Film and high-end television programme production in the UK: Q1 2022

BFI Research and Statistics Unit
28 April 2022

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Key points

- The combined total spend on film and high-end television (HETV) production in the UK for Q1 2022 was £1.85 billion from 104 productions. This is the highest combined film and HETV spend on record reported for the Q1 official statistics period, and the second highest combined spend of any quarter on record, behind only Q2 2021. It is 86% higher than the updated Q1 2021 total spend of £944 million.
- The combined total UK spend on film and HETV productions for the 12 months from April 2021 to March 2022 was £6.6 billion. This is by a substantial margin the highest figure seen since records began. It is a 102% increase on the previous 12-month period and 56% higher than the previous 12 month high of £4.2 billion in 2019/2020. Inward Investment productions accounted for £5.6 billion or 83% of the total.
- The latest 12-month period contains the 1st, 2nd and 3rd highest quarters for combined UK spend since the introduction of the HETV tax relief in 2013.
- The total number of film and HETV productions for the latest 12 month period was 448, 21% higher than the 368 productions which started principal photography between April 2020 and March 2021.
- 54 films started shooting during Q1 2022, 20 more than as reported for Q1 2021. The total UK production spend for these films was £847 million a huge rise (more than 8 times greater) from the £100 million reported at the end of Q1 2021. It makes it the highest quarter on record for film UK spend since records began in 2002.
- 228 films began principal photography during the latest 12-month period, with a total UK production spend of £2.3 billion. This is 96% higher than the £1.2 billion seen in the previous 12-month period.
- For the latest 12-month period, inward investment films accounted for 88% of the total spend (£2.0 billion). Spend on UK domestic features was £231 million or 10% of the total, up from £170 million (+36%) reported for the previous rolling 12-month period. Co-production films had a UK spend of £44 million accounted for 2% of the total UK spend.
- 50 HETV productions began principal photography in Q1 2022 with a total UK spend of £999 million, an increase from £788 million reported in the Q1 2021 official statistics release. This is the highest Q1 HETV production spend on record, and the third highest quarter since the introduction of the tax relief in 2013. The Q1 spend on inward investment and co-productions was £831 million (83% of the total) and domestic productions accounted for £168 million.
- 220 HETV productions started principal photography between April 2021 and March 2022, 85 more than in the previous 12 month period. Total HETV production spend was £4.3 billion, nearly double the previous record UK spend (£2.2 billion) seen in the 12 month period of April 2019 – March 2020.

1. Film production in the UK

The total number of films starting principal photography during Q1 2022 was 54, which is 20 more than reported for Q1 2021. The total UK spend of these films was £847 million, 88% higher than the £100 million reported for 2021. In looking back further to the level of feature film production spend prior to the pandemic, this is the single highest quarter for UK spend since records began in 2002.

The breakdown of the type of productions contributing to the spend shows that 23 were inward investment films with a UK spend of £801 million and this accounts for 95% of the total UK film spend. A further 6 features were co-productions with a UK spend of £5 million. In previous years the UK spend figures for Q1 inward investment and co-production have had to be combined for disclosure control reasons. The combined expenditure is 87% up on Q1 2021, 36% up on 2020 (production halted towards the end of Q1 that year) and 27% up on the updated spend figure for the last pre-pandemic year, 2019.

The majority of feature films going into production in Q1 2022 were the 25 domestic productions which contributed £41 million of the total spend, representing a 5% increase from £39 million as reported at the end of Q1 2021. The number of domestic features going into production in Q1 2022 shows a 24% increase on the 19 features that started shooting in Q1 2021.

Inward investment films that started filming in Q1 2022 included *Meg 2: The Trench, Disney's Snow White, Kraven The Hunter* and major Indian project *Action Hero*.

Domestic UK films that started filming during Q1 2022 included *Birchanger Green, Blue Jean, Starve Acre, Borderland* and *Chuck Chuck Baby*. *Falling into Place,* a UK/Germany co-production also started principal photography during Q1 2021.

