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About the Research and Statistics Unit

The RSU provides research data and market intelligence to anyone with an interest in the UK film industry and UK film culture. No part of this publication may be reproduced without written consent of the authors. We acknowledge the kind permission of the copyright owners to use their data in this Bulletin.

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You can contact us at this address:
Research and Statistics Unit, UK Film Council, 10 Little Portland Street, London W1W 7JG
rsu@ukfilmcouncil.org.uk

Introduction

This issue of the UK Film Council Research & Statistics Bulletin reports figures for box office performance, film production and film on TV in 2004, as well as the key findings of the UK Film Council's survey of film society activity.

The fact that 2004 saw higher admissions and total box office gross than the previous year but a decline in UK production activity reminds us that different sectors of the film industry are subject to quite different forces and challenges at any one time.

The strong audience demand of recent years for film product in the UK (as reported in section 1) does not necessarily equate with increased UK production activity (section 2). In the global economy film can be produced and supplied from any quarter and the challenge for the UK production sector is to remain a destination of choice for inward investment while also nurturing home-grown production that satisfies the growth in audience demand.

That said, we should not forget that 2003 was exceptional for UK production and the figures reported for 2004 remain strong in comparison with other years.

In section 3 we take our regular look at film on UK television, and the overall picture is mixed. In November 2004 we reported signs of improvement for UK films on television in the first half of 2004. By the end of the year the general picture was less rosy, with a fall of 1.7% across the five terrestrial channels. The BBC alone bucked the trend and increased its provision of UK films. The share of recent UK films rose from 2.8% in 2003 to 5.3% across all terrestrial channels in 2004, which is to be welcomed.

The Bulletin closes in section 4 with a summary of findings from a UK Film Council survey of film society activity in the UK, providing a snapshot of this vibrant sector of the UK film landscape. It is an area that is often overlooked in analyses of film viewing in the UK, and only by understanding what is happening on the ground can appropriate strategies to support film society activity be developed and, once established, assessed.

If you have any comments about the Bulletin or any of the data presented, please contact the Research & Statistics Unit.

About the UK Film Council

The UK Film Council was established by the Government in 2000 as the lead agency for film in the UK ensuring that the economic, cultural and educational aspects of film are effectively represented at home and abroad.

We support:

Creativity - encouraging the development of new talent, skills and creative and technological innovation in UK film, and assisting new and established filmmakers to produce successful and distinctive British films.

Enterprise - supporting the creation and growth of sustainable businesses in the film sector, providing access to finance and helping the UK film industry compete successfully in the domestic and global marketplace.

Imagination - promoting education and an appreciation and enjoyment of cinema by giving UK audiences access to the widest range of UK and international cinema, and by supporting film culture and heritage.

1. UK admissions and box office gross in 2004

As predicted, admissions in 2004 topped those of 2003, rising by 2.4% to 171.3 million. The strong boost to admissions over the summer, with rises of 56% and 48% in June and July over the same months in the previous year, helped to offset poorer year end performance. The monthly breakdown is given in Tables 1.1 to 1.3.

Table 1.1: Monthly admissions in 2004

Month	2003 (million)	2004 (million)	% +/- on 2003
January	16.3	15.3	-6.1
February	15.0	13.3	-11.3
March	10.4	10.7	2.9
April	12.4	14.5	16.9
May	13.8	13.1	-5.1
June	9.4	14.7	56.4
July	12.4	18.4	48.4
August	17.1	17.4	1.8
September	10.7	10.2	-4.7
October	17.3	14.5	-16.2
November	13.7	14.6	6.6
December	18.8	14.6	-22.3
Total	167.3	171.3	2.4

Source: CAA, Nielsen EDI

Table 1.2: Average weekly admissions in 2004

Month	2003 weekly average (million)	2004 weekly average (million)
January	3.7	3.5
February	3.8	3.2
March	2.4	2.4
April	2.9	3.4
May	3.1	3.0
June	2.2	3.4
July	2.8	4.2
August	3.8	3.9
September	2.5	2.4
October	4.0	3.3
November	3.2	3.4
December	4.2	3.3

Source: CAA, Nielsen EDI

Table 1.3: Monthly admissions, 2000 to 2004

Month	2000 (million)	2001 (million)	2002 (million)	2003 (million)	2004 (million)
January	10.6	11.6	15.0	16.3	15.3
February	17.6	13.8	19.0	15.0	13.3
March	10.7	10.0	14.3	10.4	10.7
April	13.0	14.0	13.2	12.4	14.5
May	11.3	11.6	14.0	13.8	13.1
June	7.7	9.4	12.2	9.4	14.7
July	14.1	13.8	15.0	12.4	18.4
August	13.5	18.1	15.9	17.1	17.4
September	9.4	10.6	10.6	10.7	10.2
October	14.0	13.4	13.4	17.3	14.5
November	9.2	14.7	16.5	13.7	14.6
December	11.2	14.8	16.9	18.8	14.6

Source: CAA, Nielsen EDI

The pattern of regional admissions remains largely unchanged from the previous year (Table 1.4). The London, Midlands and Lancashire TV regions typically account for half of all UK admissions (having high urban population densities).

Table 1.4: Cinema admissions by TV region in 2004

Region	Admissions	%
London	44,167,622	25.8
Midlands	23,815,122	13.9
Lancashire	18,510,635	10.8
Southern	16,049,695	9.4
Yorkshire	14,000,843	8.2
Central Scotland	11,877,406	6.9
East of England	11,177,253	6.5
Wales & West	11,062,140	6.5
North East	6,333,938	3.7
Northern Ireland	5,387,965	3.1
South West	3,771,656	2.2
Northern Scotland	3,430,244	2.0
Border	1,667,547	1.0
Total	171,252,066	100.0

Source: CAA, Nielsen EDI

The total box office gross in 2004 saw a rise over the previous year similar to that of admissions according to Nielsen EDI. The UK and Ireland box office gross stood at £848,961,446, an increase of 4.9% on 2003 (£809,483,203).

