
1 – 10	340	84.0	835	23.2
Total	**405**	**100.0**	**3,597**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

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

Table 22.8 shows that the film exhibition sector had a concentration that was the reverse of the production sector, with 50% of employees in workplaces of 50 or more and only 3% in workplaces in the 1-10 employee band.

Table 22.8 Numbers of employees in film exhibition by size of workplace for the UK, 2013

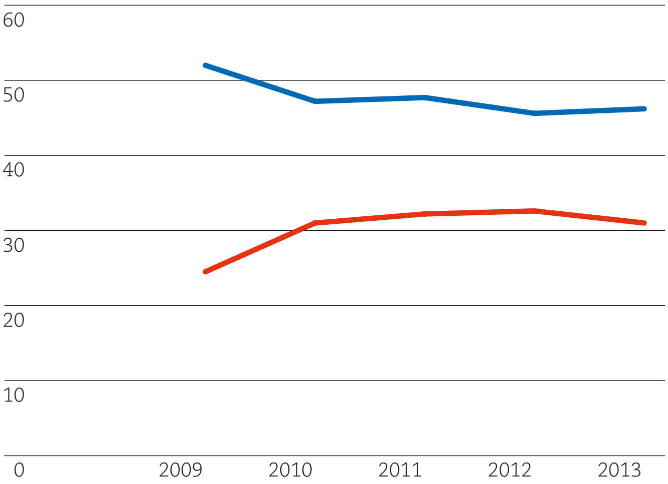
Workplace size band	Number of workplaces in band	% of total workplaces	Number of employees in band	% of total employees
50+	130	22.0	9,381	49.8
11 – 49	305	51.7	8,848	46.9
1 – 10	1558	26.3	624	3.3
Total	**590**	**100.0**	**18,853**	**100.0**

Source: Office for National Statistics Inter-Departmental Business Register

Figure 22.4 shows the percentage of employees in workplaces with 1-10 employees and the percentage in workplaces with 50 or more employees in the film and video production sector from 2009 to 2013. In 2009, over 50% of the workforce was employed in workplaces with 1-10 employees and 25% of the workforce was employed in workplaces with 50 or more employees. Since then the proportion of the workforce based in the smallest workplaces has reduced to between 45% and 46% and the proportion of the workforce in the largest workplaces has increased to just over 30%.

Figure 22.4 Film and video production employees by workplace size band, percentage of total, 2009-2013

% of sector workforce



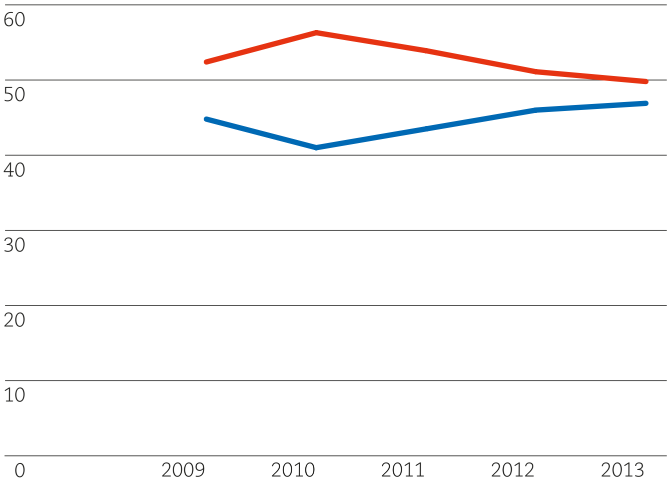
	2009	2010	2011	2012	2013
50+ employees	24.5	31.0	32.2	32.6	31.0
1-10 employees	52.0	47.2	47.7	45.6	46.2

Source: Office for National Statistics Inter-Departmental Business Register

In the film exhibition sector the proportion of employees in workplaces with 50 or more workers has been consistently just over 50% since 2009, and the proportion of employees in workplaces with 11-49 employees has been mainly between 40% and 50%. Over the period the trend for the former category has been downward while the trend for the latter has been upward (Figure 22.5).