Table 1 – Number and UK spend of features produced in the UK, Q1 2022

	UK spend £ million	Number of features
Co-productions	**5.2**	**6**
Domestic UK features	**40.6**	**25**
Inward investment	**801.3**	**23**
Total	**847.1**	**54**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
Films are allocated to the calendar quarter in which principal photography started.
Totals may not sum due to rounding.
Inward investment features include films with visual effects (VFX) post production in the UK

In looking more broadly at the UK feature film production landscape it should be noted that production spend contributed by single films – including inward investment and domestic UK projects – which are being financed by the large SVoD platforms are captured in the statistics for high-end television (HETV) as those productions apply for certification to access the UK's HETV tax relief. Please see section *1.1 Single Episode HETV projects* for further analysis of this trend.

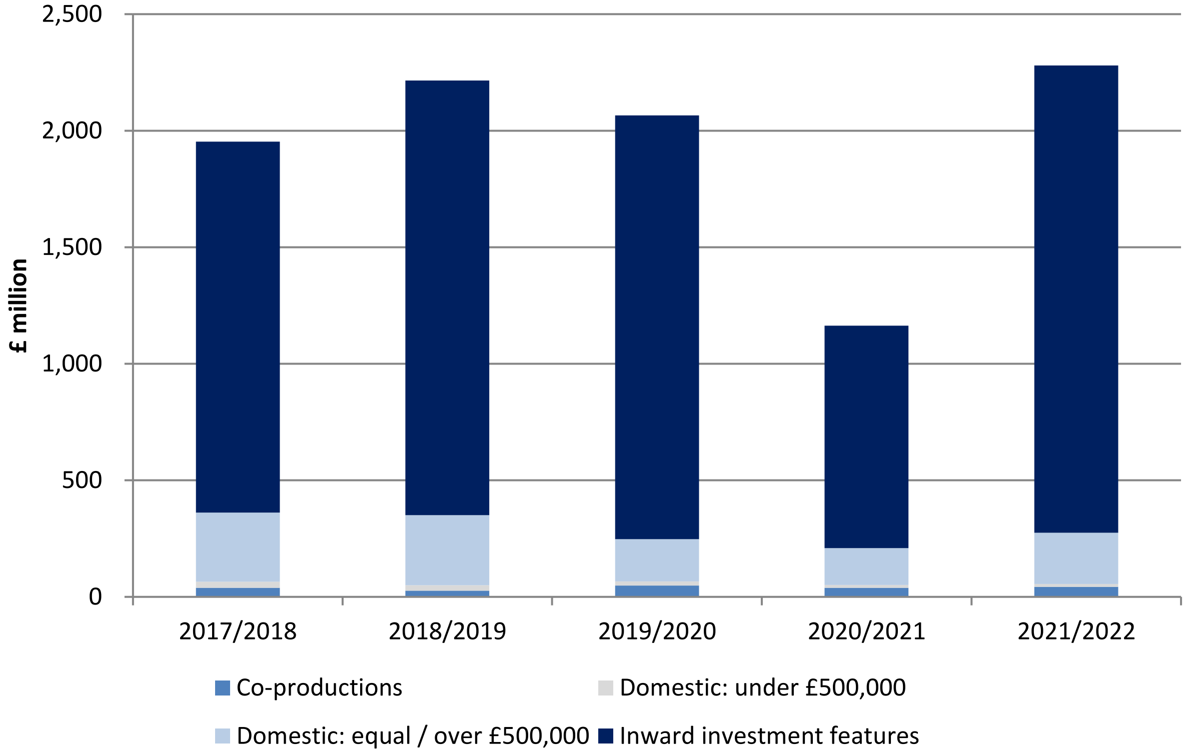
The total UK spend for feature films that started principal photography from April 2021 to March 2022 was £2.3 billion, this is the highest for a rolling year April-March since records began in 2002.
Inward investment productions contributed £2.0 billion (88%) of the total in the rolling year April 2021- March 2022, domestic UK films accounted for £231 million (10%), and co-productions was £44 million (2%).