Table 1.5 lists the top 20 performers by box office gross in 2004. Sequels take the top three places in the chart. *Shrek 2* heads the list with a gross of £48.1m, followed by the third film in the Harry Potter franchise (*Harry Potter and the Prisoner of Azkaban*) and that other successful literary franchise *Bridget Jones: Edge of Reason*. In all there are six sequels in the chart, with *Spider-Man 2*, *Scooby Doo Too* and *The Bourne Supremacy* building on previous success. There are three UK films in the top 20, all collaborations with US studios. As with last year’s chart, all top 20 films have some kind of US involvement.

Table 1.5: Box office results for the top 20 films released in the UK in 2004

	Title	Country of origin	Box office gross (£m)	Number of opening cinemas	Opening weekend gross (£m)	Distributor
1	Shrek 2	USA	48.10	512	16.22	UIP
2	Harry Potter and the Prisoner of Azkaban	UK/USA	46.08	535	23.88	Warner Bros
3	Bridget Jones: The Edge of Reason	UK/USA	36.00	504	10.44	UIP
4	*The Incredibles	USA	32.04	**494	**9.75	Buena Vista
5	Spider-Man 2	USA	26.72	504	8.77	Sony Pictures
6	The Day After Tomorrow	USA	25.21	429	7.32	20th Fox
7	Shark Tale	USA	22.82	504	7.55	UIP
8	Troy	UK/USA/Mal	18.00	**504	**6.02	Warner Bros
9	I, Robot	USA	17.98	447	4.75	20th Fox
10	Scooby-Doo Too	USA	16.49	489	3.55	Warner Bros
11	Van Helsing	USA	15.15	458	5.43	UIP
12	*Lemony Snicket's A Series of Unfortunate Events	USA	13.11	452	2.21	UIP
13	Starsky & Hutch	USA	12.60	81	0.41	Buena Vista
14	The Last Samurai	USA/Jap/NZ	11.90	430	2.72	Warner Bros
15	The Bourne Supremacy	USA/Ger	11.56	418	2.72	UIP
16	The Passion of the Christ	USA	11.08	46	0.23	Icon
17	School of Rock	USA/Ger	10.50	376	2.74	UIP
18	The Village	USA	10.31	433	2.95	Buena Vista
19	Lost in Translation	USA/Jap	10.06	96	0.80	Momentum
20	Dodge Ball: A True Underdog Story	USA	10.03	315	2.20	20th Fox

Source: Nielsen EDI, RSU analysis

Box office gross = cumulative total up to 6 February 2005

Films with an asterisk (*) were still being exhibited on 6 February 2005

Films with double asterisk (**) are shown with weekend figures corresponding to the first weekend of wide release, rather than opening weekend.

Table 1.6 focuses on the performance of top UK films at the box office. The total box office gross of the top 20 UK films was £176.18 million, compared with £121.63 in 2003, a rise of 45%. This is partly due to an increase in the number of UK films making between £3 million and £6 million box office gross (up from 4 in 2003 to 9 in 2004) ensuring the top 20 is less starkly polarised than in 2003.

Table 1.6: Top 20 UK films released in the UK in 2004

	Title	Country of origin	Box office gross (£m)	Distributor
1	Harry Potter and the Prisoner of Azkaban	UK/USA	46.08	Warner Bros
2	Bridget Jones: The Edge of Reason	UK/USA	36.00	UIP
3	Troy	UK/USA/Mal	18.00	Warner Bros
4	*Phantom of the Opera	UK/USA	8.90	Entertainment
5	Wimbledon	UK/USA	7.17	UIP
6	King Arthur	UK/USA/Ire	7.07	Buena Vista
7	Shaun of the Dead	UK	6.69	UIP
8	Thunderbirds	UK/USA	5.43	UIP
9	Bride and Prejudice	UK/USA	5.17	Pathé
10	Alien Vs. Predator	UK/Cze/Can/Ger	5.15	20th Fox
11	Alfie	UK/USA	4.71	UIP
12	Layer Cake	UK	4.45	Sony Pictures
13	Around the World in 80 days	UK/USA/Ger/Ire	4.15	Entertainment
14	Girl with a Pearl Earring	UK/Lux	3.84	Pathé
15	*Finding Neverland	UK/USA	3.54	Buena Vista
16	Ladies in Lavender	UK	3.16	Entertainment
17	Resident Evil:Apocalypse	UK/Ger/Fra/Can	1.97	Sony Pictures
18	Tooth	UK	1.68	Redbus
19	5 Children & It	UK	1.57	Pathé
20	Man About Dog	UK/Ire	1.45	Redbus

Source: Nielsen EDI, RSU analysis

Box office gross = cumulative total up to 6 February 2005

Films with an asterisk (*) were still being exhibited on 6 February 2005

2. UK film production in 2004

2.1 The value of UK production in 2004

UK Production activity eased back to £808 million in 2004 from 2003's particularly high level of £1,158 million.

There were 20 inward investment productions in 2004, with a UK production value of £549 million (see Table 2.1 for definitions). Big budget films contributing to this figure were: *Harry Potter and the Goblet of Fire*, *Batman Begins*, *Charlie and the Chocolate Factory* and the *Hitchhiker's Guide to the Galaxy*. The high international visibility of these titles illustrates the continuing importance of UK film production in the global film industry.

There were 27 domestic features in 2004 to a value of £118 million. Larger budget films contributing to this total included *Nanny McPhee*, *Pride and Prejudice*, *Mrs Henderson Presents*, *The Dark* and *The Adventures of Greyfriars Bobby*.