Figure 22.5 Film exhibition employees by workplace size band, percentage of total, 2009-2013

% of sector workforce



	2009	2010	2011	2012	2013
50+ employees	52.4	56.3	53.9	51.1	49.8
11-49 employees	44.8	41.0	43.5	46.0	46.9

Source: Office for National Statistics Inter-Departmental Business Register

- For more on film distribution, see Chapter 9 (page 93)
- For more on the exhibition sector, see Chapter 10 (page 104)
- For more on film production, see Chapter 17 (page 178)

- For more on successful women screenwriters of UK films see http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-report-on-female-writers-and-directors-of-uk-films-2013-11.pdf

Glossary

Alternative content
See Event cinema

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)

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)

BVA
British Video Association. The trade body representing the interests of publishers and rights owners of pre-recorded home entertainment on video (www.bva.org.uk)

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 (e.g. GCSE) have been completed and an overall grade should now be awarded

Cinema film classification
Classification given to a film by the British Board of Film Classification for a theatrical 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

DCMS
Department for 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 recorder (DVR)
A digital set-top box with hard drive capable of storing large amounts of audiovisual content. Sometimes referred to as Personal video recorder (PVR)

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 UK feature
A domestic (indigenous) UK feature is a film made by a UK production company that is produced wholly or partly in the UK

Download
See Film download

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). See Video on Demand

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). See Video on Demand

DVD - digital versatile disc
A digital optimal disc storage format, invented and developed in 1995, capable of being played on different types of players

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. Films must either pass the Cultural Test or qualify as an official co-production

Franchise
A film series such as *Harry Potter and the Philosopher's Stone* and its sequels

GCE – General Certificate of Education
An academic qualification comprising Advanced Level (A Level) and Advanced Subsidiary Level (AS Level)

GCSE – General Certificate of Secondary Education
An academic qualification awarded in a specific subject, 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)

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

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

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)

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

MEDIA Programme

The European Union's support programme for the audiovisual industries. From 2007-2013 it had a budget of €755 million. (In January 2014 the Media Programme was replaced by Creative Europe, which was set up to support Europe's creative and cultural sectors)

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)

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)

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

Personal computer (PC)
A lap-top or desk-top computer capable of operating independently of a network (although frequently networked in office environments)

Personal video recorder (PVR)
See Digital video recorder (DVR)

Physical media
Refers to the various physical formats on which video can be distributed, such as VHS, DVD, Blu-ray disc, 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

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). See Video on Demand

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. 'AB' social group refers to people in the Upper Middle and Middle class groups, in higher and intermediate managerial jobs. 'C1' social group refers to people in in the Lower Middle class group, with supervisory or junior managerial jobs. 'C2' social group refers to people in the Skilled Working class group, who are categorised as skilled manual workers. '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

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. See Video on Demand

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. See Video on Demand

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 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; 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 the production activities in the UK' for Cultural Test/Production Costs 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

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 on Demand (VoD)

A system that allows users to select and watch films on a television set, PC or mobile device at the time they want over an interactive network. Online VoD services in the UK employ four basic types of business model (the first two are transactional): rental VoD – one-off rental, also known as download-to-rent (DTR); retail or download-to-own (DTO), also known as electronic-sell-through (EST); subscription VoD (SVoD) – unlimited access to content for a fixed monthly sum; and free/advert-supported VoD from catch up services

Video on physical media

See Physical media

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

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Broadcasters' Audience Research Board (BARB)

Cinema Advertising Association (CAA)

Creative and Cultural Associates

Creative Skillset

Department for Culture, Media and Sport (DCMS)

Department for Education (DfE)

Digital Cinema Media

Dodona Research

European Audiovisual Observatory (EAO)

European Film Agency Research Network (EFARN)

Into Film

FILMCLUB

Film Education

First Light

Higher Education Statistics Agency (HESA)

Her Majesty's Revenue and Customs (HMRC)

Her Majesty's Treasury (HMT)

IHS

Independent Cinema Office (ICO)

Joint Council for Qualifications (JCQ)

Kantar Worldpanel

Nielsen Media Research (NMR)

Ofcom

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BFI activities include:

- Supporting filmmakers, and the industry more widely, through Lottery grants from the Film Fund
- Supporting film education at all levels
- The BFI London Film Festival, BFI Flare: the London LGBT Festival, and the BFI Future Film Festival
- BFI distribution (including UK-wide cinema releases, DVD and online)
- BFI publishing, including Sight & Sound magazine
- Providing research and statistics
- Certifying British films, high-end television and animation programmes eligible for tax relief
- MEDIA Desk UK, facilitating access for film companies to EU funding
- The BFI Cinema and Library
- The BFI National Archive.

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