Table 2 – UK spend (£ million) of features produced in the UK, rolling years: April to March

	Rolling years: April-March £m				
	2017/18	**2018/19**	**2019/20**	**2020/21**	**2021/22**
Co-productions	38.8	27.0	48.0	39.3	43.5
Domestic UK features	322.8	324.2	199.4	169.8	231.2
Of which budget ≥ £500,000	*296.1*	*300.8*	*180.6*	*157.7*	*219.9*
Of which budget < £500,000	*26.7*	*23.4*	*18.8*	*12.0*	*11.3*
Inward investment features	1,591.8	1,864.6	1,817.9	954.0	2,004.7
Total without films with budgets <£500,000*	**1,925.2**	**2,190.6**	**2,045.3**	**1,149.5**	**2,267.5**
Total	**1,953.4**	**2,215.7**	**2,065.3**	**1,163.0**	**2,279.4**

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
Films are allocated to the calendar year in which principal photography started.
Inward investment features includes production which have done VFX work only
*This refers to all films with a production spend <£500,000 in the UK, not just domestic UK features
The tables include data adjustment on previous releases, due to intervening period production tracking updates.
Films at all budget levels are included in this analysis.

Figure 1 – UK spend (millions) of features produced in the UK, rolling years: April to March



Source: BFI

The number of films which started production last year is the lowest reported for a rolling 12 month period (Table 3 and Figure 2), however, this statistic is likely to be revised upwards in future because there is a lag in obtaining complete data for domestic UK features with a budget of less than £500,000.

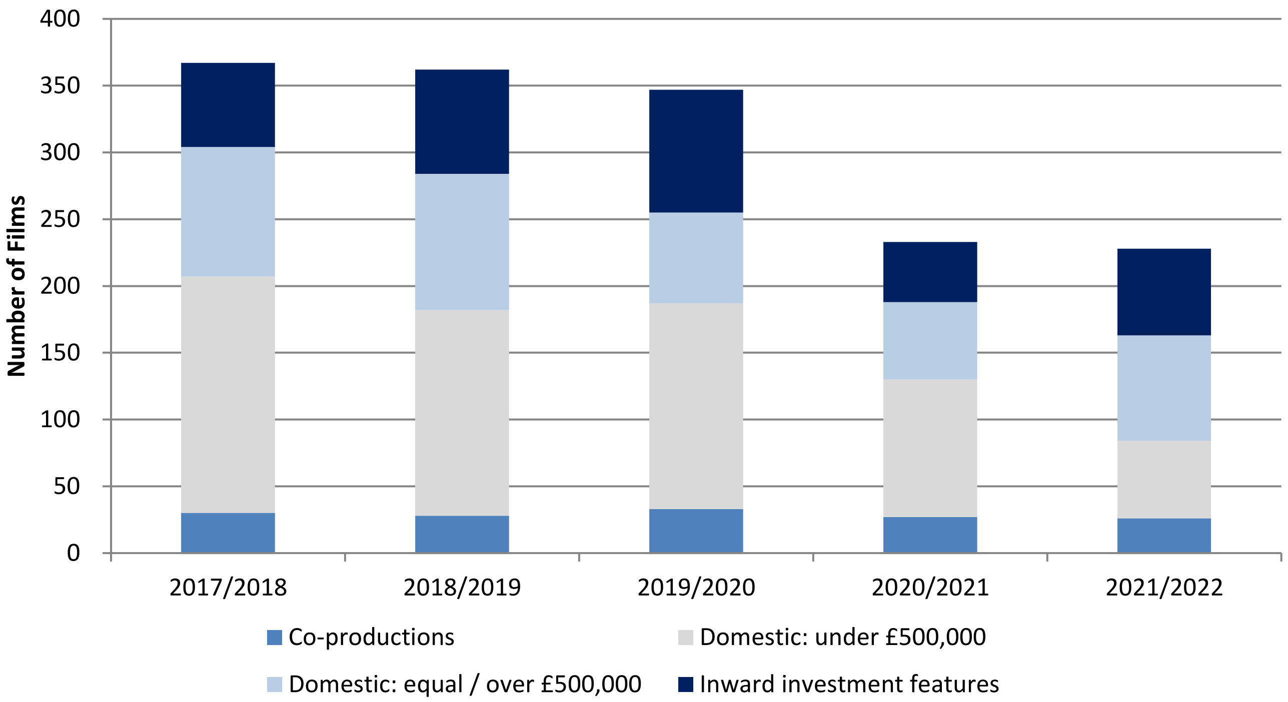
For comparison the number of films reported in the equivalent Statistical Bulletin last year (Film and other screen sectors production in the UK: Full Year 2021) was 145 films, now revised upwards to 233. It is likely that the current 12 month rolling total of 228 films will also be revised upwards, therefore these provisional figures should not be assumed to be direct evidence of a decline in the production of domestic features in the UK. Please see the Appendix B for a more detailed comparison.