UK co-productions (other than inward) fell from 99 to 85, with UK spend dropping from £159 million to £142 million. Films in this category included *Oliver Twist*, *Man to Man*, *Somebody Loves You*, *Merry Christmas* and *Hotel Rwanda*.

Table 2.1 Feature film production activity in 2003 and 2004

	Number of Productions 2003	Value £m 2003	Number of productions 2004	Value £m 2004
Inward feature films (single country)	17	409.7	17	476.9
Inward feature films (co-productions)	13	319.9	3	71.6
Total inward investment	30	729.5	20	548.5
Domestic UK feature films	44	269.3	27	117.8
UK co-productions (other than inward)	99	158.9	85	141.6
Total production investment	173	1,157.7	132	807.9

Source: UK Film Council International. Figures correct up 18 February 2005.

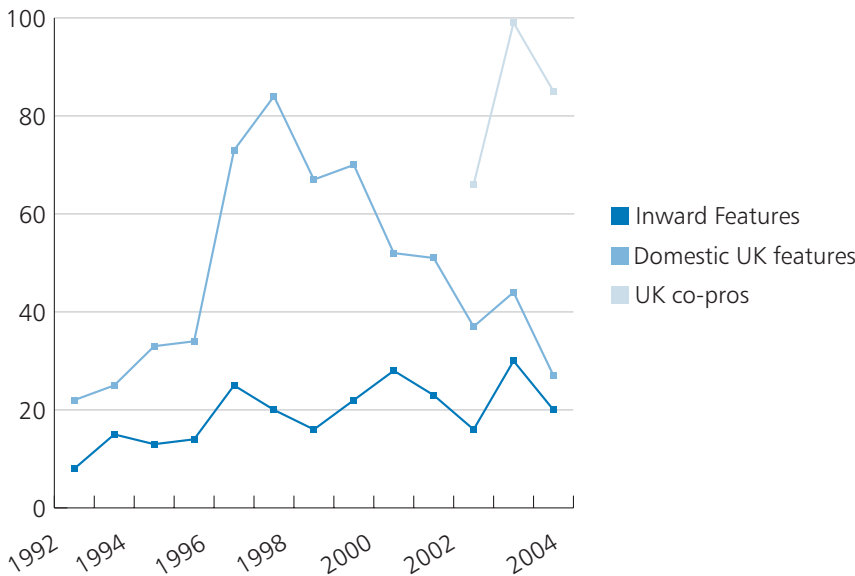
Notes

1. An inward feature is defined as a feature film more than 50% financed from outside the UK where the production is location non-specific or is attracted to the UK because of its infrastructure
2. 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 its infrastructure.
3. A domestic UK feature is a feature made by a UK production company that is shot wholly or partly in the UK.
4. A UK co-production is a co-production (other than an inward co-production) involving the UK and other country partners under the terms of a bilateral co-production agreement or the European Co-production Convention.
5. The total budget is counted for all productions which are likely to qualify as British under Schedule 1 of the Films Act 1985.
6. Only UK spend is counted for co-productions.
7. Spend is allocated to the year in which principal photography started.
8. The provision of UK production and post-production services to films other than those identified in Table 2.1 is not included.
9. Spending on films with budgets under £500,000 is not included.

2.2 Inward, domestic and UK co-production features 1992 to 2004

Figure 2.1 puts the figures in a longer time perspective. The decline in domestic features since 1997 has occurred alongside a substantial growth in co-production activity, suggesting it is easier to make films as official co-productions than as stand-alone UK productions. Inward features, while fewer in 2004 than in 2003, show a decade-long upward trend. When co-productions are included, the 2004 total was the second highest annual total for the 1992 to 2004 period.

Figure 2.1 Number of inward, domestic and UK co-production features, 1992-2004

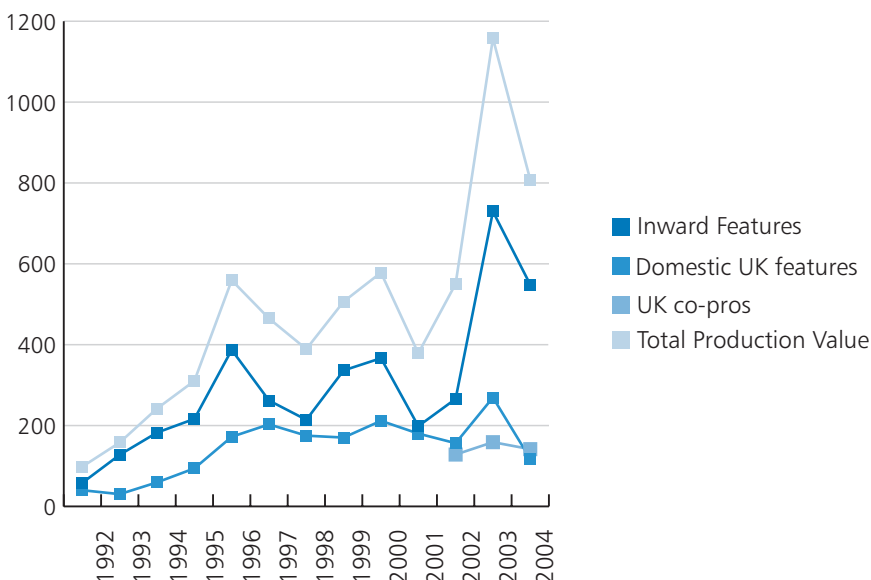


Source: UK Film Council International

Note: 'Inward features' includes inward investment co-productions from 2002.

The value of UK production in 2004 was significantly lower than 2003, but was still the second highest annual level for the period 1992-2004 (Figure 2.2). Since 1997, the increase in production value has been driven by inward features and UK co-productions, with the value of domestic features staying roughly level from 1997 to 2003 and dipping in 2004.

Figure 2.2 Value of inward, domestic, UK co-production and total features 1992-2004



Source: UK Film Council International

Note: For co-productions only UK spend is included.

2.3 Divergent budget trends

Table 2.2 shows a divergence in budget trends in 2004. The median and average budgets for single country inward investment films once again increased strongly, reflecting the global trend towards higher budgets for major productions. On the other hand, the median and average budgets for domestic productions fell. For UK co-productions, there was a significant rise in the median budget but a fall in the average budget, reflecting a fall in the number of higher budget UK co-productions.

Table 2.2 Comparison of median and average budgets, 2002 to 2004

Production category	Median budget £m			Average budget £m		
	2002	2003	2004	2002	2003	2004
Inward features (single country)	6.9	12.1	16.5	17.0	26.5	36.0
Inward features (co-productions)	25.0	46.6	38.1	32.3	51.6	47.4
Domestic UK productions	2.0	3.0	2.9	4.2	6.1	4.4
Co-productions (other than inward)	3.2	3.5	4.4	6.0	5.5	5.3

Source: UK Film Council International, RSU analysis.

Notes

'Average budget' is the arithmetical mean (ie total budget divided by total number of films in the category).

'Median budget' is the middle value (ie there are equal numbers of films above and below the median budget).

Where the average is higher than the median (as it is with all the categories in Table 2.2) this indicates that the average has been skewed upwards by a relatively small number of high budget films.

2.4 Size distribution of budgets

The size distribution of the budgets for the four categories of film is shown in Tables 2.3 to 2.6. Six features with budgets of over £30 million accounted for 79.2% of the aggregate budget for inward features (single country). Only five out of 17 features had budgets of less than £10 million.

Table 2.3 Size distribution of budgets, inward features (single country) in 2004

Budget band (£m)	Number	Total Budget in band (£m)	% of total budget
£30m+	6	485.1	79.2
£10-£30m	6	98.9	16.1
Under £10m	5	28.4	4.6
Total	17	612.4	100.0

Source: UK Film Council International, RSU analysis.

All the inward features (co-productions) had budgets of £10 million or more. For confidentiality reasons, because of the small number of productions in this category, the results for the £10-£30 million and £30 million plus categories cannot be shown separately.

Table 2.4 Size distribution of budgets, inward features (co-productions) in 2004

Budget band (£m)	Number	Total Budget in band (£m)	% of total budget
£10m+	3	142.2	100.0
Under £10m	0	0.0	
Total	3	142.2	100.0

Source: UK Film Council International, RSU analysis.

There were no domestic UK features in 2004 with budgets over £30 million, compared with three with a combined budget of £115 million in 2003. There was also a sharp reduction in the number of films in the £5-£10 million band – only four (ten in 2003), with a combined budget of £23 million (£63 million in 2003).

Table 2.5 Size distribution of budgets, domestic UK features, 2004

Budget band (£m)	Number	Total Budget in band (£m)	% of total budget
£30m+	0	0.0	0.0
£10-£30m	3	44.9	38.2
£5 – 10m	4	23.2	19.7
£2 – 5m	10	34.3	29.1
£0.5 – 2m	10	15.3	13.0
Total	27	117.8	100.0

Source: UK Film Council International, RSU analysis.

Most co-productions (other than inward) were in the budget range £2-£10 million (66 out of 85) accounting for 71% of the combined budget. There were substantially fewer co-productions in the budget bands £10-£30 million and £0.5-£2 million compared with 2003.

Table 2.6 Size distribution of budgets, UK co-productions (other than inward), 2004

Budget band (£m)	Number	Total Budget in band (£m)	% of total budget
£30m+	0	0.0	0.0
£10-£30m	8	113.4	25.2
£5 – 10m	27	195.1	43.4
£2 – 5m	39	124.9	27.8
£0.5 – 2m	11	16.2	3.6
Total	85	449.6	100.0

Source: UK Film Council International, RSU analysis.

2.5 Big budget productions, 2002 to 2004

Table 2.7 shows the increasing polarisation in film budgets. The only category of film with an increase in big budget productions (£30 million+) in 2004 was inward investment. In the other categories there were either no big budget productions or a steep decrease on 2003.

Table 2.7 Films with budgets of £30m+, 2002 to 2004

Category	Number of films with budgets of £30m+			Value of associated UK spend £m		
	2002	2003	2004	2002	2003	2004
Inward (single)	2	4	6	155.5	263.2	485.1
Inward (co-pro)	1	8	n/a	26.1	293.4	n/a
Domestic UK	0	3	0	0	115.0	0
Co-pro (other than inward)	2	0	0	15.0	0	0
Total	5	15	n/a	196.6	671.6	n/a

Source: UK Film Council International, RSU analysis.

Note: n/a indicates a number of films too small to be shown separately for confidentiality reasons.

2.6 UK share of co-production expenditure

Tables 2.8 and 2.9 show the UK expenditure shares by budget band for inward co-productions and co-productions (other than inward) respectively. For inward co-productions the UK expenditure share was relatively high, at around 50%.

Table 2.8 UK expenditure share by budget band, inward co-productions in 2004

Budget band (£m)	Number	Total Budget in band (£m)	UK spend in band £m	UK spend as % of band total
£10m+	3	142.2	71.6	50.3
Under £10m	0	0	0	n/a
Total	3	142.2	71.6	50.3

Source: UK Film Council International, RSU analysis.

For the remaining co-productions (the majority), the UK expenditure share was substantially lower, at 31.5%, as shown in Table 2.9. The highest UK expenditure share was in the £2-£5 million budget band (37.9%).

Table 2.9 UK expenditure share by budget band, co-productions (other than inward) 2003

Budget band (£m)	Number	Total Budget in band (£m)	UK spend in band £m	UK spend as % of band total
£30m+	0	0	0	n/a
£10 – 30m	8	113.4	32.1	28.3
£5 – 10m	27	195.1	57.8	29.6
£2 – 5m	39	124.9	47.3	37.9
£0.5 – 2m	11	16.2	4.3	26.6
Total	85	449.6	141.6	31.5

Source: UK Film Council International, RSU analysis.