Table 3 – Number of film features produced in the UK, rolling years, April to March

	Rolling years: April-March £m				
	2017/18	**2018/19**	**2019/20**	**2020/21**	**2021/22**
Co-productions	30	28	33	27	26
Domestic UK features	274	256	222	161	137
Of which budget ≥ £500,000	97	102	68	58	79
Of which budget < £500,000	177	154	154	103	58
Inward investment features	63	78	92	45	65
Total without films with budgets <£500,000*	**179**	**198**	**182**	**123**	**167**
Total	**367**	**362**	**347**	**233**	**228**

See notes to Table 1.

Figure 2 – Number of features produced in the UK, rolling years, April to March



Source: BFI
Films are allocated to the calendar year in which principal photography commenced.
* The low numbers for domestic productions with budgets under £500,000 is partially attributable to a time lag in obtaining complete information on all low and micro-budget activity in the UK.

As is customary with official statistics releases, the number of productions starting and the production spend figures should be treated as provisional. They are likely to see some increases, regardless of the highly atypical production period. These revisions are due to the time lag in obtaining finalised, detailed information on production activity in the UK, notably for lower and micro budget film features (see Appendix B for detail). The data included in the tables in this release for previous years reflects updated production spend and volume totals.

1.1 Single Episode HETV projects

How productions apply for Certification in the UK needs to be taken into account in reading the production spend and volume of project official statistics. Streaming platforms, such as Netflix, Amazon, Disney+ and Apple TV have been increasingly investing in single productions which are made and could be described as 'films' as well as investing in episodic series. Spend data on productions made by the streaming platforms is contained within the high-end television statistics as those productions apply for certification through the HETV tax relief scheme as long-form single episode projects.

The data shows a considerable growth in long-form single episode productions. Tables 4 and 5 show the effect on the volume of production and spend if these projects are moved from the HETV category to the film category.

In the 12 months April 2021 – March 2022 there were 41 long-form HETV productions, which is the highest figure recorded, by a large margin. The adjusted number of films is increased to 269, which would be the highest number of films as reported at the end of Q1.

The 41 long-form single episode HETV projects had a combined UK spend of £1.1 billion; this increases the film spend by 49% to £3.4 billion, the highest film figure on record by a considerable margin, being more than £1 billion more than the previous adjusted high of £2.4 billion in 2019/2020.

This adjustment would mean that UK spend on film was higher than on HETV, however it should also be noted that the adjusted HETV figures for the number of projects and UK spend (ie without long-form HETV productions), would still be the highest reported by a large margin since the introduction of the HETV tax relief in 2013.