2.7 Partners in UK co-productions

Table 2.10 shows a slight increase in 2004 in the proportion of co-productions for which the UK was the major funder (18 out of 85, compared with 18 out of 99 in 2003). There were significant falls in the number of co-productions with France and Canada as the major partners, possibly reflecting a tightening of certification rules in relation to those two countries. There were falls in the number of co-productions with Germany and the Netherlands as the major source of funding, but a rise in the number of co-productions principally funded from Spain.

Table 2.10 UK co-productions, principal country participants, 2003 and 2004

Principal country participant	Number of UK co-productions	
	2003	2004
UK	18	18
France	22	12
Canada	16	8
Denmark	4	5
Ireland	6	5
Spain	1	5
Italy	7	4
Australia	2	3
New Zealand	3	3
Romania	1	3
Germany	7	2
Luxembourg	1	2
Netherlands	5	1
Czech Republic	2	0
South Africa	2	1
Other	2	4
Not available	-	9
Total	99	85

Source: UK Film Council International

Note: "Principal country participant" means the country contributing the largest portion of the film budget, sometimes (but not always) the majority.

2.8 UK co-productions by country of shoot

Table 2.11 shows the shoot locations for UK co-productions (not including inward investment) in 2004. The most frequent locations were in the UK (17 productions), France (8), Spain (8), Canada (6), Luxembourg (6), Germany and Romania (5 each). Some films were shot in more than one country and are therefore counted more than once.

Table 2.11 UK co-productions, country of shoot, 2004

Country	Number of productions
Not available	19
UK	17
France	8
Spain	8
Canada	6
Luxembourg	6
Germany	5
Romania	5
Italy	5
Ireland	4
Australia	4
South Africa	3
New Zealand	3
Denmark	2
Sweden	2
Iceland	2
Isle of Man	2
Others	13

Source: UK Film Council International

Note: Some productions shoot in more than one country, hence the total in Table 2.11 is greater than the number of UK co-productions.

Table 2.12 shows the shoot locations by region for UK co-productions shot abroad between 2002 and 2004. Western Europe (not including the UK) was once again the most frequent destination. The 2003 surge in shoots in Eastern Europe and Russia was not repeated. Significant numbers of co-productions were shot in Australia, New Zealand, South Africa, Central America and the Caribbean.

Table 2.12 Location of shoot by region, UK co-productions shot abroad, 2002 to 2004

Region	Shot abroad in 2002	Shot abroad in 2003	Shot abroad in 2004
Not available	n/a	33	19
Western Europe	30	42	48
North America	15	8	6
South & Central America, Caribbean	4	0	4
Eastern Europe and Russia	4	16	8
Australasia	3	4	7
Asia	1	3	0
Southern Africa	0	5	5

Source: UK Film Council International, RSU analysis

Note: Of the co-productions for which the shoot location is not recorded, some may have been shot in the UK.

3. Film on UK television in 2004

Television is a vital link in the film value chain as it can provide both necessary financing and revenues. Television is also the most accessible medium for film culture, offering people that might not otherwise visit the cinema or watch videos the opportunity to experience and appreciate films.

This section examines the number of films broadcast on UK television in 2004, with a particular focus on the number of UK films shown on television, including a separate assessment of recent UK films made in the last 8 years.

The total number of films broadcast on terrestrial TV in 2004 showed a decrease of 4.4% on 2003, as shown in Table 3.1. The number of films on the BBC channels increased by 11.2% on Two, and slightly (0.4%) on One. The number of films shown on ITV1 fell by almost 13%, whilst Channel 4 figures dropped to the lowest number since 1997 (the first year for which RSU has comprehensive data on televised film).

Table 3.1: Total number of films broadcast on terrestrial TV in 2004

Channel	2003	2004	% change
BBC1	432	434	+0.4
BBC2	448	498	+11.2
ITV1	310	270	-12.9
Channel 4	587	506	-13.8
Five	562	529	-5.9
Total	2339	2237	-4.4

Source: DGA Metrics, BARB

The total number of UK films broadcast by the five terrestrial channels fell by just under 2% on 2003 (Table 3.2). Again, the BBC showed significant gains in this area. The number of UK films on BBC1 increased by almost 40%, and BBC2 by 52%. The number of UK films fell on ITV1 and Five by significant amounts (-39.7% and -26.8% respectively). Channel 4 output of UK film declined by almost 19%, despite the presence of eight recent UK films in the network’s top 20 films of the year (see below).

Table 3.2: Number of UK films broadcast on terrestrial TV in 2004

Channel	2003	2004	% change
BBC1	76	106	+39.5
BBC2	91	138	+51.6
ITV1	73	44	-39.7
Channel 4	222	180	-18.9
Five	56	41	-26.8
Total	518	509	-1.7

Source: DGA Metrics, BARB

In contrast to the general picture for all UK films, the number of recent UK films shown on terrestrial television increased by 83% in 2004 compared with the previous year (Table 3.3). The number of recent British films shown on BBC2 improved by 220%, and on Channel 4 by 120%. ITV1 and Five showed fewer recent British films than the year before. Recent British films shown on BBC2 included *Chocolat*, *Morvern Callar*, *In This World*, *The Claim*, *Pandaemonium*, *Hideous Kinky*, *Onegin*, *Mansfield Park*, *Mrs Brown* and *Nasty Neighbours*. On Channel 4, recent UK films included *Bridget Jones’s Diary*, *The Hole*, *Touching the Void*, *The Parole Officer*, *51st State*, *Beautiful Creatures*, *East is East*, *Little Voice* and *Human Traffic*.

Table 3.3: Number of recent (made within the last 8 years) UK films broadcast in 2004

Channel	2003	2004	% change
BBC1	20	27	+35.0
BBC2	15	48	+220.0
ITV1	12	9	-25.0
Channel 4	15	33	+120.0
Five	3	2	-33.3
Total	65	119	+83.1

Source: DGA Metrics, BARB

Table 3.4 reveals an increase in the total percentage of recent UK films from the 2.8% of 2003, and the content more than doubled on BBC2 and Channel 4. The proportion of recent UK film on BBC1 increased from 4.6% in 2003 to 6.2% in 2004. The share on BBC2 increased from 3.3% to 9.6%. The percentage of recent UK film on Channel 4 also increased to 6.5% from 2.6% in 2003. There was a decline in the proportion of recent UK output on both ITV1 and Five.

Table 3.4: Number of recent UK films as percentage of total films broadcast in 2004

Channel	2003	2004	% change
BBC1	4.6	6.2	+34.8
BBC2	3.3	9.6	+190.9
ITV1	3.9	3.3	-15.4
Channel 4	2.6	6.5	+150.0
Five	0.5	0.4	-20.0
Total	2.8	5.3	+89.3

Source: DGA Metrics, BARB

Table 3.5 shows the time of day in which recent UK films were broadcast during 2004. A peaktime film is one where the midpoint of the film duration falls between the 1800 – 2259 hours. Off-peak is from 2300 – 0559 hours, and Daytime 0600 – 1759 hours. In all, 44% of recent UK titles were broadcast at peaktime. 52% of Channel 4 titles were broadcast at peaktime, with several proving to be ratings successes such as Bridget Jones’s Diary, Notting Hill and The Hole. 44% of recent UK films on BBC1 were shown in the evenings, including the first Harry Potter and Lara Croft films, and the crime thriller Entrapment. Two thirds of ITV1’s output of recent UK films appeared at peaktimes, including three Bond films.

Table 3.5: Recent UK films by daypart

Channel	Recent UK films	Peaktime	Off-peak	Daytime
BBC1	27	12	12	3
BBC2	48	15	30	3
ITV1	9	6	1	2
Channel 4	33	17	15	1
Five	2	2	0	0
Total	119	52	58	9

Source: DGA Metrics, BARB

A total of 1120 hours of film was shown in peak time across the five terrestrial channels during 2004 (Table 3.5). Five broadcast almost 46% of these hours.

Table 3.6: Total number of broadcast hours for film per channel in peak time in 2004

Channel	Hours
BBC1	163
BBC2	133
ITV1	104
Channel 4	207
Five	513
Total	1120

Source: DGA Metrics, BARB

Table 3.7 describes how despite showing the fewest films during peak time hours, the largest average peak time audience for film was on ITV1, with just over 3.2 million viewers.

Table 3.7: Average audience for a peak time film in 2004

Channel	Average audience
BBC1	3,084,585
BBC2	1,508,905
ITV1	3,213,188
Channel 4	1,925,393
Five	1,625,524

Source: DGA Metrics, BARB

Of the top 10 performing films on TV in 2004, six were UK certified productions (Table 3.8). The top film, *Shrek* on BBC1, attracted 9.5 million viewers. Of the six British films, two were Bond films, and two were Working Title productions.

Table 3.8: Top 10 films on network television in 2004

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Shrek	BBC1	USA	2001	9.5
2	What Women Want	BBC1	USA	2000	8.9
3	Unbreakable	ITV1	USA	2000	8.7
4	Harry Potter and the Philosopher's Stone	BBC1	UK/USA	2001	8.4
5	Die Another Day	ITV1	UK/USA	2002	7.5
6	Lara Croft: Tomb Raider	BBC1	UK/USA	2001	7.0
7	About a Boy	ITV1	UK/USA	2002	6.9
8	What Lies Beneath	ITV1	USA	2000	6.8
9	The World is Not Enough	ITV1	UK/USA	1999	6.7
10	Bridget Jones's Diary	Channel 4	UK/USA	2001	6.5

Source: DGA Metrics, BARB

The first film in the *Harry Potter* series was the most watched British film on UK network television in 2004, as shown in Table 3.9. Bond films feature strongly in the list, with three titles, as do films produced by Working Title, also with three titles. All of the top films, except *The Italian Job*, were made in the last eight years.

Table 3.9: Top 10 UK-originated films on network television in 2004

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Harry Potter and the Philosopher's Stone	BBC1	UK/USA	2001	8.4
2	Die Another Day	ITV1	UK/USA	2002	7.5
3	Lara Croft: Tomb Raider	BBC1	UK/USA/Ger	2001	7.0
4	About a Boy	ITV1	UK/USA	2002	6.9
5	The World is Not Enough	ITV1	UK/USA	1999	6.7
6	Bridget Jones's Diary	Channel 4	UK/USA	2001	6.5
7	The Italian Job	BBC1	UK	1969	5.1
8	The Mummy Returns	ITV1	UK/USA	2001	4.9
9	Tomorrow Never Dies	ITV1	UK/USA	1997	4.7
10	Notting Hill	Channel 4	UK/USA	1999	4.3

Source: DGA Metrics, BARB

Tables 3.10 to 3.14 list the top 10 films appearing on each of the five terrestrial channels in 2004. American films dominated every channel's top ten ranking titles, with the exception of BBC2, with five British productions in the top 10. There are three British titles in the Channel 4 top 10, but eight in the top 20. The other five are *Four Weddings and a Funeral* (#11, 3.3m viewers); *Touching the Void* (#12, 3.1m viewers); *East Is East* (#14, 2.9m viewers); *The Parole Officer* (#17, 2.8m viewers); *51st State* (#20, 2.8m viewers).