Table 4– Number of projects produced in the UK, adjusted to include long-form 'single' HETV productions

	Rolling Years: Apr-March £m				
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022
Unadjusted Film	367	362	347	233	228
Unadjusted HETV	118	159	154	135	220
Long-form HETV	18	15	21	22	41
Adjusted Film + long-form HETV	385	377	368	255	269
Adjusted HETV – long-form	100	144	133	113	179

See notes to Table 1.

Table 5– UK spend of projects produced in the UK, adjusted to include long form HETV with Film (£m)

	Rolling Years: Apr-March £m				
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022
Unadjusted Film	1,953	2,216	2,065	1,163	2,279
Unadjusted HETV	1,248	1,581	2,167	2,057	4,327
Long-form HETV	119	40	297	224	1,116
Adjusted Film + long-form HETV	2,072	2,256	2,362	1,387	3,396
Adjusted HETV – long-form	1,130	1,541	1,870	1,833	3,211

See notes to Table 1.

In October 2021 the Government announced that film productions qualifying for the Film Tax Relief (FTR), that change during production to instead meet the criteria for High-end Television Tax Relief (HETV), will be able to continue claiming the FTR without losing their right to access tax relief which will benefit film productions in the longer term. For the purpose of analysing the 2021/2022 production statistics, it is not likely that this change will have impacted the production statistics.

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2. High-end television

Total UK spend on HETV programming starting principal photography during Q1 2022 was £999 million from 50 productions (Table 6). This is largest number of productions and UK spend seen in any Q1 since the introduction of the tax relief in 2013.

The UK spend figure for Q1 2022 is an increase from £778 million from 40 projects reported in Q1 2021. Inward investment and co-production account for 83% of the total spend and 56% of the number of programmes.

Inward investment HETV productions starting principal photography in Q1 2022 included *Damage, Flatshare, The Full Monty, Outlander Season 7* and *Ted Lasso Series 3.*

Domestic HETV productions starting included *Best Interests, Better, Bloodlands Series 2, Doc Martin Series 10, Stonehouse, The Pact II* and *Waterloo Road Series 11*

Table 6 – Number and UK spend of high-end television programmes, Q1 2022

	UK spend £ million	Number of programmes
Domestic UK	168.0	22
Inward investment and co-productions	831.1	28
Total	999.2	50

Source: BFI
Data are rounded to the nearest £0.1m so may not sum exactly to the totals shown.
Inward investment features include production which have done VFX work only
HETV are allocated to the calendar quarter in which principal photography started. Totals may not sum due to rounding.

Table 7 and Figure 2 show the HETV spend for the rolling years April- March across years 2017 to 2022. In the latest year April 2021 – March 2022, UK spend was £4.33 billion, the highest level by a substantial margin for any 12 month period since the introduction of the tax relief. It is 110% higher than the previous 12 month period and 99% higher than the pre-pandemic record high of £2.17 billion reported for 2019/2020.

Inward investment and co-productions are combined for disclosure reasons due to the small number of co-productions. They accounted for 84% of the UK spend for HETV productions in 2021/2022. This £3.63 billion spend was, by a considerable amount, the highest recorded UK spend more than double the previous high of £1.75 billion in the pre-pandemic rolling year of 2019/2020.

The UK spend of domestic HETV productions was £697 million or 16% of the total spend. As with reported inward investment figures, these are the highest on record, and are a 41% increase on the previous high of £492 million in 2017/2018.

Table 7 – UK spend (£ million) of high-end television programmes produced in the UK, rolling years: April to March

	Rolling years: April-March £m				
	2017/2018	**2018/2019**	**2019/2020**	**2020/2021**	**2021/2022**
Domestic UK	382.0	492.1	412.8	427.3	696.5
Inward investment and co-productions	866.4	1,088.8	1,754.7	1,629.9	3,630.4
Total	**1,248.4**	**1,580.9**	**2,167.5**	**2,057.2**	**4,326.9**

Source: BFI
Co-production and inward investment have been combined to avoid disclosing budget data for individual titles.
HETV are allocated to the period according to the date principal photography started.
Inward investment include production which have done VFX work only. The tables include data adjustment on previous releases, due to intervening period production tracking updates.

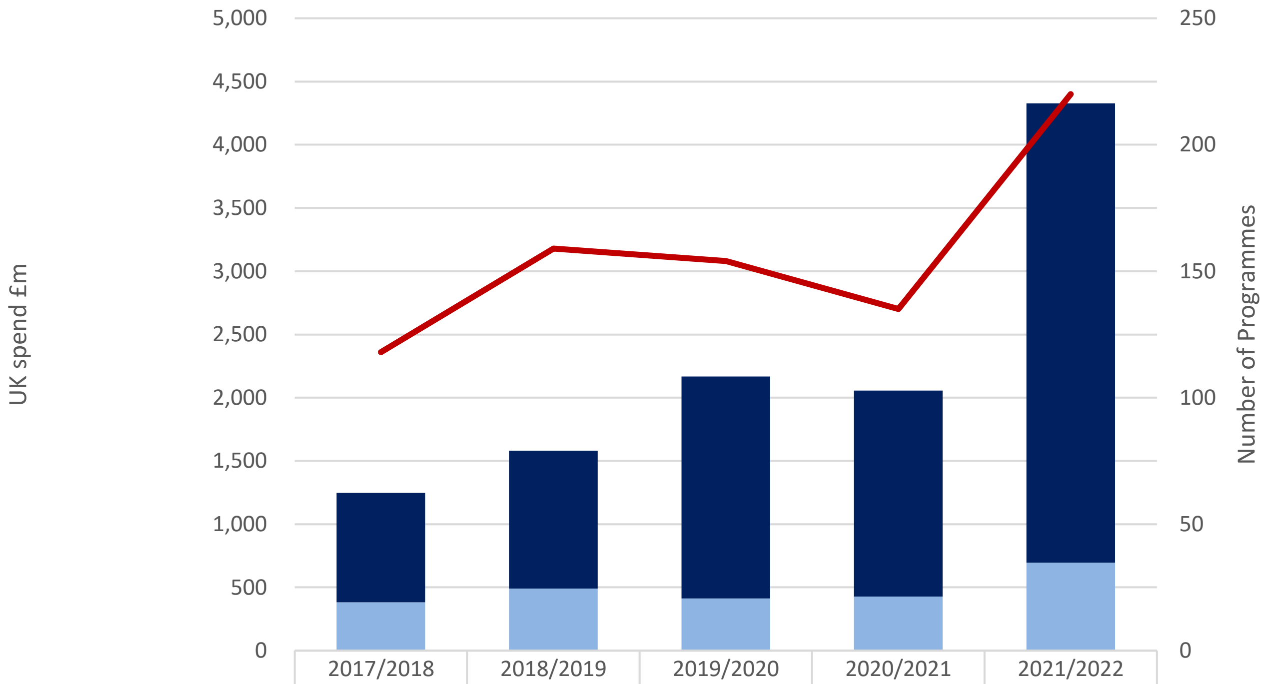
Of the 220 HETV productions which started principal photography in April 2021 – March 2022, 55% were inward investment or co-productions, and 45% were domestic projects (Table 10). The 100 domestic productions represents the highest number of productions since the introduction of the tax relief (the previous high was in 2018/2019 when there were 75 domestic HETV productions). The 120 inward investment and co-productions is substantially larger than any previous 12 month period surpassing the 93 recorded in 2019/2020.

Table 8 – Number of high-end television programmes produced in the UK, rolling years: April to March

	Rolling years: April-March				
	2017/2018	**2018/2019**	**2019/2020**	**2020/2021**	**2021/2022**
Domestic UK	59	75	61	57	100
Inward investment and co-productions	59	84	93	78	120
Total	**118**	**159**	**154**	**135**	**220**

Source: BFI
See note to Table 7

Figure 3 – UK spend and number of high-end television programmes produced in the UK, rolling years April to March 2017-2022



	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022
Inward and Co-Pro	866.4	1,088.8	1,754.7	1,629.9	3,630.4
Domestic UK	382.0	492.1	412.8	427.3	696.5
Number Programmes	118	159	154	135	220

Source: BFI
See note to Table 7

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Appendix A – Production statistics time-lag reporting

As described in the main body of the report, there is always a time-lag with the availability of data affecting the reporting of all production spend figures, particularly for film production. This lag means that there is a risk of misinterpreting trends for the current year when directly compared with the previous year due to the subsequent updates for 2019 / 2020 and earlier.