Table 3.10: Top 10 films on BBC1 in 2004

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Shrek	UK/USA	2001	9.5
2	What Women Want	USA	2000	8.9
3	Harry Potter and the Philosopher's Stone	UK/USA	2001	8.4
4	Lara Croft: Tomb Raider	UK/USA	2001	7.0
5	Robin Hood: Prince of Thieves	USA	1991	6.4
6	The Mummy	USA	1999	6.2
7	Enemy of the State	UK	1998	5.9
8	Raiders of the Lost Ark	UK	1981	5.8
9	Indiana Jones and the Temple of Doom	USA	1984	5.8
10	Indiana Jones and the Last Crusade	UK	1989	5.8

Source: DGA Metrics, BARB

Table 3.11: Top 10 films on BBC2 in 2004

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Chocolat	UK/USA	2000	3.2
2	American Beauty	USA	1999	2.9
3	Mansfield Park	UK/USA	2000	2.6
4	LA Confidential	/USA	1997	2.6
5	Out of Sight	USA	1998	2.5
6	The Pledge	USA	2001	2.5
7	Mosquito Squadron	UK	1968	2.5
8	Mrs Brown	UK	1997	2.4
9	Good Will Hunting	USA	1998	2.3
10	The Man who Never Was	UK	1955	2.2

Source: DGA Metrics, BARB

Table 3.12: Films on ITV1 in 2004

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Unbreakable	USA	2000	8.7
2	Die Another Day	UK/USA	2002	7.5
3	About a Boy	UK/USA	2002	6.9
4	What Lies Beneath	USA	2000	6.8
5	The World is Not Enough	UK/USA	1999	6.7
6	Dr. Dolittle	USA	1998	5.8
7	Pretty Woman	USA	1990	5.8
8	Grease	USA	1978	5.7
9	Jurassic Park III	USA	2001	5.7
10	Mission: Impossible II	USA	2000	5.5

Source: DGA Metrics, BARB

Table 3.13: Films on Channel 4 in 2004

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Bridget Jones's Diary	UK/USA	2001	6.5
2	Gladiator	USA	1992	4.6
3	Notting Hill	UK/USA	1999	4.3
4	Swordfish	USA	2001	3.7
5	Along Came a Spider	UK/USA	2001	3.6
6	Crouching Tiger, Hidden Dragon	Tai/HK/Chi/USA	2000	3.5
7	Crocodile Dundee in LA	USA	2001	3.4
8	The Hole	UK	2001	3.4
9	Sleepy Hollow	USA	2000	3.4
10	The Gift	USA	2000	3.3

Source: DGA Metrics, BARB

Table 3.14: Top 10 films on Five in 2004

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Terminator 3: Rise of the Machines	USA	2003	4.9
2	Miracle on 34th Street	USA	1994	4.2
3	Mercury Rising	USA	1998	3.4
4	Independence Day	USA	1996	3.3
5	The Specialist	USA	1994	3.2
6	Miss Congeniality	USA	2000	3.2
7	Ghost	USA	1990	3.2
8	Charlie's Angels	USA	2000	3.1
9	Armageddon	USA	1998	2.9
10	Legally Blonde	USA	2001	2.8

Source: DGA Metrics, BARB

Cable and satellite TV subscription film channels continue to attract small numbers of viewers at peak times, however the non-subscription channels have started to gain sizeable audiences for film at peak time. Table 3.15 shows that ITV2 and ITV3 were the most popular channels with an average audience of 406,300 and 310,200 for peak time films. The most successful subscription film channels are Sky Movies 1 and 2 attracting an average of between 69,400 and 73,430 for peak time films.

Table 3.15: Average peak time audiences for film channels on cable and satellite TV 2004

Channel	Average peak Audience
ITV2	406,300
ITV3	310,200
BBC3	242,900
Sky One	237,800
UKTV Gold	207,400
E4	135,800
Living	130,500
Living Total	112,200
Sky Mix	78,725
Sci Fi Channel	73,860
Sky Movies 1	73,430
Sky Movies 2	69,400
Hallmark	63,930
BBC4	54,890
The Disney Channel	46,570
Sky Movies 4	38,440
Sky Movies 3	37,700
Sky Movies 8	34,510
Sky Movies 6	34,300
Turner Classic Movies	32,540
Sky Movies 5	31,120
Sky Movies 7	30,230
UKTV Drama	24,850
Sky Movies 9	21,230
Sky Cinema 1	15,100
Sky Movies Active	11,210
The Horror Channel	10,990
Sky Cinema 2	10,370
Film Four	5,324
Film Four Total	3,281
Film Four Weekly	3,279

Cable and satellite TV subscription film channels continue to attract small numbers of viewers at peak times, however the non-subscription channels have started to gain sizeable audiences for film at peak time. Table 3.15 shows that ITV2 and ITV3 were the most popular channels with an average audience of 406,300 and 310,200 for peak time films. The most successful subscription film channels are Sky Movies 1 and 2 attracting an average of between 69,400 and 73,430 for peak time films.

Source: DGA Metrics, BARB

Looking at the top performing titles on multi-channel TV in 2004, all but two of the films listed were shown on the non-subscriber ITV2 and ITV3 channels and all were of US origin, and mostly over ten years old (Table 3.16). The two most recent films, *Spider-Man* and *Men In Black II*, both theatrically released in 2002, were shown on Sky Movies 1, the only films in the list from a subscription movie channel.