For years prior to 2021/2022 the tables and figures in these statistical releases includes data which is refreshed as additional and more detailed information becomes available, meaning that additional projects are identified for previous years. Apparent trends should therefore be interpreted with the understanding that the latest reported data will always be updated subsequently.

The impact of having full trend information is demonstrated by Table A1 and Figure A1 below.

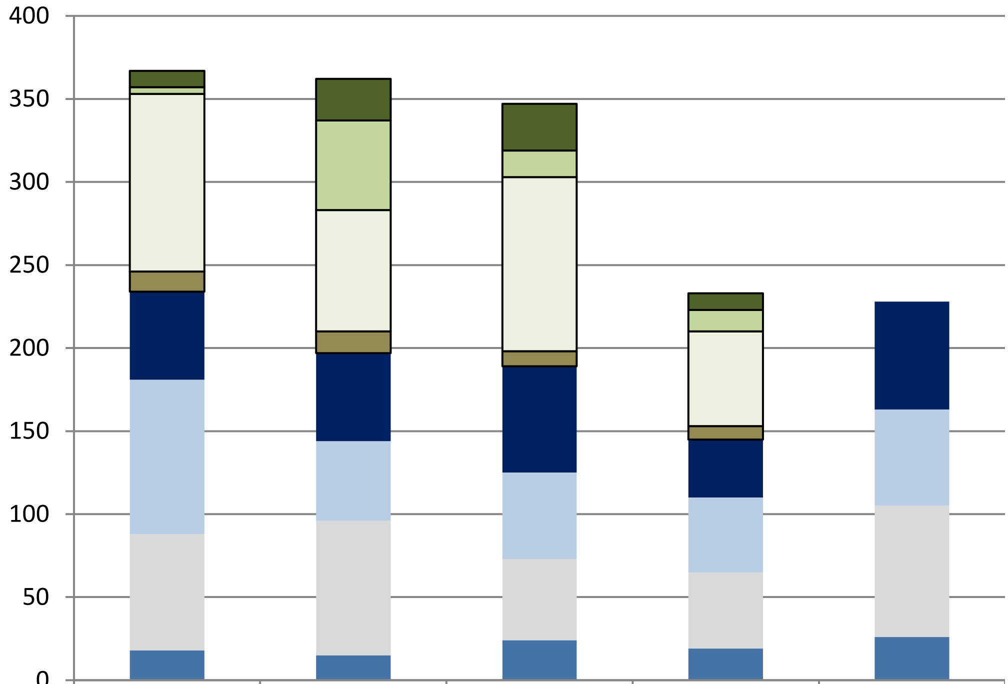
Table A1 below shows data for calendar years as published at the time of release, i.e. at the end the calendar year these were the numbers of films reported and published in the official statistical release at that time. This allows a real-time direct comparison of the slate of films starting principal photography in each year, year-on-year.
It shows that the most recent 12 month period is actually the second highest of the last 5 rolling years when compared to the data as published at the end of Q1 in each year.
When looking at data from previous years we see approximately a 45% increase in the number of films from when it is first published to when it is fully consolidated, approximately 18 months later.

Table A1– Number of features produced in the UK, 2017/2018–2021/2022 as published in the Q1 statistics of that year

	12 months April-March				
	2017/18	**2018/19**	**2019/20**	**2020/21**	**2020/21**
Co-productions	18	15	24	19	26
Domestic UK features	163	129	101	91	137
Of which budget ≥ £500,000`	*70*	*81*	*49*	*46*	*79*
Of which budget < £500,000	*93*	*48*	*52*	*45*	*58*
Inward investment features	53	53	64	35	65
Total	**234**	**197**	**189**	**145**	**228**

Figure A1 displays the reported numbers from Table A1 – the base data – in solid colours with the addition of production data, which has been subsequently updated shown in the pattered colours, therefore showing the full slate of films in production as reported in Figure 2 of this release. This aims to show the effect of the time-lag in obtaining complete data, and how the data in this report for 2021 will likely increase as more data become available.

Figure A1 - Number of features produced in the UK, as published and with additional 2017–2021



	2017/18	2018/19	2019/20	2020/21	2020/21
Additional Inward inv.	10	25	28	10	-
Additional Dom. over £500,000	4	54	16	13	-
Additional Dom. under £500,000	107	73	105	57	-
Additional Co-pro.	12	13	9	8	-
Inward investment features	53	53	64	35	65
Domestic over £500,000	93	48	52	45	58
Domestic under £500,000	70	81	49	46	79
Co-productions	18	15	24	19	26

Source: BFI
Films are allocated to the calendar quarter in which principal photography started.

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Notes

1. BFI Research and Statistics Unit production tracking

The Research and Statistics Unit production tracking system attempts to track all films produced in whole or part in the UK (i.e. it is a census, not a sample).

Sources of information include the British Film Commission, National and Regional screen agencies, industry tracking databases and forums, trade press and internet sources, UK certification data and direct approaches to producers.

Only productions with some UK spend on shooting, visual effects or post-production are included.

Spend is allocated to the calendar year, half year and quarter in which principal photography starts.

2. Revisions
Production tracking is a continuous process and numbers are updated each quarter to reflect newly tracked films, updated budget or UK spend information and postponements or cancellations. Adjustments apply to previous periods as well as to the most recent reported period. The tables in this report contain revised data.

3. Definitions

A **domestic** (indigenous) UK production is a feature film, HETV programme or television animation programme made by a UK production company that is produced wholly or partly in the UK.

A **UK co-production** is a co-production (other than an inward co-production) feature film, HETV programme or television programme involving the UK and other country partners usually under the terms of a bilateral co-production agreement or the European Convention on Cinematographic Co-production.

An **inward investment production** is a feature film, HETV programme or television animation programme which is substantially financed and controlled from outside the UK, where the production is attracted to the UK because of script requirements, the UK's infrastructure or UK tax reliefs. Many (but not all) inward productions are UK films, HETV programmes or animation programmes by virtue of their UK cultural content and the fact that they pass the cultural test administered by the BFI Certification Unit on behalf of the Secretary of State for Culture, Media and Sport.

An **inward feature co-production** is an official co-production that originates from outside the co-production treaty countries (usually from the USA) and which is attracted to the UK because of script requirements, the UK's infrastructure or UK film tax relief.

A **VFX-only film** is a film that has a substantial quantity of digital visual effects made in the UK at one of the UK's main VFX houses but no other UK spend.

A **UK film** is a film that has been certified as British by the DCMS or by the Certification Unit of the BFI (acting on the authority of the Secretary of State for Digital, Culture, Media and Sport) or which is a *de facto* UK film by virtue of being made in whole or part in the UK by a UK production company.

A **US studio film** is a film that is produced in whole or part by one of the major US studios or one of the major US studios' specialist subsidiaries.

An **independent film** is a film made by an independent production company or group of independent production companies.

US studio films are generally distributed in most territories by the parent studio. Independent films are usually distributed by different distributors in different territories.

4. Disclosing individual film information

Spend data are not disclosed when the number of productions (co-production, domestic or inward) is lower than three.

5. Feedback

We welcome feedback from users of our statistics releases to help us improve what we do. If you have any feedback on these statistics or if you wish to make a complaint, in the first instance please contact us using the named contact details listed below

6. Statistical contact details

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