Table 3.16: Top 10 feature films on multi-channel television in 2004

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Crocodile Dundee	ITV2	USA	1986	0.91
2	True Lies	ITV2	USA	1994	0.88
3	Grease	ITV2	USA	1978	0.76
4	Die Hard 2	ITV2	USA	1990	0.74
5	Sister Act	ITV3	USA	1992	0.74
6	Die Hard	ITV2	USA	1989	0.72
7	10 Things I Hate About You	ITV2	USA	1999	0.71
8	Men In Black II	Sky Movies 1	USA	2002	0.71
9	Spider-Man	Sky Movies 1	USA	2002	0.70
10	Pretty Woman	ITV2	USA	1990	0.68

Source: DGA Metrics, BARB

4. Film Societies in the UK

'The voluntary film society sector within the UK is a vibrant, creative and significant part of the overall landscape of film viewing. This is especially so since in many instances it operates in more remote areas of the country and fills the important gap in access and diversity of programming that the commercial sector often does not provide.' (UK Film Council, film society survey report, 2005).

In 2004 the UK Film Council undertook a survey of film societies in order to understand more about the sector. This section contains a summary of the main survey findings, providing a detailed description of film societies' makeup and activities. The full report is available on the UK Film Council web site: www.ukfilmcouncil.org.uk/filmindustry/filmsocsurvey/

4.1 Introduction

Using the information available to it from a variety of sources, the UK Film Council Distribution and Exhibition department sent a questionnaire out to 322 societies identified on its mailing list in summer 2004. 109 responses were received, a response rate of 34%.

4.2 Organisation and membership

The survey found over half (52.8%) the societies have been in existence for 5 years or less. However, one quarter (25.7%) have been around for over 20 years.

Membership of the British Federation of Film Societies is widespread, but by no means comprehensive; nearly two-thirds of respondents reported to be members of BFFS (63.5%).

The mean membership size of societies is 283, but there is wide variation (maximum=8,500, minimum=2). Over one third of societies had membership numbers of between 51 and 150 (34.3%), while 28.3% have less than 50 members. A sizeable minority (7%) have 500+ members (Table 4.1).

Table 4.1 Size of film society membership

Number of members	n	%
51-150	34	34.3
Less than or equal to 50	28	28.3
151-250	20	20.2
251-500	10	10.1
1000+	4	4.0
501-1000	3	3.0
Total		100.0

Source: UK Film Council

Note: three respondents have a membership over 2,000 (2,300, 4,000 and 8,500) and they include a local touring exhibitor and two annual film festivals.

Total membership of the responding societies is 30,356 and over half (54%) of the total membership is female. Over two thirds (69.6%) of the total membership is over the age of 36 (Table 4.2).

Table 4.2: Film society membership by gender and age

	%
Female	54.0
Male	46.0
Total	100.0
Aged under 19	5.8
Aged 19-25	6.3
Aged 26-35	18.3
Aged 36+	69.6
Total	100.0

Source: UK Film Council

4.3 Programming and screenings

Over half of societies (51%) show fewer than 15 films per year, while a minority (6.8%) screen 100+ films a year (Table 4.3).

Table 4.3: Number of films screened annually

Number of screenings	n	%
Less than or equal to 10	26	25.5
11-15	26	25.5
16-20	16	15.7
21-30	14	13.7
31-50	8	7.8
51-100	5	4.9
200+	4	3.9
101 - 200	3	2.9
Total		100.0

Source: UK Film Council

There is also some variation in the frequency of screenings, with over half (52%) of societies screening films fortnightly or more often, while 46.1% have monthly screenings.

Table 4.4 shows that the most common format used by film societies is DVD, followed by video tape. Traditional formats (35mm and 16mm) are used by a minority of films societies.

Table 4.4: Formats

Format	n	% of film societies
DVD	83	76.1
Video tape	53	48.6
35mm	32	29.4
16mm	25	22.9
Digibeta	4	3.7
Other	8	7.3

Source: UK Film Council

Note: respondents could tick more than one category so % does not total 100%

Film societies tend to screen films more than 6 months after they have been released theatrically, although a number did have screenings within a shorter window after release (Table 4.5).

Table 4.5: Length of time screened after theatrical release

Period	n	% of film societies
More than 6 month	63	57.8
5-6 months	31	28.4
Within 3 months	18	16.5
3-4 months	18	16.5

Source: UK Film Council

Note: respondents could tick more than one category so % does not total 100%

This trend is confirmed in Table 4.6, which shows only 32% of societies try to play a film prior to its video/DVD release.

Table 4.6: Play proximity to video/DVD release

Do you try to show films prior to video/DVD release?	n	%
Yes	30	31.9
No	64	68.1
Total		100.0

Source: UK Film Council

Average rental costs vary considerably, with the majority of respondents (54.3%) citing costs of £81 and over (Table 4.7). Just over a fifth of respondents cited costs of £70 or less, while 3.2% quoted rental costs of more than £120.

Table 4.7: Average rental costs

Average costs	n	%
£71-£80	22	23.4
£70 or less	21	22.3
£91-£100	15	16.0
£81-£90	11	11.7
£101-£120	11	11.7
£120+	3	3.2
Multiple responses	11	11.7
Total		100.0

Source: UK Film Council

Respondents were asked to characterise the nature of their programming policy. Table 4.8 shows that 'specialised or non-mainstream' programming was most common (83% of societies had a specialised element), followed by 'mainstream' (60.5%).

Table 4.8: Programming policy

Description	n	% of all societies
Specialised or non-mainstream	91	83.5
Mainstream	66	60.5
Children's films	41	37.6
Other	33	30.3
Bollywood/other	29	26.6

Source: UK Film Council

Note: respondents could tick more than one category so % does not total 100%

The vast majority of film societies produce programme notes and/or film summaries to accompany screenings (88%). Over three quarters (76.8%) of these use stills and film images in programme notes and publicity. Table 4.9 indicates the most popular sources for obtaining these materials.

Table 4.9: Sources of film information and images

Source	n	% of all societies
General film web site	78	71.6
Press reviews	63	57.8
The film's own web site	54	49.5
Distributor	37	33.9
Other	35	32.1

Source: UK Film Council

Note: respondents could tick more than one category so % does not total 100%